JD Edwards EnterpriseOne Applications

Operational Sourcing Implementation Guide

9.2

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Preface

1 Introduction to JD Edwards EnterpriseOne Operational Sourcing

JD Edwards EnterpriseOne Operational Sourcing Overview

Sourcing is the process of identifying a company's purchases (both historic and future) and then defining the optimum supplier mix for those purchases. Different activities can trigger a sourcing event, such as a new product introduction (NPI), the expiration of a contract for an item or commodity group, a cost savings effort by the company, or a buyer's decision to reduce the supply base of the company. The sourcing process includes analyzing historic spending patterns and future demand (planned requirements) and rationalizing suppliers for developing long-term agreements. Other tasks include evaluating supplier offerings, making comparisons, optimizing total cost, and improving and establishing long-term relationships with suppliers. The result is finding the best deal, the right products and services, sufficient availability, and favorable prices.

Sourcing involves two types of events:

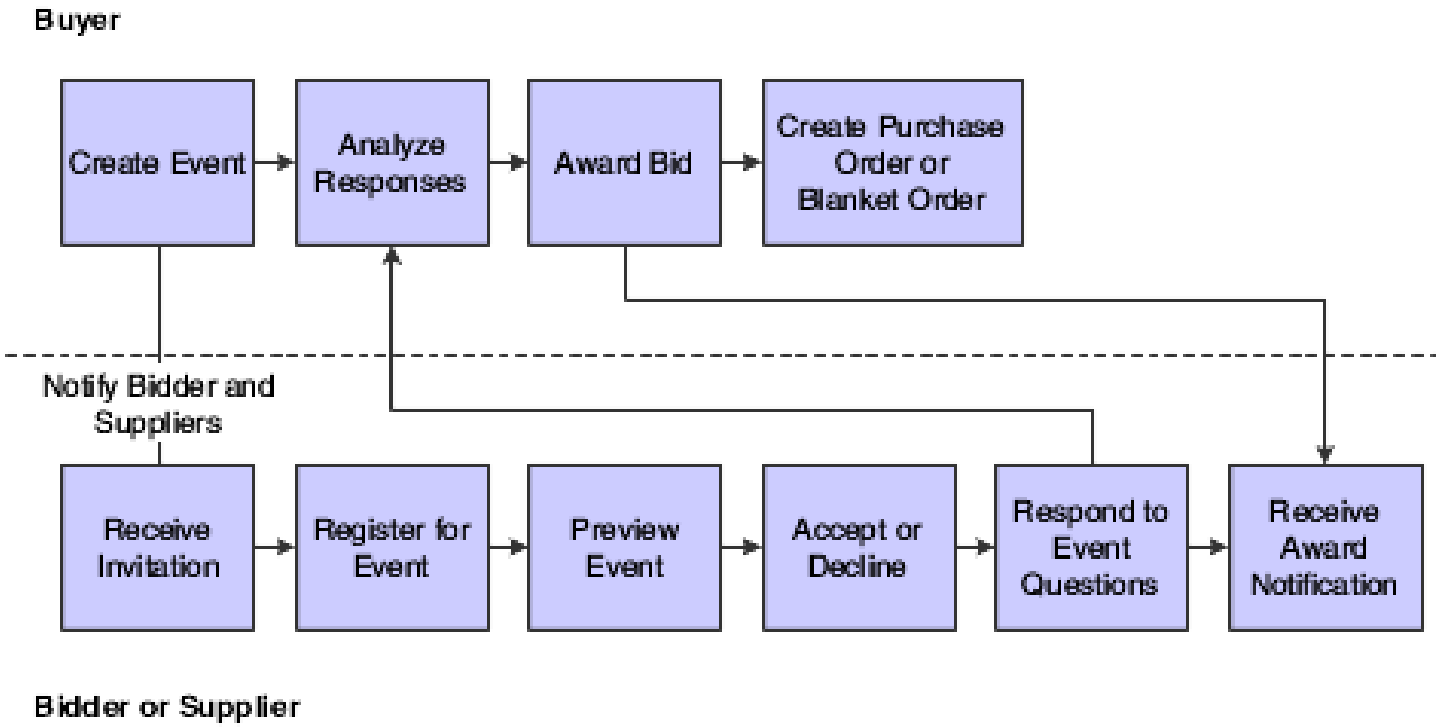
- Requests for information (RFI)
- Requests for quote (RFx)

RFIs are used when you are seeking general information about suppliers' capabilities, products, or services or the industry in general. RFxs are used when you are seeking prices and supply attributes for identified materials or services. The RFx business process enables buyers to aggregate total enterprise requirements for the purpose of negotiating long term partnership relations, thereby reducing material cost through volume pricing. The objectives of operational sourcing are to:

- Streamline manual tasks, interactions, and the sourcing process to drive down sourcing costs.
- Make better decisions based on quote evaluations that provide the lowest total cost alternative.
- Negotiate better prices and more favorable terms through volume pricing.
- Build a company knowledge base on market suppliers and commodities.
- Accelerate time to market for new products.

JD Edwards EnterpriseOne Operational Sourcing Business Processes

This process flow illustrates the JD Edwards EnterpriseOne Operational Sourcing business processes:



We discuss these business processes in the business process chapters in this implementation guide.

JD Edwards EnterpriseOne Operational Sourcing Integrations

The JD Edwards EnterpriseOne Operational Sourcing system integrates with these JD Edwards EnterpriseOne systems from Oracle:

- JD Edwards EnterpriseOne Procurement.
- JD Edwards EnterpriseOne Address Book.
- JD Edwards EnterpriseOne Inventory Management.
- JD Edwards EnterpriseOne General Accounting.

We discuss integration considerations in the implementation chapters in this implementation guide.

JD Edwards EnterpriseOne Procurement

The JD Edwards EnterpriseOne Procurement system integrates with the JD Edwards EnterpriseOne Operational Sourcing system by creating purchase orders and blanket orders when a buyer posts an award for an event.

JD Edwards EnterpriseOne Address Book

The JD Edwards EnterpriseOne Address Book system integrates with the JD Edwards EnterpriseOne Operational Sourcing system by providing mailing, contact, and supplier information for each supplier.

JD Edwards EnterpriseOne Inventory Management

The JD Edwards EnterpriseOne Inventory Management system integrates with the JD Edwards EnterpriseOne Operational Sourcing system by providing item information for each item in an event.

JD Edwards EnterpriseOne General Accounting

The JD Edwards EnterpriseOne General Accounting system integrates with the JD Edwards EnterpriseOne Operational Sourcing system by providing general ledger account numbers that are used in events that are created for services.

JD Edwards EnterpriseOne Operational Sourcing Implementation

This section provides an overview of the steps that are required to implement the JD Edwards EnterpriseOne Operational Sourcing system.

In the planning phase of your implementation, take advantage of all JD Edwards EnterpriseOne sources of information, including the installation guides and troubleshooting information.

When determining which electronic software updates (ESUs) to install for JD Edwards EnterpriseOne Operational Sourcing, use the EnterpriseOne and World Change Assistant. EnterpriseOne and World Change Assistant, a Java-based tool, reduces the time that is required to search and download ESUs by 75 percent or more and enables you to install multiple ESUs at one time.

See *JD Edwards EnterpriseOne Tools Software Updates Guide* .

Installation Steps for the JD Edwards EnterpriseOne Collaborative Portal

> **Note:** The support for OW Portal and Collaborative Portal/IBM WebSphere Portal has been deprecated starting with Tools Release 9.2.26.2.

You can use the JD Edwards EnterpriseOne Collaborative Portal to implement JD Edwards EnterpriseOne Operational Sourcing. You can either use the Sourcing Portal program (P43Q01) or the Supplier Relationship Management portlet.

See *Understanding the JD Edwards EnterpriseOne Operational Sourcing Portal*.

This guide does not describe in detail how to install and configure the Collaborative Portal. However, this section provides an overview of the general steps involved in installing and configuring the Collaborative Portal.

Use the following table as a guide to the installation and configuration process for the Collaborative Portal and the JD Edwards EnterpriseOne portlets. You should perform the steps in the order listed.

1. Verify that you meet the minimum technical requirements (MTRs) to implement the JD Edwards EnterpriseOne Collaborative Portal.
2. Install and configure the JD Edwards EnterpriseOne system.

   Apply the updates, service packs, or ESUs that are specified in the MTRs.

   See your JD Edwards EnterpriseOne installation documentation.
3. Install and configure the IBM WebSphere Portal.

   Use one of these guides:

   - *WebSphere Portal 6.0.1.1 – Multiplatforms Installation and Configuration for iSeries*
   - *WebSphere Portal 6.0.1.1 – Multiplatforms Installation and Configuration for Unix*
   - *WebSphere Portal 6.0.1.1– Multiplatforms Installation and Configuration for Windows*
4. Install and configure the JD Edwards EnterpriseOne Collaborative Portal.

   JD Edwards EnterpriseOne Tools Release 8.98 Portal Reference Guide For All Portals and Platforms
5. Generate JD Edwards EnterpriseOne portlets in the WebClient_Portal.war file.

   Use both of these guides:

   - *JD Edwards EnterpriseOne Tools Form Design Aid Guide*
   - *JD Edwards EnterpriseOne Tools 8.98 HTML Web Server Installation, Appendix A: Generating JD Edwards EnterpriseOne Serialized Objects, Generating an FDA-Created Portlet*
6. Install the WebClient_Portal.war file in the Collaborative Portal.
7. Create pages and add portlets to pages in the Collaborative Portal.

Global Implementation Steps

The following list discusses the suggested implementation steps for the JD Edwards EnterpriseOne Operational Sourcing system.

1. Set up fiscal date patterns, companies, and business units.

   See *"Setting Up Organizations" in the JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .
2. Create the chart of accounts and set up accounts and subledgers.

   See *"Creating the Chart of Accounts" in the JD Edwards EnterpriseOne Applications Financial Management Fundamentals Implementation Guide* .
3. Set up multicurrency processing.

   See *"Understanding Multicurrency Setup" in the JD Edwards EnterpriseOne Applications Multicurrency Processing Implementation Guide* .

4. Set up inventory information, such as branch/plant constants, default locations and printers, automatic accounting instructions (AAIs) for manufacturing and distribution, and document types.

   See *"Setting Up the Inventory Management System" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide* .
5. Set up order line types.

   See *"Setting Up Order Line Types" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .
6. Set up order activity rules.

   See *"Setting Up the Procurement System" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .
7. Set up Procurement constants.

   See *"Setting Up Procurement Constants" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .
8. Define Procurement next numbers.

   See *""Defining Procurement Next Numbers" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .
9. Set up AAIs.

   See *"Setting Up AAIs" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .
10. Set up user defined codes.

    See *"Setting Up user Defined Codes" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .
11. Create tolerance rules.

    See *"Creating Tolerance Rules" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .
12. Set up order hold information.

    See *"Setting Up Order Hold Information" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .
13. Set up landed costs.

    See *"Setting Up Landed Costs" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .
14. Set up nonstock items.

    See *"Setting Up Nonstock Items" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .
15. Define print messages.

    See *"Defining Print Messages" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .
16. Set up templates for purchase orders.

    See *"Setting Up Templates for Purchase Orders" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .
17. Create model logs.

See *"Creating Model Logs" in the JD Edwards EnterpriseOne Applications Procurement Management Implementation Guide* .

JD Edwards EnterpriseOne Operational Sourcing Implementation Steps

This list discusses the suggested application-specific implementation steps for JD Edwards EnterpriseOne Operational Sourcing.

1. Set up roles.

   See *Understanding System Setup for Operational Sourcing*.
2. Set up user-defined codes.

   See *Setting Up UDCs for Operational Sourcing*.
3. Set up bid questions.

   See *Setting Up Bid Question Templates*.
4. Set up address book records for bidders and suppliers.

   See *Setting Up the Operational Sourcing System*.
5. Set up JD Edwards EnterpriseOne Operational Sourcing system constants.

   See *Setting Up System Constants for Operational Sourcing*.

2 Understanding the JD Edwards EnterpriseOne Operational Sourcing Portal

Understanding the JD Edwards EnterpriseOne Operational Sourcing Portal

The Sourcing Portal (P43Q01) is an application created in form design aid (FDA) using the portlet form type. The Sourcing Portal enables you to provide online access to the JD Edwards EnterpriseOne Operational Sourcing system for buyers and bidders. The page for buyers displays both the Event Workbench program (P43Q70) and the Bidder Workbench program (P43Q40). The page for bidders displays the Bidder Workbench and the RFx Bidder Registration (P43Q91) programs.

You can also use the Supplier Relationship Management (SRM) portlet with JD Edwards EnterpriseOne Operational Sourcing. The SRM portlet contains alerts for JD Edwards EnterpriseOne Operational Sourcing that you can configure to display events at each status. For example, you can set up an alert for the buyer that displays all events that are at a status of **Accepted**. When a buyer clicks on an alert link, the system accesses either the Event Workbench program or the Bidder Workbench program, depending on the type of alert. When a bidder clicks on an alert link, the system accesses the Bidder Workbench program.

Below information provides an overview of the general steps involved in installing and configuring the Collaborative Portal and the JD Edwards EnterpriseOne portlets.

> **Note:** The support for OW Portal and Collaborative Portal/IBM WebSphere Portal has been deprecated starting with Tools Release 9.2.26.2.

You should perform the below steps in the order listed:

- Verify that you meet the minimum technical requirements (MTRs) to implement the JD Edwards EnterpriseOne Collaborative Portal.
- Install and configure the JD Edwards EnterpriseOne system.

  Apply the updates, service packs, or Electronic Software Updates (ESUs) specified in the MTRs.

  See your JD Edwards EnterpriseOne installation documentation.
- Install and configure the IBM WebSphere Portal.

  Use one of these guides:

  - *WebSphere Portal 6.0.1.1 – Multiplatforms Installation and Configuration for iSeries*
  - *WebSphere Portal 6.0.1.1 – Multiplatforms Installation and Configuration for Unix*
  - *WebSphere Portal 6.0.1.1 – Multiplatforms Installation and Configuration for Windows*
- Install and configure the JD Edwards EnterpriseOne Collaborative Portal.

  JD Edwards EnterpriseOne Collaborative Portal Reference Guide

- Install the SRMportlets.war file in the Collaborative Portal.

  WebSphere Portal for Multiplatforms:

  See *JD Edwards EnterpriseOne Collaborative Portal Reference Guide* .
- Create pages and add portlets to pages in the Collaborative Portal.

  WebSphere Portal for Multiplatforms:

  See *JD Edwards EnterpriseOne Collaborative Portal Reference Guide*

Note:

- *JD Edwards EnterpriseOne Tools Form Design Aid Guide* .
- *Creating an Event*.
- *Responding to Events*.
- *"Configuring the Portlet" in the JD Edwards EnterpriseOne Applications Buyer Workspace and Supplier Self Service Implementation Guide* .

3 Setting Up the Operational Sourcing System

Understanding System Setup for Operational Sourcing

This table lists the required setup for the JD Edwards EnterpriseOne Operational Sourcing system:

Setup Feature	Explanation
Roles	You must set up user roles for your bidders and suppliers so that you can assign the roles in the Sourcing Constants program (P43Q90). See "Working With User and Role Profiles" in the *JD Edwards EnterpriseOne Tools Security Administration Guide*
UDCs	You must set up several UDCs that are specific to the JD Edwards EnterpriseOne Operational Sourcing system.
Bid questions	You can set up templates for bid questions so that you can use the questions for multiple sourcing events. The system constants for JD Edwards EnterpriseOne Operational Sourcing require you to enter a default price question. You must create the default price question before you set up the system constants.
Address Book records for bidders, suppliers, and sourcing contacts	You must set up bidders and suppliers in the JD Edwards EnterpriseOne Address Book system. After you create Address Book records for your bidders and suppliers, you must then attach who's who records to them in the following way: • The sourcing contact must have the Primary Contact option selected and the contact type must be the type that you set up for sourcing. • The sourcing contact must have an email address and a phone number or fax number. See *"Adding Address Book Records" in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide* . See *"Adding a Who's Who Record" in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide* . See *"Adding Phone Numbers to Who's Who Records" in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide* . See *"Adding Electronic Address Information to Who's Who Records" in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide* .
System constants	You must set up the system constants for JD Edwards EnterpriseOne Operational Sourcing; which provide default processing information.

Setting Up UDCs for Operational Sourcing

The JD Edwards EnterpriseOne Operational Sourcing system includes several UDC tables. Most of the UDC tables have hard-coded values that you cannot change; however, several tables exist for which you must set up the values to meet your business needs. For example, you can set up a UDC table that lists possible reasons for declining an event invitation. Set up the following UDC tables for JD Edwards EnterpriseOne Operational Sourcing:

- 43Q/DR

  This UDC table contains valid reasons for declining an event invitation. Examples include:

  - **01:** Unable to meet event terms.
  - **02:** Insufficient time to respond.
  - **03:** Other

- 43Q/PM

  This UDC table contains valid payment methods for events. Examples include:

  - **CA:** Cash
  - **CC:** Credit card
  - **CH:** Check
  - **EF:** Electronic funds

- 43Q/RR

  This UDC table contains valid revenue ranges for suppliers. Examples include:

  - **H:** Over 1 billion
  - **L:** 0 – 150 million
  - **M:** 300 million to 600 million
  - **MH:** 600 million to 1 billion
  - **ML:** 150 million to 300 million

- 43Q/RS

  This UDC table is reserved for future use.

- 43Q/RT

  This UDC table is reserved for future use.

UDCs That Are Required for Setting Up Constants

When you set up the system constants using the Sourcing Constants program (P43Q90), the system requires you to choose certain default values from UDC tables. Therefore, you must set up these UDCs before setting up the constants:

- 01/CT

  UDC table 01/CT contains valid contact types for contacts that you set up for your suppliers and bidders using the Address Book Revision program (P01012). You must set up a contact type that is specifically for JD Edwards EnterpriseOne Operational Sourcing so that you can specify which of the contacts for the supplier or bidder is the sourcing contact. An example of a sourcing contact type is **SRM:** Sourcing primary contact.

- 00/DT

  UDC table 00/DT contains valid document types for various documents in the JD Edwards EnterpriseOne system. You must set up document types for the following sourcing documents:

  - Request for information (RFI).
  - Request for quote (RFx).

- 40/PM

  UDC table 40/PM contains codes and descriptions for print messages that the system sends to bidders and suppliers to notify them during the various stages of the sourcing process. When you set up the constants for JD Edwards EnterpriseOne Operational Sourcing, you must enter the code for each of the print messages. The system provides UDC values and descriptions for all 10 messages, but you can change the values and descriptions to meet your business needs. The system provides these UDC values:

  - **BIDT&C:** Bidder terms and conditions
  - **AWARDCONF:** Award confirmation
  - **CANCELEVT:** Cancel event
  - **ENDEVENT:** End event
  - **EXTENDEVT:** Extend event
  - **INVBIDDER:** Invite bidder
  - **NOTAWARDED:** Bid unsuccessful
  - **PAUSEEVT:** Pause event
  - **RESUMEEVT:** Resume event

In addition to setting up the UDC codes for print messages, you must also enter the text that the system sends. You use the Print Message Revisions program (P40162) in the JD Edwards EnterpriseOne Inventory Management system to set up the message text.

See *"Setting Up Messages" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide* .

Hard-Coded UDC Values

The following list includes the UDC tables used by the JD Edwards EnterpriseOne Operational Sourcing system that are hard-coded. You do not need to set up these UDC tables, but you should verify that they exist:

- 43Q/AA

  This UDC table contains valid award actions for bids. Values include:

  - **A:** Award Bid
  - **D:** Disallow Bid
  - **N:** No Action Taken
  - **R:** Reject Bid

- 43Q/AC

  This UDC table contains values that indicate whether a currency is the currency that is specified for an event or a currency that is specified in a bid. Values include:

  - **B:** Bid currency
  - **E:** Event currency

- 43Q/AI

  This UDC table contains values that specify whether the system adds an item to the JD Edwards EnterpriseOne Inventory Management tables. Values include:

  - **0:** Do not add.
  - **1:** Add item to system tables.

- 43Q/AT

  This UDC table contains values that specify whether the system creates a blanket order or a purchase order when an award is posted. Values include:

  - **B:** Blanket purchase order
  - **P:** Purchase order

- 43Q/BH

  This UDC table contains values that specify how the system sorts bids when you are viewing bid history by line. Values include:

  - **01:** Bid number
  - **02:** Bidder number
  - **03:** Bidder name
  - **04:** Bid status
  - **05:** Bid score
  - **06:** Award status

- 43Q/BS

  This UDC table contains valid bid statuses. Values include:

  - **D:** Disqualified
  - **P:** Posted
  - **S:** Saved
  - **W:** Disallowed
  - **X:** Canceled

- 43Q/BT

  This UDC table contains bid question types. Values include:

  - **D:** Date
  - **L:** List
  - **M:** Monetary
  - **N:** Numeric
  - **P:** Price
  - **T:** Text
  - **Y:** Yes/No

- 43Q/CC

  This UDC table contains valid commodity levels that the system uses when attaching bid questions to an event. Values include:

  - **AL:** All levels
  - **NL:** None
  - **SL:** Single level

- 43Q/ED

  This UDC table contains valid event dates. Values include:

  - **01:** Preview start date
  - **02:** Start date
  - **03:** End date

- 43Q/EF

  This UDC table contains valid event formats. Values include:

  - **BY:** RFx
  - **RF:** Request for information

- 43Q/ES

  This UDC table contains valid event statuses. Values include:

  - **A:** Awarded
  - **F:** RFI reviewed
  - **I:** Pending RFI review
  - **N:** Not awarded
  - **O:** Open
  - **P:** Posted
  - **Q:** Paused
  - **T:** Pending award
  - **X:** Canceled

- 43Q/IB

  This UDC table contains valid search types for bidders in the Invite Bidders program (P43Q30). Values include:

  - **B:** Bidder
  - **S:** Supplier

- 43Q/IS

  This UDC table contains valid invitation statuses. Values include:

  - **A:** Invite accepted
  - **D:** Invite declined
  - **O:** Registered
  - **P:** Response incomplete
  - **S:** Bid submitted

- 43Q/LS

  This UDC table contains valid statuses for event lines. Values include:

  - **C:** Closed
  - **O:** Open
  - **X:** Canceled

- 43Q/LT

  This UDC table contains valid types of event lines. Values include:

  - **IF:** Item on the fly
  - **SR:** Special request (service)
  - **ST:** Stocked item
  - **SV:** Service item

- 43Q/PB

  This UDC table contains valid values for whether price break information exists. Values include:

  - **0:** No price breaks exist.
  - **1:** User or buyer defined price breaks.

- 43Q/PC

  This UDC table contains valid values for whether price component information exists. Values include:

  - **0:** No price components exist.
  - **1:** Price components exist.

- 43Q/QS

  This UDC table contains valid statuses for bid questions. Values include:

  - **A:** Active
  - **I:** Inactive

- 43Q/S1

  This UDC table contains valid methods by which to sort bidders when you are analyzing header information for events. Values include:

  - **01:** Bidder name
  - **02:** Total event score
  - **03:** Header score
  - **04:** Total bid amount

- 43Q/S2

  This UDC table contains valid methods by which to sort bidders when you are analyzing line information for events. Values include:

  - **01:** Bidder name
  - **02:** Total event score
  - **03:** Line score
  - **04:** Line amount
  - **05:** Award quantity

- 43Q/S3

  This UDC table contains valid methods by which to sort bidders when you are analyzing RFI bids. Values include:

  - **01:** Bidder name
  - **02:** Header score

- 43Q/SB

  This UDC table contains valid methods by which to sort bidders in the Invite Bidders program (P43Q30). Values include:

  - **ALPH:** Alpha name
  - **AN8:** Address number
  - **AT1:** Search type

- 43Q/SO

  This UDC table contains valid methods by which to sort bid questions. Values include:

  - **BIDCODE:** Bid question code
  - **DESC:** Description

- 43Q/TM

  This UDC table contains valid measures of time that you use to specify default durations for events in the Sourcing Constants program (P43Q90). Values include:

  - **D:** Days
  - **H:** Hours
  - **M:** Minutes

- 43Q/WB
  This UDC table contains valid methods by which to sort events in the Event Workbench program. Values include:
  - **EVFT:** Event format
  - **EVNU:** Event number
  - **EVST:** Event status
  - **EVTN:** Event name
  - **MCU:** Branch plant
- 43Q/WS
  This UDC table contains valid methods by which to sort events in the Bidder Workbench program. Values include:
  - **SBDHP:** Bid history
  - **TM:** Event end date
  - **FT:** Event type
  - **NU:** Event number
  - **ST:** Event status
  - **SX:** Event start date
  - **TN:** Event name
  - **ST:** Bidder status
- 43Q/YN
  This UDC table contains valid responses to yes/no questions. Values are:
  - **N:** No
  - **Y:** Yes

Setting Up Bid Question Templates

This section provides an overview of bid question templates and discusses how to set up bid question templates.

Understanding Bid Question Templates

Use the Bid Questions Template Setup program (P43Q60) to add bid question templates. Bid question templates provide your organization with a predefined list of bid questions that you can use for multiple sourcing events. You can create both header questions and line questions.

You set up header questions to ask information that is specific to a company. Examples include:

- How long has your company been in business?
- What is your company's annual revenue?

- Is your company ISO (International Organization for Standardization) certified?

You set up line questions to ask information that is specific to the item for which you have created the sourcing event. Examples include:

- What is the price of your item?
- What are the available colors of your item?
- What are the available sizes of your item?

Types of Bid Questions

You can create the following types of bid questions:

- Date
- List
- Monetary
- Numeric
- Price
- Text
- Yes/No

Date, monetary, and numeric questions all require you to use the Best Response and Worst Response fields to create a range of possible responses. You can specify whether bidders can enter a value that is outside of the range.

List questions require you to set up a list of possible responses and corresponding weights. You can specify whether bidders can select multiple values from the list. An example of a list question is: "What are the available sizes of your product?"

When you create price questions, you can create a list of components so that bidders must break out their price by components, such as shipping and handling. Each event line must have at least a price question attached to it, and each line can have only one price question. You must create a default price question so that the system can assign the default question if you do not assign one. You must also enter the default price question in the Sourcing Constants program.

See *Setting Up System Constants for Operational Sourcing*.

When you create text questions, you create open-ended questions and you specify an ideal response. An example of a text question is: "What is your quality control process?"

You also create an ideal answer when you set up yes/no questions. You must specify whether the ideal response is yes or no. An example of a yes/no question is: "Is your company ISO certified?"

Bid Questions for Items and Commodities

You can assign an item number or a commodity to line questions. When you create an event for a specific item, the system displays all line questions that are attached to that item. Depending on how you set the Commodity Level Search option in the Sourcing Constants program (P43Q90), the system can also display either all questions based on the event line commodity, or all questions based on the event line commodity as well as all other commodities at a higher level in the commodity structure. You set up the commodity structure in the Requisition Self Service system.

See *"Setting Up the Commodity Structure" in the JD Edwards EnterpriseOne Applications Requisition Self Service Implementation Guide* .

See *Setting Up System Constants for Operational Sourcing*.

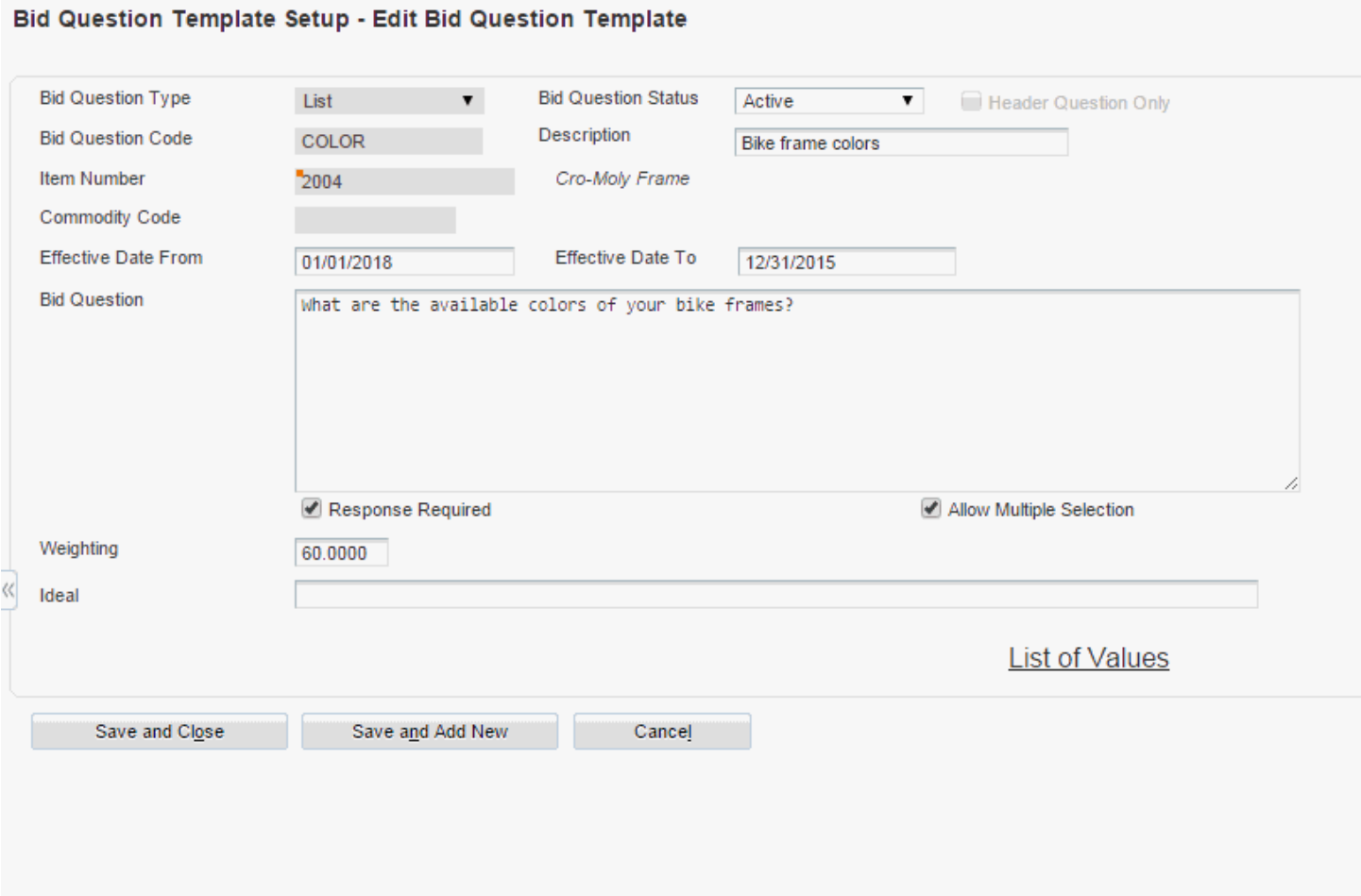
When the system displays the event line questions for the item or commodity of the event line, you can either use the questions as is, or you can modify the questions to meet the needs of the specific event. You can also add new questions.

Forms Used to Set Up Bid Question Templates

Form Name	FormID	Navigation	Usage
Search for Bid Questions	W43Q60A	Setup (G43Q41), Bid Questions Setup	Review and search for existing bid question templates.
Add Bid Question Template	W43W60B	Click Add, Edit, or Copy on the Search for Bid Questions form.	Add new bid question templates, and edit or copy existing templates.
List Question - List of Values	W43Q60D	Click List of Values on the Add Bid Question Template form when creating a list question.	Add values for a list question.
Price Question - Item Components	W43Q60C	Click List of Components on the Add Bid Question Template form.	Create a list of components for an item.

Setting Up Bid Question Templates

Access the Add Bid Question Template form.



Bid Question Type

Select a type for the bid question, indicating the type of response that you expect to receive. These values are hard-coded in UDC table 43Q/BT and include **Text, Price, Monetary, Date, Quantity, Yes/No,** and **List.**

Header Question Only

Select to indicate that this question is only a header question; it does not apply to individual event lines.

Bid Question Code

Enter a code for this bid question. Enter up to 18 alphanumeric characters.

Description

Enter a description for the bid question. Enter up to 30 alphanumeric characters.

Bid Question Status

Specify whether the bid question is active or inactive. If you select **Inactive,** the system does not allow you to attach this question to a sourcing event.

Item Number

Specify an item number for this question if the question applies to a specific item. If you select the Header Question Only check box, the system disables this field.

Commodity Code

Specify a commodity code for this question if the question applies to a specific commodity code. If you select the Header Question Only check box, the system disables this field.

See *"Setting Up the Commodity Structure" in the JD Edwards EnterpriseOne Applications Requisition Self Service Implementation Guide* .

Effective Date From and Effective Date To

Specify a beginning and ending date to define a range in which the bid question is available to attach to a sourcing event. If you leave the Effective Date From field blank, the system uses the current date and time. If you use the Effective Date To field blank, the system uses the date that is specified Bid Question End Effective Date field in the Sourcing Constants program (P43Q90).

Bid Question

Enter text for the bid question.

Response Required

Select to indicate that the bidder must respond to this question.

Allow Out of Range

Select to allow bidders to enter a date that does not fall within the range that is specified in the Best Response and Worst Response fields. This check box appears only when you create an **Amount, Numeric, Price,** or **Date** bid question.

Weighting

Specify a percentage to identify the level of importance of the bid question. The system uses this percentage when analyzing and scoring the bid responses.

Ideal

Enter text to indicate the ideal response to a text question. The system displays this field only when the question type is **Text. List,** or **Yes/No.**

List of Values

Click to create a list of values and the weights associated with the values. This link appears only when you create a **List** bid question.

Allow Multiple Selection

Select to allow bidders to select more than one value in a list question. This check box appears only when you create a **List** bid question.

Best Response and Worst Response

Enter the best and worst response to the question. The system displays these fields only when the question type is **Date, Numeric, Monetary,** or **Price.**

List of Components

Enter the item components for which you want the bidder to enter prices. For example, enter **Shipping, Handling,** and so on. This field appears only when you select a **Price** question type.

Setting Up System Constants for Operational Sourcing

This section provides an overview of system constants for JD Edwards EnterpriseOne Operational Sourcing, lists prerequisites, and discusses how to set up the system constants.

Understanding System Constants for Operational Sourcing

Use the Sourcing Constants program (P43Q90) to set up the constants for JD Edwards EnterpriseOne Operational Sourcing. The system constants for JD Edwards EnterpriseOne Operational Sourcing provide information for bidders and suppliers, such as search types, user roles, and the sourcing contact type. You also use the constants to provide default settings for events, such as whether bids are required and whether manual extensions are allowed. When you create an event, the system populates the event properties with the values that are specified in the constants, but you can change them as needed.

Prerequisites

Before you complete the task in this section:

- Set up user roles.
- Set up UDCs for JD Edwards EnterpriseOne Operational Sourcing.
- Set up a default price bid question.

See *Setting Up the Operational Sourcing System*.

See *Setting Up UDCs for Operational Sourcing*.

See *Setting Up Bid Question Templates*.

Form Used to Set Up System Constants for Operational Sourcing

Form Name	FormID	Navigation	Usage
Sourcing Constants	W43Q90A	Setup (G43Q41), Sourcing Constants	Set up system constants.

Setting Up System Constants

Access the Sourcing Constants form.

General Event Information

Supplier Search Type
Enter the default search type for the system to use to identify suppliers.

Bidder Search Type
Enter the default search type for the system to identify bidders.

Commodity Level Search

Specify the commodity code level for the system to use to automatically retrieve and attach bid questions when an event is created. Values are:

AL: The system retrieves and automatically attaches bid questions based on the commodity code for the event line. as well as all other commodity codes that are higher in the hierarchy.

NL: The system does not retrieve and automatically attach bid questions based on the event line commodity code.

SL: The system retrieves and automatically attaches bid questions based on only the event line commodity code.

The system stores these values in UDC table 43Q/CC.

Bidder Role

Specify the security role for a bidder who is not yet an established supplier within the JD Edwards EnterpriseOne system. The system uses this value when the user signs in to the JD Edwards EnterpriseOne system. The role that you specify for the bidder must be different from the role that you specify for the supplier in the Supplier Role field. When a bidder is awarded a bid, the system changes that bidder's role to the role for a supplier.

See "Working with User and Role Profiles" in the *JD Edwards EnterpriseOne Tools Security Administration Guide*

Supplier Role

Specify the security role for a supplier who is already established in the JD Edwards EnterpriseOne system. The system uses this value when the user signs in to the JD Edwards EnterpriseOne system.

See *JD Edwards EnterpriseOne Tools Security Administration Guide* .

Question Number Increment Factor

Specify a number by which the system increments the system-generated bid numbers for a bid question that is associated with an event or event line. If you leave this field blank, the system uses a default factor of **1.**

Sourcing Primary Contact Type

Specify a primary contact type for the sourcing contact. Select a valid type from UDC table 01/CT. When you set up bidders and suppliers for sourcing, you must create a who's who record for the sourcing contact using the contact type that you specify in this field.

See *"Adding Who's Who Information to Address Book Records" in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide* .

Event Dates/Times

The system stores the event preview and the start and end dates and times in universal time code (UTC) so that bidders will be able to view events at the correct time in their time zones.

Bid Question End Effective Date

Specify an ending date and time for all questions that are available to attach to an event. The system uses this date as the default end effective date when you leave the Effective Date To field blank when setting up bid question templates.

Event Preview Default Time/UOM (event preview default time unit of measure)

Specify a default duration of time for event preview. The system adds this duration of time to the current system date and time to calculate the default time for event preview. Enter a number and then select a unit of measure. Valid units of measure are:

D: Days

H: Hours

M: Minutes

The system stores valid units of measure in UDC table 43Q/TM.

Event Start Default Time/UOM
Specify a duration of time for the system to add to the preview date and time to calculate the default start date and time.

Event End Default Time/UOM
Specify a duration of time for the system to add to the start date and time to calculate the default end date and time.

RFx Properties

When you create a request for quote, the system populates the event properties with the values and settings that you specify.

Bid Required
Select to indicate that bidders must enter a bid amount for all event lines and a bid quantity for all quantity-based lines. If you leave this check box cleared, bidders must enter bid amounts and quantities on only event lines that have the Bid Required check box selected on the line.

Display Bid Question Weights
Select to allow bidders to view the weight that is associated with a bid question.

Display Bid History Page
Select to allow bidders to view bid history.

Default Price Bid Question Code
Specify the code for the generic price bid question. The system updates the RFx detail lines with this code during the Create Event process. The system uses this generic price bid question only if you selected the Bid Required property or the RFx detail line and did not select any other price bid question.

RFx Document Type
Specify a document type for the system to assign to an RFx event. The system uses this document type for next numbers and as a key for the sourcing event tables.

Create Blanket or PO (purchase order)
Specify whether the system creates a blanket order or purchase order when awarding an event. Values are hard-coded in UDC table 43Q/BP and include:

B: Blanket order

P: Purchase order

Line Quantity Required
Select to force the bidders' bid quantity to be equal to the line quantity that you enter on the sourcing event.

Sealed Event
Select to specify that the event is sealed. If you select this check box, the event originator cannot view the bids until after the event has ended. If you do not select this check box, the event originator can view bids prior to the end of the event.

Allow Manual Extensions
Select to allow users to change the event end date and time after the event has been posted.

RFI Properties

When you create an RFI, the system populates the event properties with the settings that you specify.

Bid Required

Select to require bidders to respond to all lines of the RFI.

Display Bid Question Weights
Select to allow bidders to see the weight that is associated with an RFI bid question.

Display Bid History Page
Select to display the bid history page for bidders for an event.

Score RFI Event (request for information)
Select to specify that the system should score the RFI.

Allow Manual Extensions
Select to allow users to change the event end date and time after the RFI event has been posted.

RFI Document Type (request for information)
Enter a document type for the system to assign to an RFI event. The system uses this document type for next numbers and as a key for the sourcing event tables.

Bid History Properties

These options specify the information that bidders can view when viewing bid history.

Display All Bids
Select to allow bidders to see all bids in the bid history.

Show Award Details
Select to allow bidders to see the award details in the bid history. The system assigns this value when you analyze the event.

Display Bid Scores
Select to allow bidders to view the scores of all bidders when reviewing bid history. The system assigns this value when you analyze the event. If you do not select this check box, bidders can see only their bid scores.

Display Total Bid Price
Select to allow bidders to see the total bid price in the bid history. The system assigns this value when you analyze the event.

Display Bid Question
Select to allow bidders to see the bid questions in the bid history. The system assigns this value when you analyze the event.

Sourcing Messages

You must enter a valid print message from UDC table 40/PM for each type of event message. You can send the print message using email, fax, or a printed document.

Event Invite Send Message
Specify the print message for the system to send to bidders when inviting them to an event.

Event Cancel Send Message
Specify the print message containing the text that is sent to bidders when a buyer cancels an event.

Event Pause Send Message
Specify the print message containing the text that is sent to bidders when a buyer pauses an event.

Event Resume Send Message
Specify the print message containing the text that is sent to bidders when a buyer resumes an event.

Event End Send Message

Specify the print message containing the text that is sent to bidders when a buyer ends an event before the original end date.

Event Extend Message

Specify the print message containing the text that is sent to bidders when you extend the end date of an event.

Event Award Send Message

Specify the print message containing the text that is sent to bidders when they are awarded an event or event lines.

Unsuccessful Bid Send Message

Specify the print message containing the text that is sent to bidders when they are not awarded an event or event lines.

Invite Terms and Conditions

Specify the print message containing the terms and conditions that bidders must agree to accept before they can respond to an event.

Bidder URL

Enter the URL that bidders use to access the Bidder Workbench to respond to sourcing events.

4 Creating an Event

Understanding Events

Use the Event Workbench program (P43Q70) to review and create sourcing events. This program enables you to create both a request for information (RFI) and a request for quote (RFx).

When you create a sourcing event, you enter information to define the event, such as the business unit and the event name. Using settings in the Sourcing Constants program (P43Q90), the system provides default values for the event properties, such as whether a bid is required and whether to display question weights. You can either use the default values or change them as needed for each event that you create.

After defining the event, you must attach bid questions to your event. For an RFI, you attach only header questions, which typically ask for information about a company. For a request for quote, you attach header questions, which are optional, and detail questions, which ask for specific information about the items for which you created the event. You can use existing bid questions, modify existing bid questions, or add new questions. The percentage for the header questions must equal 100, and the percentage for the line questions must also equal 100. You can either assign a percentage to the header questions and add that percentage into each event line, or add the percentage to the combined percentages of each line.

See *Understanding Header and Line Question Weighting*.

After defining the event and attaching questions, you must invite bidders. You can invite bidders and suppliers that already exist in the JD Edwards EnterpriseOne Address Book system, or you can add them on an ad hoc basis. When you add bidders on an ad hoc basis, the system prompts you to enter a company name, a contact name, and contact information, and then adds the bidder to the Address Book Master table (F0101). For ad hoc bidders, the system does not create a supplier master record unless they are awarded a bid. The system stores bidders that you have invited to the event in the Event Invited Bidders table (F43Q30).

(Release 9.2 Update 26) When you add bidders or suppliers to an event, the system validates the associated user profile and role relationship defined in the User Profile Revisions program (P0092). The system allows you to add only bidders or suppliers with the required user role to the event.

When you finish creating the event, click Submit to post the event for bidders to view. When you click Submit, the system notifies invited bidders using the preferred contact method that is specified in the bidders' address book records.

See *Understanding System Setup for Operational Sourcing*.

Prerequisites

Before completing the tasks in this chapter:

- Set up the JD Edwards EnterpriseOne Operational Sourcing system constants.
- Set up bid question templates.
- Set up processing options for the Create Event Processing, Create Event, and Event Workbench programs.

See *Setting Up System Constants for Operational Sourcing Setting Up Bid Question Templates*.

See *Setting Processing Options for Create Event Processing (P43Q0040)*.

See *Setting Processing Options for Create Event (P43Q10)*.

See *Setting Processing Options for Event Workbench (P43Q70)*.

Understanding the Processing Options for the Event Workbench Program

Before using the Event Workbench program (P43Q70), you must set up processing options for three separate programs in the following order:

1. Create Event Processing (P43Q0040)

   These processing options provide the default line type for event lines, specify how the system validates the branch/plant, and provide a version of the Sourcing Fax Event Message program (P43Q90).
2. Create Event (P43Q10)

   These processing options provide default versions of the Create Event Processing and Copy From Bill of Material programs and specify how the system displays the account number fields in the Event Workbench program.
3. Event Workbench (P43Q70)

   These processing options provide default versions of the Create Event, Analyze Event, and Bid History programs and provide a version of the Sourcing Fax Event Message program (P43Q90).

You can access the processing options for the Event Workbench program from the menu; but to access the processing options for the Create Event Processing and Create Event programs, you must use the Interactive Versions program.

See *JD Edwards EnterpriseOne Tools Foundation Guide* .

Creating an RFI

This section provides an overview of RFIs and discusses how to:

- Set processing options for Create Event Processing (P43Q0040).
- Set processing options for Create Event (P43Q10).
- Set processing options for Event Workbench (P43Q70).
- Add an RFI.
- Invite bidders.
- Add ad hoc bidders.
- Add bid questions to an event.
- Copy an RFI.

Understanding RFIs

You create RFIs to gather information about organizations. You can use an RFI to ask questions about potential bidders, such as:

- What is the company's annual revenue?
- How long has the company been in business?
- Is the company ISO (International Organization for Standardization) certified?

Because RFIs are used only for gathering information about companies, you attach only header bid questions to them. When you analyze the responses from the bidders for your RFI, you can efficiently eliminate companies that have unfavorable responses, therefore providing you with an idea of what bidders to invite to a request for quote event.

Forms Used to Create an RFI

Form Name	FormID	Navigation	Usage
Search for Events	W43Q70A	Daily Processing (G43Q11), Event Workbench	View events.
Add/Edit Event	W43W10A	Click Add RFI on the Search for Events form.	Add an RFI.
Search and Select Bidders	W43Q30A	Click the Invite Bidders button on the Add/Edit Event form.	Invite bidders.
Select Contacts	W43Q30C	Click Review Contacts on the Search and Select Bidders form.	Change the primary contact for the bidder.
Add Adhoc Bidder	W43Q30B	Click Add Adhoc Bidder on the Search and Select Bidders form	Add an ad hoc bidder.
Event Header Bid Questions	W43Q20D	Click Maintain RFI Event Questions on the Add/ Edit Event form.	Add bid questions to an event.
Search for RFIs	W43Q201A	Click Copy From RFI on the Add/Edit Event form.	Copy an RFI.

Setting Processing Options for Create Event Processing (P43Q0040)

These processing options provide default processing information.

Defaults

1. Line Type

Specify the default line type for the event lines that you create. The line type determines how the system processes lines on a transaction. The line type affects the systems with which the transaction interacts (JD Edwards EnterpriseOne General Ledger, JD Edwards EnterpriseOne Job Cost, JD Edwards EnterpriseOne Accounts Payable, JD Edwards EnterpriseOne Accounts Receivable, and JD Edwards EnterpriseOne Inventory Management). The line type also specifies the conditions for including a line on reports and in calculations. Specify a valid line type from the Line Type Constants Revisions program (P40205). Examples include:

S: Stock item.

J: Job Cost, subcontracts, or purchasing to the general ledger.

N: Nonstock item.

Interfaces

1. Business Unit Validation

Specify how the system validates the branch/plant. Values are:

Blank: The system validates the branch/plant against the Business Unit Master table (F0006). Typically, you use this processing option when you are performing services expenditure purchasing. When you leave this processing option blank, the Ship To address book number is supplied by default from the address book number in the Business Unit Master table (F0006). You can access the Business Unit Master table through the Revise Single Business Unit program.

1: The system validates the branch/plant against the Inventory Constants table (F41001). If you are performing stock purchasing, enter **1** for this processing option. When you enter **1,** the system uses the address book number in the Inventory Constants table (F41001) as the default for the Ship To address book number.

Versions

1. Sourcing Event Fax Messaging Version

Specify a version of the Sourcing Fax Event Message program (R43Q90). If you leave this processing option blank, the system uses version ZJDE0001.

Setting Processing Options for Create Event (P43Q10)

These processing options provide default processing information for creating events.

Versions

1. Create Event Processing (P43Q0040)

Specify a version of the Create Event Processing program for the system to use. If you leave this processing option blank, the system uses version ZJDE0001.

2. Copy from Bill of Material (P43Q101)
Specify a version of the Copy from Bill of Material program for the system to use. If you leave this processing option blank, the system uses version ZJDE0001.

Display

1. Account Display
Specify how the system should display the Account Number field on the Add/Edit event form. Values are:

Blank: The system displays the Account Number field and you enter the account in the standard format of business unit.object account.subsidiary.

1: The system displays the fields Business Unit, Obj Acct, and Sub and you enter each segment of the account number into the separate fields.

2: The system displays both the Account Number field and the Business Unit, Obj Acct, and Sub fields.

Setting Processing Options for Event Workbench (P43Q70)

These processing options provide default processing information for creating events.

Versions

1. Create Event
Specify a version for the system to use when accessing the Create Event program (P43Q10). If you leave this processing option blank, the system uses version ZJDE0001.

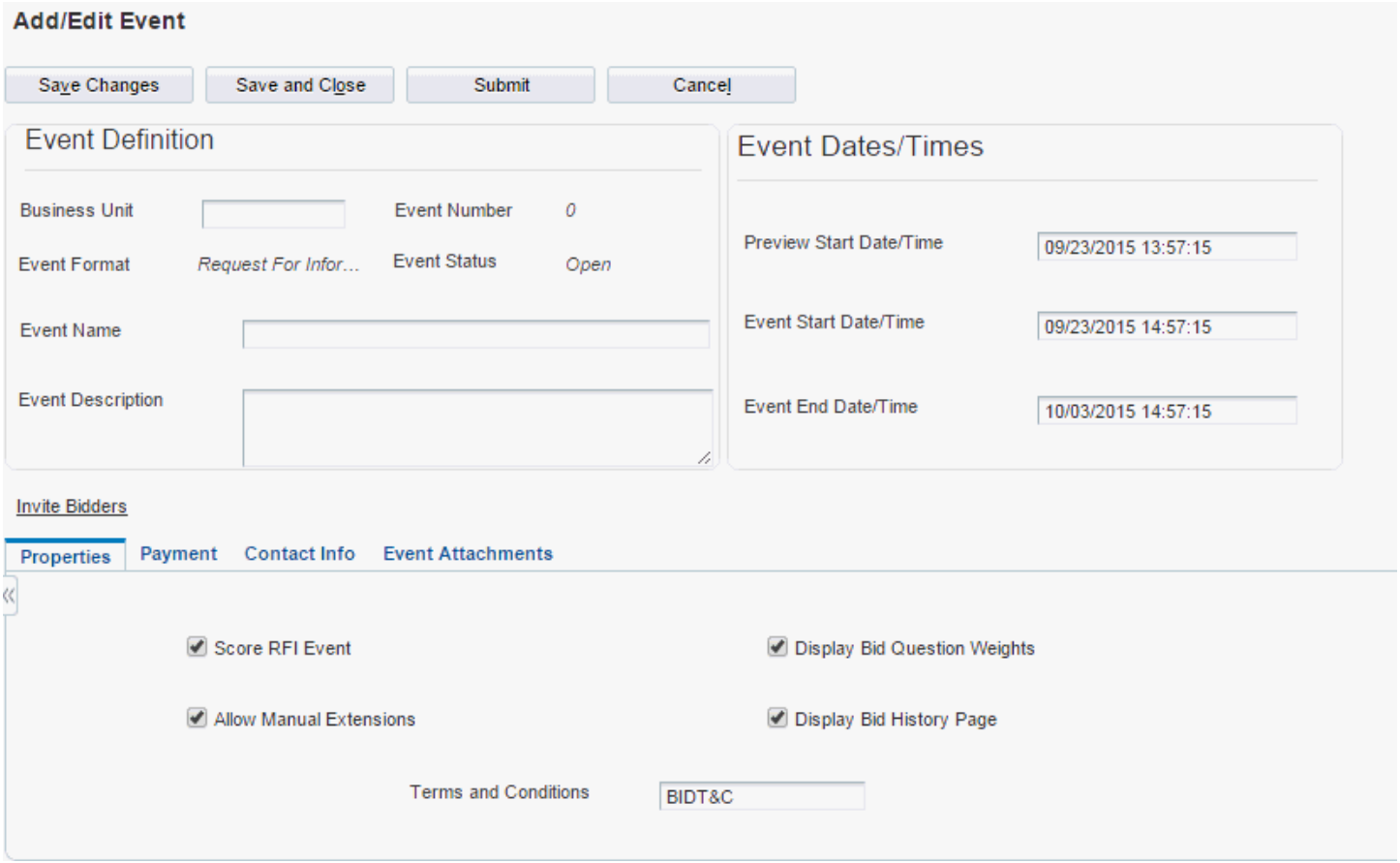
2. Analyze Event
Specify a version for the system to use when accessing the Analyze Event program (P43Q50). If you leave this processing option blank, the system uses version ZJDE0001.

3. Bid History
Specify a version for the system to use when accessing the Bid History program (P43Q41). If you leave this processing option blank, the system uses version ZJDE0001.

4. Fax Event Message
Specify a version of the Sourcing Fax Message program (R43Q90).

Adding an RFI

Access the Add/Edit Event form.



1. Complete the following fields:
    - **Business Unit**

      Enter the business unit for which you are creating the sourcing event.
    - **Event Name**

      Enter a name for the sourcing event.
    - **Event Description**

      Enter a description for the sourcing event.
    - **Preview Start Date/Time**

      The system populates this field with the date and time that are specified in the Sourcing Constants program. Change the value in this field if you do not want to use the default start date and time.
    - **Event Start Date/Time**

      The system populates this field with the date and time that are specified in the Sourcing Constants program. Change the value in this field if you do not want to use the default start date and time.
    - **Event End Date/Time**

      The system populates this field with the date and time that are specified in the Sourcing Constants program. Change the value in this field if you do not want to use the default end date and time.

2. Complete the following fields on the Properties tab:

   - **Score RFI Event**

     Select to score the RFI event.
   - **Allow Manual Extensions**

     Select to allow users to change the event end date and time after the event has been posted.
   - **Display Bid Question Weights**

     Select to display the question weights for the bidder.
   - **Display Bid History Page**

     Select to enable bidders to view bid history. If you select this option, bidders will be able to review their responses to their questions after submitting a response for an event.
   - **Terms and Conditions**

     Specify the terms and conditions that the bidder must agree to accept before the bidder can respond to an event. Select a valid code from user-defined code (UDC) table 40/PM.
3. Complete the following fields on the Payment tab:

   - **Event Currency Code**

     The system uses the currency code of the business unit as the default currency.
   - **Multiple Currencies Event**

     Select to allow bids in foreign currencies. If you do not select this option, the system accepts bids in your company's domestic currency only.
   - **Currencies Allowed**

     Click to access the Edit Allowed Currencies for Event form, where you can specify the currencies that bidders can use for the event. The system displays this link only when you click the **Multiple Currencies Event** button. You must specify all currencies that you plan to allow for the event, even the domestic currency of your company.
4. Complete the following fields on the Contact Info tab:

   - **Buyer**

     Enter the address book number of the buyer for the event. After you enter the address book number, the system populates the **Contact Name, E-Mail,** and **Phone Number** fields with the information that is associated with the address book number.
5. Enter text as an attachment to the event on the Event Attachments tab.
6. Click Allow Bidder to View Attachment if you want the bidder to be able to view the text that you entered on the Event Attachment tab.
7. Click Invite Bidders to select bidders for the event.

   See *Inviting Bidders*.
8. Click Maintain RFI Event Questions to add header questions to the event.

   See *Adding Bid Questions to an Event*.
9. When you are finished creating the event, click Submit.

Inviting Bidders

Access the Search and Select Bidders form.

1. To filter your search for bidders, complete one or more of the following fields:
   - Search Type
   - Address Number
   - Alpha Name
2. To sort bidders, select a value in the Sort By field, and then click either the Ascending or Descending option.
3. Click Find.

   The system displays the applicable bidders on the Available Bidders form.
4. Choose the bidders that you want to participate in the event by selecting one or more bidders, and then click the Select Bidders button.

   The system displays the bidders that you selected in the Selected Bidders subform.

   > **Note:** You can select only bidders that have a primary contact set up in the Who's Who program (P0111), with the same contact type that is specified in the Sourcing Constants program (P43Q90). The primary contact must also have a preferred contact method. If the bidder does not have the correct contact information set up, you can add it by clicking the link for the supplier or bidder's address book number. (Release 9.2 Update 26) The selected bidder or supplier contact must have an existing user profile and role relationship in the User Profile Revisions program (P0092).

   See *Setting Up System Constants*.
5. To add bidders that do not already exist in your system, click the Add Adhoc Bidder button.

   See *Adding Ad Hoc Bidders*.
6. Click the Review Contacts button to review and, if necessary, change contacts for the bidder.
7. Click the Remove Bidder From List button to remove bidders.
8. Click Close to save the list of bidders that you want to participate in the event.

Adding Ad Hoc Bidders

Access the Add Adhoc Bidder form.

Address Number
The system provides the next available address book number.

Company Name
Enter the company name of the bidder. The system uses the name that you enter as the alpha name for the address book record that it creates.

Contact Name
Enter the name of the contact person for the bidder. The system adds this name as the primary contact for the bidder, and assigns the contact type that you specified in the Sourcing Constants. The system updates the Address Book - Who's Who table (F0111) with the primary contact and contact type that you specify.

Electronic Address
Enter the email address for the primary contact. The system updates the Electronic Address table (F01151) with the email address that you specify.

Phone Number
Enter the phone number for the primary contact. The system updates the Address Book - Phone Numbers table (F0115) with the phone number that you specify.

Fax Number
Enter the fax number for the primary contact. The system updates the Address Book - Phone Numbers table (F0115) with the phone number that you specify.

Send Method
Specify whether to send communication to the bidder using fax or email. The system updates the Preferred Contact Method field in the Address Book - Who's Who table with the value that you specify.

> **Note:** (Release 9.2 Update 26) Before you can add an ad hoc bidder to an event, the required user profile and role relationship must be defined in the User Profile Revisions program (P0092). If the required user role is not defined, the system does not allow you to add the bidder to the event.

Adding Bid Questions to an Event

Access the Event Header Bid Questions form.

1. Click Add on the Event Header Bid Questions form.
2. To use an existing header question, click Search Template on the Create Event Question form.

   To create a new header bid question, proceed to step 5.
3. Choose questions on the Search for Bid Questions form and click Select.
4. Click Save and Close on the Create Event Question form, or make any necessary changes to the question and then click Save and Close.

   > **Note:** Click Add to Template if you want to save your changes as a new question template.

5. To create a new header question, complete the following fields on the Create Event Question form:
    - Bid Question Type
    - Bid Question Number
    - Bid Question Code
    - Description
    - Weighting
    - Response Required
    - Allow Out of Range
    - Allow Multiple Selection
    - Ideal
    - Add to Template

      Select this option to add this header question as a template.
    - Display Bid Question

See *Setting Up Bid Question Templates*.

Copying an RFI

Access the Search for RFIs form.

1. Select the event that you want to copy, and click Display.

   The system displays the header questions and bidders that are associated with the event.
2. Select the header questions and bidders that you want to copy, and click Select and Copy.
3. Make changes as needed on the Add/Edit Event form, and click Submit.

Creating a Request for Quote

This section provides overviews of requests for quotes and header and line question weighting and discusses how to:

- Add a request for quote.
- Add additional line information.
- Add ad hoc items.
- Copy from an RFx.
- Copy from a bill of material (BOM).

Understanding Requests for Quotes

Use the Event Workbench program (P43Q70) to create a request for quote (RFx). In addition to creating a new request for quote, you can also use one of the following methods:

- Copy an existing RFI.

You can copy from RFI events at a status of **RFI Reviewed** only. The system copies the invited bidders and the header questions to create the new RFx. The system does not copy any invited bidders for which a value of **D** (disallow) or **R** (rejected) is in the Award Action field for the RFI.

- Copy an existing request for quote (RFx).

  You can copy from RFx events at a status of **Awarded** only. The system copies the invited bidders, header questions, selected event lines, and line questions to create the new RFx. The system does not copy any invited bidders for which a value of **D** (disallow) or **R** (rejected) is in the Award Action field for the RFI.

- Copying a BOM.

  The system copies the selected item components to create the event lines for the RFx.

Creating a request for quote is similar to creating a request for information: you define the event, invite bidders, and attach questions. However, a request for quote has the additional task of adding lines to the event. You can create lines for services, inventory items, and items that you add on an ad hoc basis.

For service lines, you enter the account number for the service. Using the processing options for the Create Event program (P43Q10), you can specify the format in which you enter the account number. You must use line type **J** when entering a service line.

When you create event lines for items, you specify information such as item number, quantity, unit of measure, and whether a bid is required on the event line. Using the Edit link in the Additional Line Info field, you can add attachments to the line and you can specify whether bidders must bid on the quantity that is specified on the line. If you allow bidders to bid on a quantity other than that specified in the line, you can define a minimum and maximum quantity.

You can also create event lines for ad hoc items, which are items that do not already exist in your inventory. When you create ad hoc items, the system enables you to specify a new number for the item, but it does not add the item to the JD Edwards EnterpriseOne Inventory Management system until you create the purchase order or blanket order.

While header questions are optional for a request for quote, you must attach at least a price question to each line of the event. If you do not attach a price question to a line, the system searches for an associated price question to assign using the following hierarchy:

1. Using the item number that you specified in the event line, the system searches the Bid Questions table (F43Q60) for a price question that is attached to the item number.
2. If unsuccessful, the system determines whether the item in the event line has a commodity code attached to it and, if so, searches the Bid Questions table (F43Q60) for a price question that is attached to the commodity code.

If the system does not locate a price question attached to the item number or commodity, it attaches the default price question that you set up in the Sourcing Constants program (P43Q90).

See *Setting Up System Constants for Operational Sourcing*.

When attaching price questions, you can add price component and price break detail. Price component detail enables you to list each component of the item, such as material, shipping, and packaging, so that bidders can respond to the question by entering the price for each component. Price break detail enables you to list quantity ranges so that bidders can respond to the question by entering possible price breaks for each quantity range.

If you do not enter price break detail, bidders will have the opportunity to enter their own quantity ranges and price breaks for your review.

After you finish creating event lines and attaching questions to the lines, you can submit the RFx. The system sends an email or fax to each invited supplier and bidder, depending on their preference, and changes the status of the event to

Posted - Pending. After the event has been posted, you can pause, end, extend, or cancel the event, and the system sends the corresponding message to the invited suppliers and bidders.

See *Managing an Event*.

Understanding Header and Line Question Weighting

When you set up an event, you can choose from two methods of weighting the header question score:

- Assign header weighting
  You assign a percentage for the header score and the system adds it to the total percentages from all of the event lines added together. The combined total of the header percentage and the percentages in the Line Weighting fields for each line must be 100.
- Factor header score into line
  You assign a percentage for the header score and the system adds it to each individual line of the event. The total percentage of each line must be 100.

Example: Assign Header Weighting

Buyer A creates an event with two lines and wants to assign a weight of 20 percent to the header questions. Buyer A wants the header weight to be added to the sum of the two event lines.

The following table describes how Buyer A would set up the event:

Field	Field Value or Setting
Assign Header Weighting	Selected
Factor Header Score Into Line	**20**
Line Weighting for Line 1	**45**
Line Weightingfor Line 2	**35**

In this example, the amount in the Total Question Weight field must be 100 for each line in the event, which means that the question weights for each line must total 100.

Example: Factor Header Score into Line

Buyer B creates an event with two lines and wants to assign a weight of 30 percent to the header questions. Buyer B wants the header weight to be added to each individual event line.

The following table describes how Buyer B would set up the event:

Field	Field Value or Setting
Factor Header Score Into Line	Selected

Field	Field Value or Setting
Header Score Into Line Score	**30**
Line Weighting for Line 1	**45**
Line Weighting for Line 2	**55**

In this example, when Buyer B adds questions to each line, he notices that the system automatically adds a question with a description of **FactorHeaderScoreIntoLine** and a weight of **30** to the list of questions for the line. Buyer B can then choose questions that total to the remaining 70 percent, creating a total of 100 percent for the line.

Forms Used to Create a Request for Quote

Form Name	FormID	Navigation	Usage
Search for Events	W43Q70A	Daily Processing (G43Q11), Event Workbench	View events.
Add/Edit Event	W43Q10A	Click Add RFx on the Search for Events form.	Add a request for proposal or request for quote.
Edit Allowed Currencies For Event	W43Q10C	Click Currencies Allowed on the Add/Edit Event form.	Specify the currencies in which bidders can submit a bid.
Enter Additional Line Information	W43Q10D	On the Add/Edit Event form, click Edit on the line that you want to revise.	Enter line information, such as item reporting and measurement information, and shipment information.
Add New Item	W43Q10E	Click New on a detail line on the Add/Edit Event form.	Add an inventory item that does not already exist in your system.
Search for Parent Items	W43Q101A	Click Copy from BOM on the Add/Edit Event form.	Find and select a BOM from which to copy.
Select BOM Components	W43Q101B	On the Search for Parent Items form, select a BOM from which to copy, and click Select.	Select BOM components to copy into the event.

Form Name	FormID	Navigation	Usage
Search for RFXs	W43Q202A	Click Copy From RFx on the Add/Edit Event form.	Search for an RFx from which to copy.

Adding a Request for Quote

Access the Add/Edit Event form.

1. Complete the following fields:
    - **Business Unit**

      Enter the business unit for which you are creating the sourcing event.
    - **Event Name**

      Enter a name for the sourcing event.
    - **Event Description**

      Enter a description for the sourcing event.
    - **Preview Start Date/Time**

      The system populates this field with the date and time that are specified in the Sourcing Constants program. Change the value in this field if you do not want to use the default start date and time.
    - **Event Start Date/Time**

      The system populates this field with the date and time that are specified in the Sourcing Constants program. Change the value in this field if you do not want to use the default start date and time.
    - **Event End Date/Time**

      The system populates this field with the date and time that are specified in the Sourcing Constants program. Change the value in this field if you do not want to use the default end date and time.

2. Complete the following fields on the Properties tab:

   - **Bid Required**

     Select to specify that bidders must enter a bid amount for all event lines and a bid quantity for all quantity-based lines.
   - **Display Bid Question Weights**

     Select to display the question weights for the bidder.
   - **Display Bid History Page**

     Select to enable bidders to view bid history. If you select this option, bidders will be able to review their responses to an event after submitting their bid.
   - **Line Quantity Required**

     Select to specify that bidders must bid on the exact quantity that is specified for the line.
   - **Sealed Event**

     Select to indicate that the event is sealed, which means that the buyer cannot view bids until after the event has ended.
   - **Allow Manual Extensions**

     Select to allow users to change the event end date and time after the event has been posted.
   - **Award Type**

     Specify whether the winning bidder will be awarded a blanket order or purchase order upon completion of the event.
   - **Terms and Conditions**

     Specify the terms and conditions that the bidder must agree to accept before the bidder can respond to an event. Select a valid code from user-defined code table 40/PM.
3. Complete the following fields on the Scoring tab:

   - **Assign Header Weighting**

     Select to specify that the weighting of the header questions should be added to the total score.
   - **Header Weighting**

     Specify a percentage for the header score weight. This percentage will be added to the total of the percentages in the **Line Weighting** fields, the total of which must be 100 percent.
   - **Factor Header Into Score**

     Select to specify that the header score should be added to the total percentage of each event line.
   - **Header Score into Line Score**

     Specify a percentage for the header score weight. This percentage will be added into the total question percentage for each event line.

4. Complete the following fields on the Payment tab:
   - **Event Currency Code**

     The system uses the currency code of the business unit as the default currency.
   - **Multiple Currency Event**

     Select to allow bids in foreign currencies. If you do not select this check box, the system accepts bids in your company's domestic currency only.
   - **Currencies Allowed**

     Click to access the Edit Allowed Currencies for Event form, where you can specify the currencies that bidders can use for the event. The system displays this link only when you select the **Multiple Currency Event** check box.
   - **Event Payment Method**

     Select the form of payment that you will use upon completion of the event.
   - **Payment Terms**

     Select payment terms for the event. You set up payment terms in the Payment Terms Revisions program.
   - **Tax Exempt**

     Select to indicate to the supplier that you are a tax exempt company.
   - **Tax Exempt ID**

     Enter your tax exemption identification number.
5. Complete the following fields on the Contact Info tab:
   - **Buyer**

     Enter the address book number of the buyer for the event. After you enter the address book number, the system populates the **Contact Name, E-Mail,** and **Phone Number** fields with the information that is associated with the address book number.
6. Enter text as an attachment to the event on the Event Attachments tab.
7. Click Allow Bidder to View Attachment if you want the bidder to be able to view the text that you entered on the Event Attachment tab.
8. Click Invite Bidders to select bidders for the event.

   See *Inviting Bidders*.
9. Click Header Bid Questions if you want to attach header questions to the event. Header questions are not required for RFx events.

   See *Adding Bid Questions to an Event*.
10. Click Copy from RFI to create an RFx from an existing RFI.

    When you copy from an RFI, the system creates header questions based on the header questions that are assigned to the RFI from which you copy.

    See *Copying an RFI*.
11. Click Copy from RFx to create an RFx from an existing RFx.

    See *Copying from an RFx*.

12. Click Copy from BOM to create an RFx from a BOM.

    When you copy from a BOM, the system creates event lines from the components of the BOM.

    See *Copying from a BOM*.
13. To create a detail line for a new item that does not already exist in your inventory, click New in the Event Lines subform.

    See *Adding Ad Hoc Items*.
14. To create a detail line for an inventory item, complete the following fields in the Event Lines subform:

    - **Item Number**

      Specify the number of the item for which you are creating the sourcing event. When you enter an item number, the system populates the **Item Description, Line Type,** and **Commodity Code** fields, based on the setup for that item.

      Leave this field blank if you are entering a line for a service.
    - **Quantity**

      Specify the quantity for the item for which you are creating the sourcing event.
    - **UOM**(unit of measure)

      Specify a unit of measure for the quantity.
    - **Additional Line Info**

      Click the **Edit** link in this field to add additional information for the detail line.

      See *Adding Additional Line Information*.
    - **Event Line Bid Questions**

      When you enter an item number, the system attaches all bid questions for that item number or commodity. If you do not have any questions attached to that item number or commodity, the system attaches the default price question. To edit bid questions for the line, or to add new bid questions, click the **Edit** link in this field.

      See *Adding Bid Questions to an Event*.
15. When you are finished creating the event, click Submit.

Adding Additional Line Information

Access the Edit Additional Line Information form.

Quantity Required
This field is selected if you have entered a quantity for the line. If you have entered a service line, for which no quantity is required, the system clears this field.

Bid Required On Line
Select this option to indicate that for this line, bidders are required to enter a bid. The system does not enable this option if you have already selected the Bid Required option on the Properties tab on the Add/Edit Event form.

Requested Line Quantity Required On Line

Select this option to indicate that for this line, the quantity that the bidder enters must match the line quantity. The system does not enable this option if you have already selected this option on the Properties tab on the Add/Edit Event form.

Quantity/UOM(quantity/unit of measure)
Specify the quantity and the corresponding unit of measure for the item.

Minimum Quantity
Specify a minimum quantity that the bidder can enter for his or her response. The system enables this field only when you do not select the Requested Line Quantity Required On Line option.

Maximum Quantity
Specify a maximum quantity that the bidder can enter for his or her response. The system enables this field only when you do not select the Requested Line Quantity Required On Line option.

Detail Business Unit
Use this field if the business unit for which this item is tracked is different from the business unit for the event.

Commodity Code
Enter a commodity code for the item.

Item Reporting

The system populates these fields using the information that you have set up for each item. Use these fields to change the default item information or to add information for an ad hoc item.

Commodity Class
Enter a code from user-defined code table 41/P1 to represent an item property type or classification, such as commodity type, planning family, and so forth. The system uses this code to sort and process like items. This field is one of six classification categories that are available primarily for purchasing purposes.

Commodity Sub Class
Enter a code from user-defined code table 41/P2 to represent an item property type or classification, such as commodity type, planning family, and so forth. The system uses this code to sort and process like items. This field is one of six classification categories that are available primarily for purchasing purposes.

Supplier Rebate Code
Enter a code from user-defined code table 41/P3 to represent an item property type or classification, such as commodity type, planning family, and so forth. The system uses this code to sort and process like items. This field is one of six classification categories that are available primarily for purchasing purposes

Master Planning Family
Enter a code from user-defined code table 41/P4 to represent an item property type or classification, such as commodity type or planning family. The system uses this code to sort and process like items. This field is one of six classification categories that are available primarily for purchasing purposes.

Landed Cost Rule
Enter a code from user-defined code table 41/P5 to indicate the landed cost rule for an item. The landed cost rule determines purchasing costs that exceed the actual price of an item, such as broker fees or commissions. You set up landed cost rules on the Landed Cost Revisions form.

Item Measurements

The system populates these fields using the information that you have set up for each item. Use these fields to change the default item information or to add information for an ad hoc item.

Weight

Enter the weight of one unit of the item. This value is expressed in the primary unit of measure.

Volume
Enter the cubic units that are occupied by the item. The definition of the unit itself (cubic feet, yards, meters, and so on) is defined in the volume unit of measure.

Line Attachments

Enter additional information for the line. Select the Allow Bidder To View Attachment option if you want bidders to view the additional information that you enter.

Shipment Information

The system populates these fields using the information that you have set up for each item. Use these fields to change the default item information or to add information for an ad hoc item.

Ship To Number
Enter the address number of the location to which you want to ship this order. The address book provides default values for customer address, including street, city, state, zip code, and country.

Requested Date
The system uses the current date as the default date.

Freight Handling
Specify the method by which supplier shipments are delivered. For example, the supplier could deliver to your dock, or you could pick up the shipment at the supplier's dock. You can also use these codes to indicate who has responsibility for freight charges. For example, you can have a code indicating that the customer legally takes possession of goods as soon as they leave the supplier warehouse and is responsible for transportation charges to the destination. Select a valid value from user-defined code table 42/FR.

Mode of Transport
Specify the method that is used to transport goods, for example, by rail, by road, and so on. Select a valid value from user-defined code table 00/TM.

Supplier Remarks
Enter additional text that is applicable to the supplier.

Adding Ad Hoc Items

Access the Add New Item form.

Item Number
Enter a number for the item.

Description
Enter a description for the item.

Line Type
Enter a valid line type for the item. The line type controls how the system processes lines on a transaction and controls the systems with which the transaction interacts, such as General Accounting, Job Cost, Accounts Payable, Accounts Receivable, and Inventory Management. It also specifies the conditions under which a line prints on reports, and it is included in calculations. Examples are:

S: Stock Item

J: Job Cost

N: Nonstock item

Stocking Type
Enter a valid stocking type from user-defined code table 41/I. The stocking type indicates how you stock an item, for example, as finished goods or as raw materials.

G/L Class Code
Enter a code from user-defined code table 41/9. The G/L class code controls which general ledger accounts receive the monetary amount of inventory transactions for this item.

Inventory Cost Level
A code that indicates whether the system maintains one overall inventory cost for the item, a different cost for each branch/plant, or a different cost for each location and lot within a branch/plant. Values are:

1: Item level

2: Item/Branch level

3: Item/Branch/Location level

Location
Enter the storage location in which goods will be received.

Primary Unit of Measure
Enter a value from user-defined code table 00/UM to indicate the primary unit of measure for the item. The primary unit of measure must be the smallest unit of measure in which you handle the item. This is the primary stock accounting unit (PSAU) of measure that the system uses to store all inventory. If you change the primary unit of measure, the conversion factors in the item-level conversion table are no longer valid. The default value for this field is the unit of measure that you specify for the item on Item Master Information.

Purchase Price Level
Specify a code to indicate where to retrieve the purchase price for an item when you enter a purchase order. Values are:

1: Use the supplier/item price from the Purchase Price table (F41061).

2: Use the supplier/item/branch price from the Purchase Price table (F41061).

3: Use the inventory cost from the Inventory Cost table (F4105). This cost is based on the inventory cost level and the purchasing cost method that you specify for the item.

The first two codes are applicable only if you set up supplier costs in the JD Edwards EnterpriseOne Procurement system. If you do not set up supplier costs, the system uses the inventory cost as the default for the purchase order.

> **Note:**
> - *"Setting Up Item Information" in the JD Edwards EnterpriseOne Applications Inventory Management Implementation Guide* .

Copying from an RFx

Access the Search for RFXs form.

1. Click Find to display the RFxs from which you can copy.

2. Select an RFx.
3. Click Display Detail Line on the Search for RFXs form to display the lines that are included in the RFx that you selected.
4. Click Copy Entire Event to copy the event and all attached lines, or select individual lines and click Copy Event and Selected Lines.

Copying from a BOM

Access the Select BOM Components form.

1. To display the full BOM, select Full BOM and then click Redisplay.
2. Click Copy Selected Components.

The system copies the selected components into the event.

Note:

- *"Setting Up Bills of Material" in the JD Edwards EnterpriseOne Applications Product Data Management Implementation Guide* .

Printing an Event

This section provides an overview of the RFx Print report and discusses how to:

- Run the RFx Print report.
- Set processing options for RFx Print.

Understanding the RFx Print Report

If you want to expand your sourcing event to bidders who do not have access to the internet, you can print the event and then fax it to those bidders. The RFx Print report (R43Q110) prints the details of the event, the questions associated with the event, and the event terms and conditions. The RFx Print report also provides space in which bidders can enter their responses to the questions.

After bidders fill out the RFx Print report, they can fax the form back to the buyer, and the buyer can enter the bidders' responses for them.

Running the RFx Print Report

Select Daily Processing (G43Q11), RFx Print.

Setting Processing Options for RFx Print (R43Q110)

These processing options specify default processing information for the report.

Event Header

1. Print Invited Bidder List

Specify whether to print a list of all bidders who were invited to the event on the report. You would typically select this option if the buyer wants a printed copy of the event.

Header Question

1. Weight Allowed

Specify whether to print the weight that is associated with each header question.

2. Range Allowed

Specify whether to print the range that is associated with each header question.

Detail Line Question

1. Weight Allowed

Specify whether to print the weight that is associated with each detail line question.

2. Range Allowed

Specify whether to print the range that is associated with each detail line question.

Managing an Event

This section provides an overview of event management and discusses how to:

- Pause, resume, cancel, or end an event.
- Extend an event.

Understanding Event Management

Use the Event Workbench program (P43Q70) to manage sourcing events. The Event Workbench enables you to perform the following actions for the event:

- Pause and resume the event.
- Cancel the event.
- Extend the event.
- End the event.

The current status of the event determines the actions that you can perform for the event. For example, you cannot extend events that have already reached their end time. When you select an event on the Search for Events form, the system enables the corresponding buttons for the actions that you can take for that event.

For each action that you perform for an event, the system sends an email message or fax to the suppliers, depending on their preferences, notifying them of the change in event status. The system uses the print messages that you specify in the Sourcing Constants program (P43Q90) when determining which message to send.

See *Understanding System Setup for Operational Sourcing*.

Forms Used to Manage an Event

Form Name	FormID	Navigation	Usage
Search for Events	W43Q70A	Daily Processing (G43Q11), Event Workbench.	Review, pause, resume, cancel, extend, and end events.
Extend Event Time	W43Q70C	Click Extend Event on the Search for Events form.	Extend the event to a later date or time.

Pausing, Resuming, Canceling, or Ending an Event

Access the Search for Events form.

Perform one of the following actions on the Search for Events form:

- Click Pause in the Action field.
- Click Resume in the Action field.
- Click Cancel Event.
- Click End Event.

Extending an Event

Access the Extend Event Time form.

1. Enter a new date or time in the Event End Date/Time field.
2. Click Save and Close.

5 Analyzing Events and Awarding Bids

Analyzing Events

This section provides overviews of event analysis for requests for information and event analysis for requests for quote and discusses how to:

- Analyze a request for information.
- Analyze event summary information.
- Analyze responses to header questions.
- Analyze responses to line questions.
- View price components and price breaks.
- Add bid questions.
- Modify ideal responses.
- Modify responses.
- Score text questions.

Understanding Event Analysis for Requests for Information

Use the Analyze Event form, which you access from the Event Workbench program (P43Q70), to analyze both requests for information (RFIs) and requests for quotes (RFxs).

The event analysis process for an RFI involves reviewing and comparing the responses from bidders to the header questions that are attached to the event to determine the bidders with whom you want to conduct business. For each question, you can toggle between viewing bidders' scores and viewing their responses. You can also change the weights that are associated with each question and then review how the score for each bidder changes.

The Analyze Event form provides further options for event analysis by enabling you to add new questions to the event and enter responses on behalf of the bidders. You can also change bidders' responses to existing questions and change ideal responses. You can either save the new responses and resulting scores or discard the changes to preserve the original responses.

If an event includes text questions, you can assign scores to the responses of each bidder. As you assign scores to each response, the system adds them to the total scores for each bidder.

Understanding Event Analysis for Requests for Quotes

The event analysis process for an RFx involves reviewing and comparing responses to determine the bidder or bidders from whom you want to purchase the items in your event. You can begin reviewing the responses from bidders as soon as they submit their bids. However, if the event is sealed, you cannot review responses until the event has ended.

When you analyze an RFx, the Analyze Event form provides several different views of event information, including:

- Event summary information

This view displays the total bid amount, the total score, the total score and weight for each line, and the header score. The system displays this information for each bidder.

- Event header information

  This view displays the header questions for the event and the responses from each bidder. This view also displays the weight for each header question. You can toggle between viewing the bid amounts and viewing the bid scores. You can view responses to header questions from only three bidders at a time, but you can select a single question and view the responses from all bidders for that question by clicking the View All Responses button.

- Event line information

  This view displays each line for the event and the questions that are associated with each line. The system displays only one line at once, and displays the responses for each question. If the price question that is associated with the line contains price breaks or price components, the system displays the break and component information and the bidders' responses to that information. You can view responses to line questions from only three bidders at a time, but you can select a single question and view the responses from all bidders for that question by clicking the View All Responses button.

When analyzing an RFx, you have the same analysis options that you do when analyzing an RFI: you can change question weights, add new questions and respond to the new questions on behalf of bidders, modify ideal responses, and modify bidders' responses to existing questions. You can perform all of these actions for both header and line questions.

You can change the price question for a line, but you cannot add a new price question.

Forms Used to Analyze Events

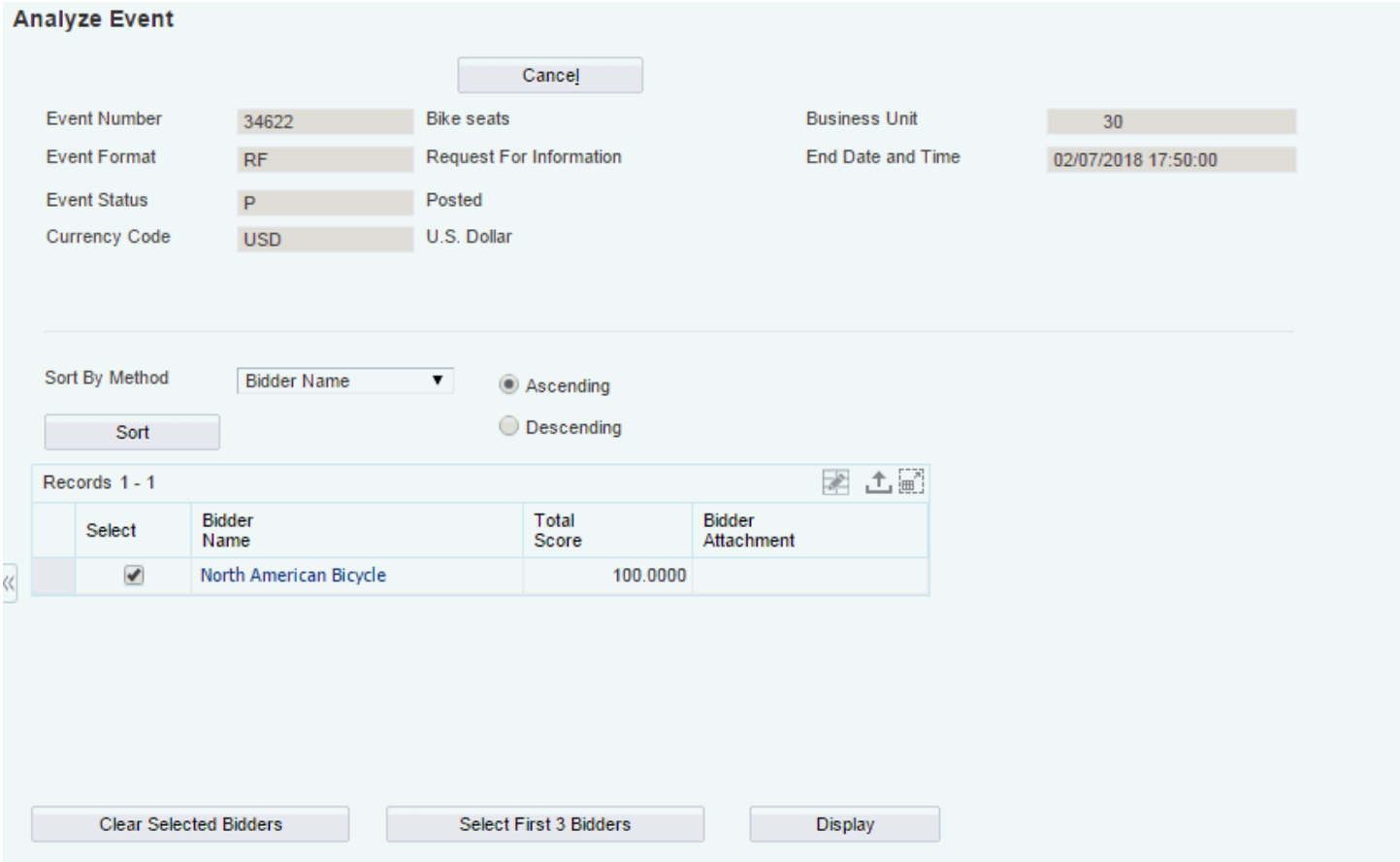
Form Name	FormID	Navigation	Usage
Search for Events	W43Q70A	Daily Processing (G43Q11), Event Workbench	Search for the event that you want to analyze.
Analyze Event	W43Q50B	On the Search for Events form, select the event that you want to analyze, and click Analyze.	Perform event analysis.
Analyze Bidder Info	W43Q50C	Click the link for the bidder in the Bidder Name field on the Analyze Event form.	Review bidder information, such as mailing address, phone number, and email address.
Analyze Item/Service Inquiry	W43Q50D	Click RFx Line on the Analyze Event form, and then click the link for the item next to the Description field.	View item information, such as Item Number (Short), Item Line Type, and Stocking Type.

Form Name	FormID	Navigation	Usage
Create Event Question	W43Q20E	Select either the RFx Header link or the RFx Line link on the Analyze Event form, and then select either Add Questions or Modify Ideal.	Add questions to the event or modify the ideal answer for an event question.
Edit/View Text Responses	W43Q52C	Select either the RFx Header link or the RFx Line link on the Analyze Event form, and then select Modify Responses.	Enter or modify bidders' responses to a text question.
View/Edit Price Responses	W43Q52D	Select either the RFx Header link or the RFx Line link on the Analyze Event form, and then select Modify Responses.	Enter or modify bidders' responses to a price question.
View/Edit Monetary Responses	W43Q52E	Select either the RFx Header link or the RFx Line link on the Analyze Event form, and then select Modify Responses.	Enter or modify bidders' responses to a monetary question.
View/Edit Date Responses	W43Q52F	Select either the RFx Header link or the RFx Line link on the Analyze Event form, and then select Modify Responses.	Enter or modify bidders' responses to a date question.
View/Edit Numeric Responses	W43Q52G	Select either the RFx Header link or the RFx Line link on the Analyze Event form, and then select Modify Responses.	Enter or modify bidders' responses to a numeric question.
View/Edit Yes or No Responses	W43Q52H	Select either the RFx Header link or the RFx Line link on the Analyze Event form, and then select Modify Responses.	Enter or modify bidders' responses to a yes/no question.
View/Edit List Responses	W43Q52I	Select either the RFx Header link or the RFx Line link on the Analyze Event form,	Review bidders' responses to a list question, and access the List of Values form.

Form Name	FormID	Navigation	Usage
		and then select Modify Responses.	
List of Values	W43Q52J	Click Edit on the View/ Edit List Responses form.	Enter or modify bidders' responses to a list question.
Score Text Question Revision	W43Q51A	Click Score Text Questions on the Analyze Event form.	Assign scores to responses to text questions.

Analyzing a Request for Information

Access the Analyze Event form.



Sort by Method

Select a value to specify the method by which the system sorts the bidders who have responded to the event.

Ascending and Descending

Click one of these options to specify the order in which the system sorts the bidders.

Sort
Click this button after selecting a value in the Sort by Method field and either the Ascending option or the Descending option to change how the system displays the bidders.

Bidder Name
Click the link in this field to view the address information for the bidder or supplier.

Clear Selected Bidders
Click to clear the bidders that you have selected. After you select new bidders, you must click Display for the system to update the Bid Line Information subform with the information for the selected bidders.

Select First 3 Bidders
Click to have the system select the first three bidders. After clicking this button, you must click Display for the system to update the Bid Line Information subform with the information for the first three bidders.

Weight
Specify a percentage to evaluate event lines by different weights.

Recalculate Scores
Click this button after entering a value in the Weight field to recalculate the bidders' scores based on new question weights.

View All Responses
Click this button to view the responses of all invited bidders for a particular question.

Score Text Questions
Click this button to assign scores to the answers of header text questions.

Select Add Questions to add additional header questions to the RFI.

See *Adding Bid Questions*.

Select Modify Ideal to change the ideal response for a header question.

See *Modifying Ideal Responses*.

Select Modify Responses to change bidders' responses to the header questions, or to enter responses on behalf of bidders for questions that you added to the event during analysis.

Click this button after you have selected Add Questions, Modify Ideal, or Modify Responses.

Save
Click to save the results that are created by changing question weights, adding questions, and modifying responses.

Advance Status
Click this button after you have completed your analysis of the RFI. The system advances the status of the RFI to **RFI Reviewed.**

Analyzing Event Summary Information

Access the Analyze Event form, and click the RFx Summary link.

Use the RFx Summary form to review the bidders that responded to your event and their total scores and bid amounts.

Sort by Method

Select a value in this field to specify the method by which the system sorts the bidders who have responded to the event.

Ascending and Descending
Click one of these options to specify the order in which the system sorts the bidders.

Sort
Click this button after selecting a value in the Sort by Method field and either the Ascending option or the Descending option to change how the system displays the bidders.

Bidder Name
Click the link in this field to view the address information for the bidder or supplier.

Clear Selected Bidders
Click this button to clear the bidders that you have selected. After you select new bidders, you must click Display for the system to update the Bid Line Information subform with the information for the selected bidders.

Select First 3 Bidders
Click this button to have the system select the first three bidders. After clicking this button, you must click Display for the system to update the Bid Line Information subform with the information for the first three bidders.

Weight
Specify a percentage to evaluate event lines by different weights.

Recalculate
Click this button after entering a value in the Weight field to recalculate the bidders' scores based on new line weights.

Analyzing Responses to Header Questions

Access the Analyze Event form, and click the RFx Header link.

Use the RFx Header view to review total scores, total header scores, and responses to header questions.

View All Responses
Click to view the responses of all invited bidders for a particular question.

Score Text Questions
Click to assign scores to the answers of header text questions.

Add Questions
Select to add a header question to the event.

Modify Ideal
Select to change the ideal response for a header question.

Modify Responses
Select to change bidders' responses to header questions.

Analyzing Responses to Line Questions

Access the Analyze Event form, and click the RFx Line link.

Use the RFx Line view to review total bid amounts, total scores, total line scores, and responses to line questions.

Event Line Number
Enter the number of the event line that you want the system to display. After you enter a line number, you must click Select.

Description
Click the link next to this field to view information for the item, such as the item number (short), primary UOM, item line type, and stocking type.

Requested
Change this date to a date that is after the current system date. The system prevents you from posting an award when the requested date is before the system date.

Analyze Quantity
Change the quantity for the event line to analyze bidder scores and amounts using a different quantity.

View All Responses
Click to view the responses of all invited bidders.

Score Text Questions
Click to assign scores to the answers of line text questions.

Add Questions
Select to add a line question to the event.

See *Adding Bid Questions*.

Modify Ideal
Select to change the ideal response for a line question.

See *Modifying Ideal Responses*.

Modify Responses
Select to change bidders' responses to bid questions.

See *Modifying Responses*.

Viewing Price Components and Price Breaks

Access the Analyze Event form.

Expand the node for the price question to view responses to price breaks and components.

Adding Bid Questions

Access the Analyze Event form, and click either the RFx Header link or the RFx Line link.

Scroll down to the lower right corner of the Analyze Event form, and select Add Questions from this menu.

> **Note:** You cannot add price questions during event analysis.

Click this button after selecting Add Questions to display the Create Event Question form.

1. Add a bid question, and then click Save and Close.

   See *Setting Up Bid Question Templates*.
2. Enter responses to the question on behalf of the bidders.

   See *Modifying Responses*.
3. After you enter responses on behalf of the bidders, click Recalculate Scores on the Analyze Event form

Modifying Ideal Responses

Access the Analyze Event form.

Scroll down to the lower right corner of the Analyze Event form, and select Modify Ideal from this menu.

Click this button after selecting Modify Ideal to display the Create Event Question form.

1. Modify the ideal answer, and then click Save and Close.
2. On the Analyze Event form, click Recalculate Scores.

Modifying Responses

Access the Analyze Event form.

Scroll down to the lower right corner of the Analyze Event form, and select Modify Responses from this menu.

Click this button after selecting Modify Responses to display the Create Event Question form.

Depending on the type of question for which you want to modify responses, the system displays one of seven forms. This form appears when you modify responses to a list question.

1. Modify responses to the question, and then click Save and Close to save the new responses and scores or click Cancel if you want to preserve the original responses.
2. Click Recalculate Scores on the Analyze Event form.

Scoring Text Questions

Access the Score Text Question Revision form.

Enter a score in the Response Score field, and click Save and Close. The system adds the scores to the total score for the line.

Awarding Bids

This section provides an overview of awarding bids and discusses how to:

- Award a bid at the event header level.

- Award a bid at the event line level.
- Post an award.

Understanding Awarding Bids

After you have analyzed an event and have determined the bidder or bidders to whom you want to award the bid, you can award the bid and then post the award. When you post the award, the system sends a message using the preferred contact method to the awarded bidders and creates either a purchase order or blanket order, depending on how you set up the event.

You use the Analyze Event form to award a bid and post an award. You can award a bid at either the header level or the line level. If you award a bid at the header level, you specify a percentage amount for the bid. For example, you can award 50 percent of the event to one bidder and 50 percent to another. If you award a bid at the line level, you can specify either a percentage amount or a quantity.

After awarding a bid and posting the award, you must click Complete on the Analyze Event form so that the system can advance the status of the event to **Awarded.**

Forms Used to Award Bids

Form Name	FormID	Navigation	Usage
Search for Events	W43Q50B	Daily Processing (G43Q11), Event Workbench	Search for the event that you want to analyze.
Analyze Event	W43Q50B	On the Search for Events form, select the event that you want to analyze, and click Analyze.	Award a bid at the event header level. Award a bid at the event line level. Post an award.

Awarding a Bid at the Event Header Level

Access the Analyze Event form.

1. Click the RFx Header link.
2. Complete the Award Action field for one or more bidders.
3. Complete the Percent Award field for one or more bidders.

Awarding a Bid at the Event Line Level

Access the Analyze Event form.

1. Click the RFx Line link.
2. Complete the Award Action field for one or more bidders.
3. Complete either the Percent Award field or the Award Quantity field for one or more bidders.

Posting an Award

Access the Analyze Event form.

Click the Bidder Award link.

1. In the Bidder Award - Bidder Selection subform, choose the supplier for which you want to post an award and click Select Bidder.

   The system displays the Bidder Award - Bidder Selection subform.
2. In the Bidder Award - Post Award subform, review the information and, if necessary, change any of the following fields:

   - Buyer
   - PO Business Unit
   - Award Currency
   - Freight Handling Code
3. Select one or more of these options, which determine the information that bidders can view in the Bid History program (P43Q41):

   - Display Award Details
   - Display All Bids
   - Display Bid Scores
   - Display Total Bid Price
   - Display Bid Questions
4. Click Post Award.

   The system creates a purchase order or blanket order, depending on the properties of the event, and then populates the Award Document field with the document number.
5. Click Complete to advance the status of the event to **Awarded.**

6 Responding to Events

Understanding Event Response

When bidders receive a fax or email notifying them that they are invited to an event, they access the Bidder Workbench to register for the event, accept or decline the invitation, preview the event, and respond to the event questions. Bidders and suppliers access the Bidder Workbench from the Bidder/Supplier SRM Portal.

If bidders have not yet participated in an event with your company, the system prompts them to first register by entering company information, which includes entering a currency code and payment terms. Bidders need to enter company information only once; they will not have to enter the information for the next event to which they are invited.

After they register for the event, bidders can then accept or decline the invitation to the event. To accept an invitation, bidders must agree to the event terms and conditions. To decline an invitation, bidders must select a reason code for declining, but they can select an option to receive updates about the event.

Managing User Profiles

This section provides overviews of the Sourcing Bidder Portal program and the User Profile Self Service program and discusses how to:

- Add user profiles
- Edit user roles
- Revise passwords

Understanding the Sourcing Bidder Portal Program

You can provide bidders and suppliers with access to your company's portal using the Sourcing Bidder Portal program (P43Q01). Bidders and suppliers use the Bidder Workbench link on your company's portal to respond to questions included in sourcing events. In addition to accessing the Bidder Workbench, bidders and suppliers can also manage their user profiles using one of two links. Form-level security determines the links to which bidders and suppliers have access. Bidders have access only to the Change Password link, and can only change their passwords. Suppliers have access to the Change Password link and also the Manage User Profiles link. The Manage User Profiles link enables suppliers to create, edit, and delete user profiles, change passwords, and edit user roles.

Understanding the User Profile Self Service Program (P0092SS)

Both the Change Password and the Manage User Profiles links access the User Profile Self-Service program (P0092SS). When suppliers click the Manage User Profiles link, they can select only the role to which they are assigned, and they can view only the user profiles that are attached to their address book record. When suppliers create new user profiles, the system attaches their address book number to the new user profiles.

You can use the tasks discussed in this chapter to provide instructions to your bidders and suppliers on how to change their passwords and manage their user profiles.

> **Note:** The P0092SS program should not be used by JD Edwards EnterpriseOne users who are internal to your company. All tasks related to managing user profiles for internal users should be managed by a system administrator using the Work With User / Role Profiles program (P0092).

See *JD Edwards EnterpriseOne Tools Security Administration Guide* .

Forms Used to Manage User Profiles

Form Name	FormID	Navigation	Usage
View Company Users	W0092SSA	Click the Manage User Profiles link on the Sourcing Bidder Portal.	Locate user IDs to revise. This form is accessible only to suppliers
User Profile and Preferences	W0092SSC	Click Add or Edit on the View Company Users form.	Add user profiles or edit existing user profiles. This form is accessible only to suppliers.
Manage Users Role Relationships	W0092SSB	Click the Search button in the Role field on the User Profile and Preferences form.	Add or edit roles for users. This form is accessible only to suppliers.
Administrative Password Revisions	W0092SSE	Suppliers: Click the Revise Password on the View Company Users form. Bidders: Click the Change Password link on the Sourcing Bidder Portal.	Revise passwords.
Role Search and Select	W0092SSF	Click the Search button in the Assigned Role field on the User Profile and Preferences form.	Select a role for the user profile.
Delete Confirmation	W0092SSG	Click Delete on the View Company Users form	Click OK to confirm that you want to delete the user profile.

Adding User Profiles

Access the User Profile and Preferences form.

1. Complete the following fields:
    - **User ID**

      Enter a unique value to identify the user profile.
    - **Who's Who LineID**

      Enter the line identification number of the who's who record to which this user profile corresponds.
    - **Language**

      Select a language preference from user-defined code (UDC) table 01/LP to specify the language to use on forms and printed reports. Before you specify a language, a code for that language must exist at either the system level or in your user preferences.
    - **Justification**

      If you have selected **Arabic** in the **Language** field, select an option to determine the order in which to read text.
    - **Set Accessibility Mode**

      Select **Yes** to enable accessibility mode for the user. If you select this option, the system enables the JD Edwards EnterpriseOne web client to be fully accessible through the JAWS screen reader software for visually impaired users. This option is set to **No** by default when a user profile is created.
    - **Date Format**

      Specify the format of a date as it is stored in the database.
    - **Date Separator Character**

      Specify the character to use when separating the month, day, and year of a given date. If you enter an asterisk (*), the system uses blank for the date separator. If you leave the field blank, the system uses the system value for the date separator.
    - **Decimal Format Character**

      Specify the number of positions to the right of the decimal you want to use. If you leave this field blank, the system value is used as the default.
    - **Country**

      Specify the country in which the user resides. The system displays country-specific forms based on this value.
    - **Time Zone**

      Specify a code to associate a time zone with a user's profile. This code represents the user's preferred time zone, and it must be a valid value from UDC table (H91/TZ).
    - **Time Format**

      Specify the user's preferred format for time-of-day.
    - **Daylight Savings Rule**

Specify a value identifying a daylight savings rule. Use daylight savings rules to adjust time for a geographic and political locale.

- **New Password and Verify Password**

  Enter the user password that JD Edwards EnterpriseOne uses to validate during the sign on process. Use the following guidelines:

  - The new password cannot be the same as the old password.
  - The new password cannot be the same as the user ID.
  - The new password must be at least six characters in length.

  System administrators using Administrative Password Revisions to reset a user's password are not restricted by these rules. Often, standards exist for resetting a forgotten password. For example, a new password reset by a system administrator may need to be the same as the user ID or it may simply be the word "password" each time. Regardless, the new value specified in this field will become effective when the user signs on to JD Edwards EnterpriseOne for the next time.

- **Security Access**

  Specify whether the user profile is active.

2. To assign user roles, click the search button in the Role field.
3. On the Manage User's Role Relationship form, select the role to assign to the user.
4. Click Assign.
5. Click Close.
6. On the Use Profile and Preferences form, click Close.

Editing User Roles

Access the Manage User's Role Relationships form.

1. Select the role to assign to or remove from the user ID.
2. Click Assign or Remove.
3. Click Close.

Revising Passwords

Access the Administrative Password Revisions form.

1. Enter and verify a new password.
2. Click Submit.

Registering for an Event

This section discusses how to enter registration information.

Form Used to Enter Registration Information

Form Name	FormID	Navigation	Usage
Company Information	W43Q95A	Click Bidder Workbench on the Bidder/Supplier SRM Portal.	Register for an event.

Entering Registration Information

Access the Company Information form.

Currency Code
Specify the currency in which amounts are stored in the JD Edwards EnterpriseOne Address Book system. For example, the credit limit, invoiced this year, invoiced prior year, and so on. The currency that you specify is used to record and store transaction history.

Payment Terms
Select the payment terms to be used as the default payment terms. Payment terms determine the due date, discount amount, and discount due date that the system assigns when you create an invoice.

Address Book Self Services
Click this link to revise contact information, user profile information, and company information.

See *"Using the Address Book Self Service Program" in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide* .

See *"Using the Contacts Self Service Program" in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide* .

Working with Events

This section provides an overview of working with events and discusses how to work with events.

Understanding How to Work with Events

Bidders and suppliers use the Search for Events form in the Bidder Workbench program to work with events. The Search for Events form displays all events in which they have participated and all events in which they are currently participating. Using this form, bidders and suppliers can respond to events, access bid history, and update address book information.

Form Used to Work with Events

Form Name	FormID	Navigation	Usage
Search for Events	W43Q40A	Click Bidder Workbench on the Bidder/Supplier SRM Portal.	Work with events.

Working with Events

Access the Search for Events form.

Accepting or Declining an Event Invitation

This section discusses how to:

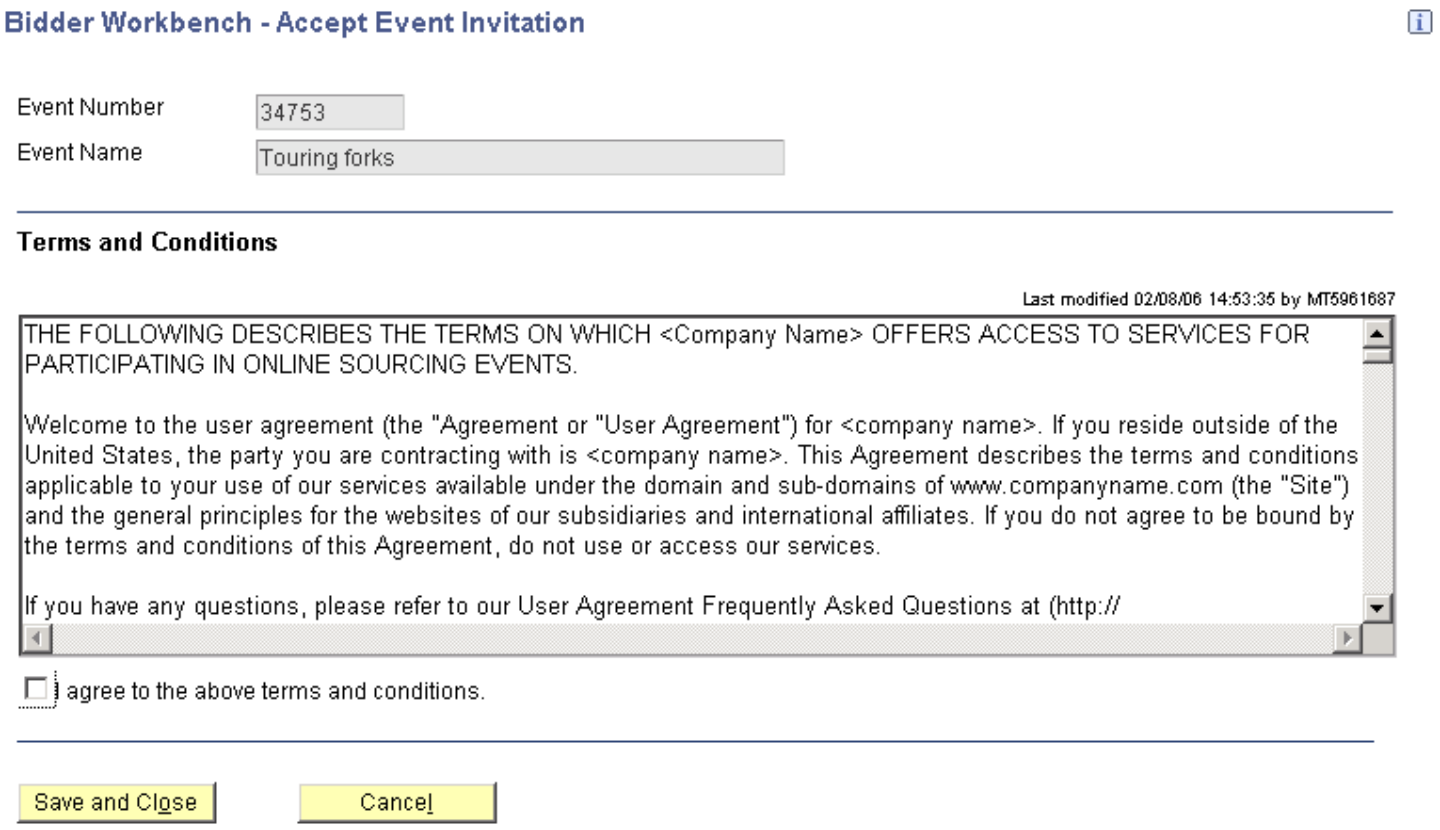
- Accept an invitation.
- Decline an invitation.

Forms Used to Accept and Decline Event Invitations

Form Name	FormID	Navigation	Usage
Search for Events	W43Q40A	Click Bidder Workbench on the Bidder/Supplier SRM Portal.	Accept or decline an event invitation.
Decline Event Invitation	W43Q40D	Click Decline on the Search for Events form.	Decline an event invitation.
Accept Event Invitation	W43Q40E	Click Respond on the Search for Events form.	Accept an event invitation.

Accepting an Event Invitation

Access the Accept Event Invitation form.

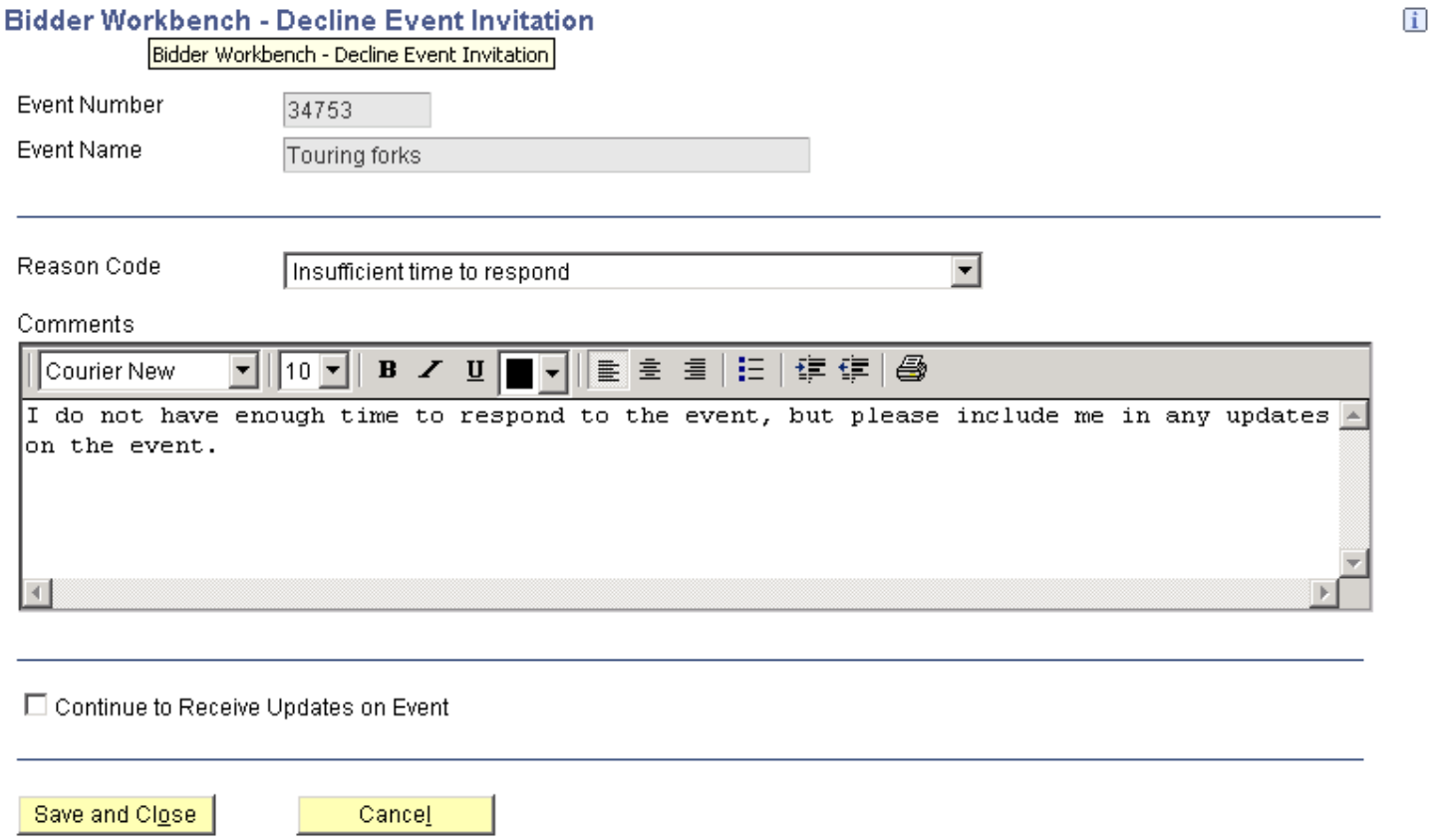


Terms and Conditions
Review the terms and conditions for the event.

I agree to the above terms and conditions.
Select this option to agree to the terms and conditions of the event.

Declining an Event Invitation

Access the Decline Event Invitation form.



Reason Code
Select a reason for declining the invitation. The system stores valid reason codes in user-defined code table 43Q/DR.

Comments
Enter text to provide a further explanation for declining the invitation.

Continue to Received Updates on Event
Select this option to inform the buyer that you would like to continue to receive updates on the sourcing event.

Previewing an Event

This section provides an overview of the event preview process and discusses how to preview an event.

Understanding the Event Preview Process

The event preview process enables bidders to review information about the event before it begins. During event preview, bidders can review the event name and description, obtain contact information for the buyer, and review all questions for the event. Bidders can only view the bid questions; they cannot respond to them.

After previewing an event, bidders may decide that they no longer want to participate in the event. They can decline their invitation, thus removing themselves from the list of bidders.

Forms Used to Preview an Event

Form Name	FormID	Navigation	Usage
Search for Events	W43Q40A	Click Bidder Workbench on the Bidder/Supplier SRM Portal.	Search events and select the event that you want to preview.
Bidder Response	W43Q45A	Click the link in the Event Number field on the Search for Events form.	Review overview information for the event.

Previewing an Event

Access the Bidder Response form.

When the event is in a status of **Preview,** you can only view the bid questions; you cannot respond. If you need to contact the buyer, click the Email Buyer link.

Responding to an Event

This section provides an overview of event response and discusses how to:

- Respond to an event.
- Enter bidder price breaks.
- Enter buyer price breaks.
- Enter price components.
- Select values for a list question.
- Submit a bid.

Understanding Event Response

After an event starts, bidders can access the Bidder Response form and begin the process for submitting a bid. If the event contains both header and detail questions, the Bidder Response form contains these tabs: Event, Company, and Product/Service. The Company tab provides access for answering header-level questions, which are questions about your company, and the Product/Services tab provides access to the event lines and the associated detail-level questions.

As bidders click each line for the event, the system displays the corresponding questions for that line. For each question, the system indicates whether a response is required and whether the bidder has responded to the question. The system updates the Responded field after the bidder has selected a response and then selected the next question.

If the buyer has entered price break information, the system displays the Buyer Price Breaks link, which bidders can use to enter applicable price breaks for the ranges specified by the buyer. If the buyer did not attach price break information to the price question, the system displays the Bidder Price Breaks link, which bidders can use to enter their own quantity ranges and applicable price breaks.

If the buyer has entered price component information, the system displays the Enter Price Components link. When bidders click this link, the system displays a form on which bidders must enter the price for each component, such as shipping, labor, and parts, of an item.

When bidders are finished responding to an event, they click Review and Submit to access the Review and Submit form. This form enables bidders to review and then submit their bids.

Forms Used to Respond to an Event

Form Name	FormID	Navigation	Usage
Search for Events	W43Q40A	Click Bidder Workbench on the Bidder/Supplier SRM Portal.	Search events and select the event for which you want to respond.
Bidder Response	W43Q45A	Click Respond on the Search for Events form.	Review overview information for the event.
Ship To Address	W43Q411C	Click the link in the Ship To field.	View the address to which the item should be shipped.
Enter Price Breaks	W43Q412A	Click Bidder Price Breaks or Buyer Price Breaks on the Bidder Response form.	Enter bidder or buyer price breaks.
Enter Price Components	W43Q413A	Click Price Components on the Bidder Response form.	Enter price component information.
Select from a List of Values	W43Q402C	Click Select from a list of values on the Bidder Response form.	Select one value from a list of possible values.
List of Values	W43Q414D	Click Select from a list of values on the Bidder Response form.	Select multiple values for a list question.

Form Name	FormID	Navigation	Usage
Bidder Response Revisions	W43Q75A	Click Review and Submit on the Search for Events form.	Review and submit a bid.

Responding to an Event

Access the Bidder Response form.

1. Select an event line and complete the following fields for that line:
    - **Bid Quantity**

      If the properties of this event indicate that you must bid on the quantity specified by the buyer, this field displays the specified quantity but it is disabled. If the properties do not indicate that you must bid on the quantity specified by the buyer, this field is blank.
    - **Promised Delivery Date**

      Specify the date by which you plan to deliver the item.

      > **Note:** If this date is in the past when you post an award for this supplier, the system does not allow you to create a purchase order.
    - **Bid Amount**

      The system displays the bid amount, which is calculated using the price question response multiplied by the quantity.
    - **Event Quantity**

      The system displays the total quantity for the event.
    - **Min Bid Quantity**(minimum bid quantity)

      The system displays the minimum quantity for which bidders can submit a response. The system displays a value in this field only when the buyer has set up the event line to allow a quantity range instead of a specific quantity.
    - **Max Bid Quantity**(maximum bid quantity)

      The system displays the maximum quantity for which bidders can submit a response. The system displays a value in this field only when the buyer has set up the event line to allow a quantity range instead of a specific quantity.
    - **Request Date**

      The system displays the date on which the event was created.
    - **Bid Required**

      The system displays either **Yes** or **No,** depending on how the buyer set up the event.
    - **Buyer Attachments**

      Click **View** to review attachments that the buyer added to the event line.
    - **Ship To**

      Click the link in this field to view the address to which you should ship the item.
    - **Mode of Transport**

The system displays the mode of transport, which the buyer enters when creating the event. The mode of transport describes the nature of the carrier being used to transport goods, for example, by rail, by road, and so on. The system stores valid values for this field in user-defined code table 00/TM.

- **Freight Handling Code**

  The system displays the method by which supplier shipments are delivered, which the buyer enters when creating the event. Examples include: the bidder delivers to the buyer's dock, or the buyer picks up the shipment at the bidder's dock. The system stores valid values for this field in user-defined code table 42/FR.

2. Review and respond to each question attached to the selected event line.
3. To toggle between questions, click Next Question, Previous Question, or select the grid row for the question to which you want to respond.
4. Click Email Buyer if you want to contact the buyer for additional information.
5. Click Attachments to add additional information to your response.
6. When you are finished responding to the questions, click Review and Submit if you want to submit your bid. To save your responses and submit at a later time, click Save and Close.

See *Submitting a Bid*.

Entering Bidder Price Breaks

Access the Enter Price Breaks form.

Enter the quantities and corresponding prices at which the buyer can receive a price break. When you are finished, click Save and Continue.

Note: You must enter price breaks in ascending order in the grid rows.

Entering Buyer Price Breaks

Access the Enter Price Breaks form.

Enter prices for the quantities defined by the buyer and then click Save and Close.

Entering Price Components

Access the Enter Price Components form.

Enter a price for each component and then click Save and Close.

Selecting Values for a List Question

Access the List of Values form if the question allows only one response or the Select from a List of Values form if the question allows multiple responses .

Select values from the list and then click Close.

The system allows you to select more than one value only when the Allow Multiple Selection option for the list question is selected.

Submitting a Bid

Access the Bidder Response Revisions form.

Click Submit to submit your final bid or click Cancel to return to the Bidder Response form.

Note: You must respond to all required questions before you click Submit, or the system generates an error.

Reviewing Bid History

This section provides an overview of bid history review and discusses how to review bid history.

Understanding Bid History Review

If the buyer has selected the Display Bid History Page option for the event, bidders can review their bid history after submitting their bid. Bidders cannot change any of their responses when reviewing their history, but they can contact the buyer if they need additional information.

Forms Used to Review Bid History

Form Name	FormID	Navigation	Usage
Search for Events	W43Q40A	Click Bidder Workbench on the Bidder/Supplier SRM Portal.	Search for the event that you want to preview.
Bid History	W43Q41D	Click View in the Bidder History field on the Search for Events form.	Review lines and click View Response.

Form Name	FormID	Navigation	Usage
Bidder Response form	W43Q45A	Click View Response on the Bid History form.	Review overview information for the event.

Reviewing Bid History

Access the Bid History form.

Review event information. To review more detailed information or to review responses to questions, click View Response on the Overview and Questions form.

Responding on Behalf of Bidders

This section provides an overview of responding on behalf of bidders and discusses how to respond on behalf of bidders.

Understanding How to Respond on Behalf of Bidders

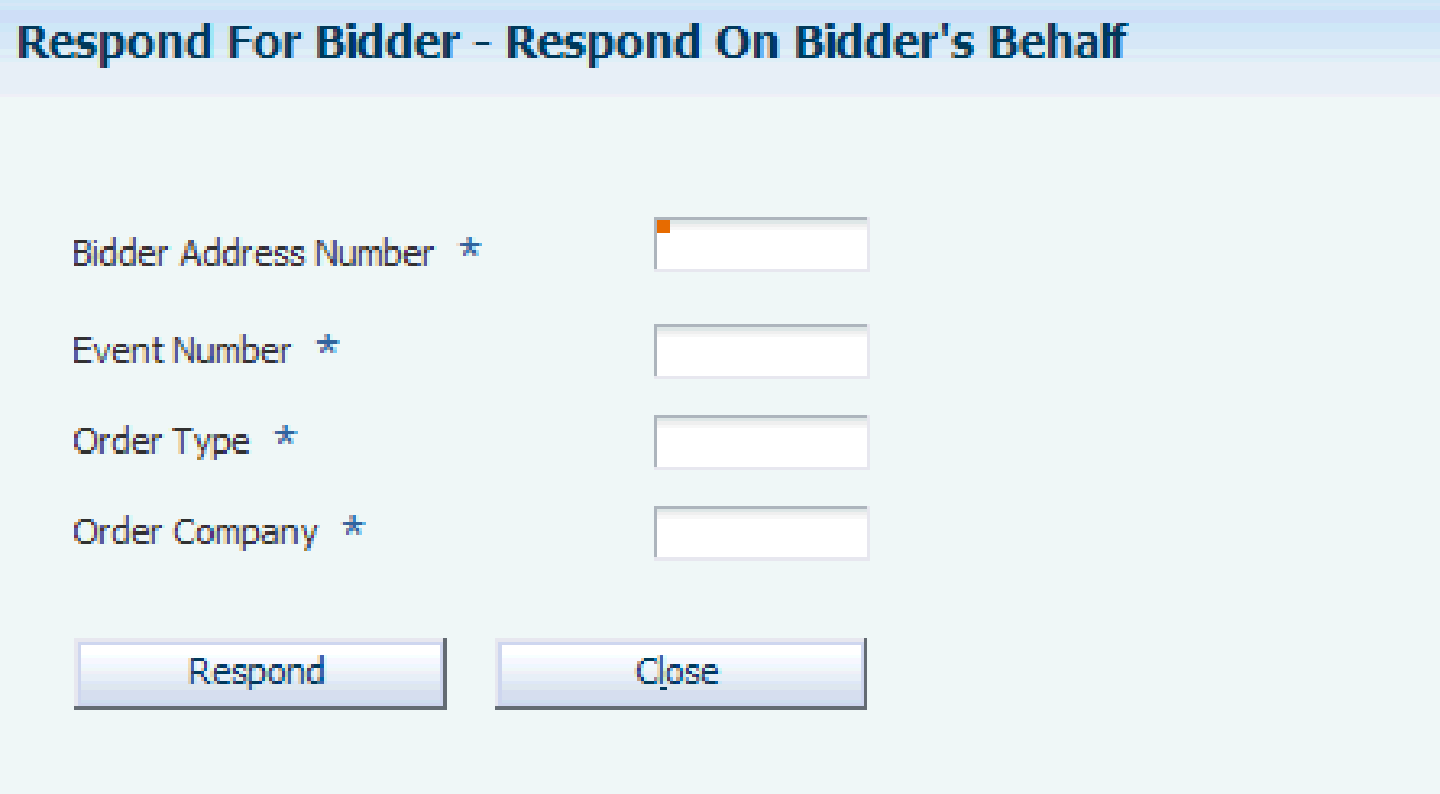
To expand your event to bidders who do not have access to the internet, you can fax an event to bidders and then respond on behalf of those bidders. You use the Respond For Bidders program (P43Q47) to respond on behalf of bidders. This program enables you to specify a bidder number, event number, order type, and order company to locate the event for which you want to enter responses. After you specify this information, you click Respond, and the system displays the Bidder Response form.

Form Used to Respond on Behalf of Bidders

Form Name	FormID	Navigation	Usage
Respond On Bidder's Behalf	W43Q47A	Select Daily Processing (G43Q11), Respond For Bidders.	Enter responses to an event on behalf of a bidder.

Responding on Behalf of Bidders

Access the Respond On Bidder's Behalf form.



Updating Address Book Information

This section provides an overview of updating information in the JD Edwards EnterpriseOne Address Book system and discusses how to update address book information.

Understanding JD Edwards EnterpriseOne Address Book Updates

In addition to responding to events, bidders and suppliers can update their own address book information. Suppliers can update company information, supplier master information, and user profile information, and they can add, delete, and modify existing contact information. Bidders can modify company information and user profile information, and they can modify and delete existing contact information.

See *"Using the Address Book Self Service Program" in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide* .

Form Used to Update Address Book Information

Form Name	FormID	Navigation	Usage
Update Address Book Record	W01012SSA	If you are a bidder, click Address Book Self Services on the Company Information form or click Modify in the Event Bidder Contact field on the Search for Events form. If you are a supplier, click Address Book Self Services on the Bidder/Supplier SRM Portal or click Modify in the Event Bidder Contact field on the Search for Events form.	Update company, user profile, supplier master, and contact information, and add, edit, or update contact information.

Updating Address Book Information

Access the Update Address Book Record form.

If the user is a bidder, the Update Address Book Record form contains the General Info tab and the Contacts tab. If the user is a supplier, the Update Address Book Record form contains an additional tab called Supplier.

See *"Using the Address Book Self Service Program" in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide* .

See *"Using the Contacts Self Service Program" in the JD Edwards EnterpriseOne Applications Address Book Implementation Guide* .

7 Appendix A - Tables Used by the Operational Sourcing System

Tables Used by the Operational Sourcing System

This table lists the JD Edwards EnterpriseOne Operational Sourcing system tables:

Table	Description
Event Header (F43Q10)	Stores event header information, such as business unit, company, start times, event properties, payment information, and buyer contact information.
Event Detail (F43Q11)	Stores information for each line in an event, such as item number and description, quantity, and line weight.
Event Currencies (F43Q15)	Stores the currencies in which bidders can submit their bids for an event and the corresponding exchange rate.
Event Header Bid Questions (F43Q20)	Stores the header questions attached to each event, along with information such as best and worst values, ideal answers, and question weights.
Event Header Bid Question List (F43Q201)	Stores the list questions attached to an event and the list of values from which bidders can select responses.
Event Detail Bid Questions (F43Q21)	Stores the questions attached to each line in an event, along with information such as best and worst values, ideal answers, and question weights.
Event Detail Bid Question List (F43Q211)	Stores the list questions attached to each line in an event and the list of values from which bidders can select responses.
Event Detail Bid Question Price Component (F43Q212)	Stores the price component information for each line in an event.
Event Detail Price Break (F43Q213)	Stores the price break information for each line in an event.
Event Invited Bidders (F43Q30)	Stores the bidders and suppliers who were invited to each event and information such as address book number, email address, fax number, bid status (accepted, declined, submitted, and so on), and search type.
Response Header (F43Q40)	Stores the address book numbers of bidders and suppliers who have responded to an event and information such as their bid status and their header score.
Response Header Question (F43Q401)	Stores the responses to all header questions for each bidder and supplier who are participating in an event.

Table	Description
Response Header Question List (F43Q402)	Stores the responses to list questions of each bidder and supplier participating in an event.
Bidder Response Decline (F43Q403)	Stores the bidders and suppliers who have declined an event invitation and their reason for declining.
Response Disallow (F43Q404)	Reserved for future use
Response Disallow Line (F43Q405)	Reserved for future use
Response Line (F43Q41)	Stores the line information for each bid for an event, including the quantity, bid amount, question score, and the promised delivery date.
Response Detail Question (F43Q411)	Stores the responses to all line questions and the corresponding score for each bidder and supplier who are participating in an event.
Response Detail Question Price Break (F43Q412)	Stores bidder price break information for each event, including price break quantity and price.
Response Detail Question Price Components (F43Q413)	Stores price component information for each event, including component description and price.
Response Detail Question List (F43Q50)	Stores the responses to list questions of each bidder and supplier participating in an event.
Analyze Event Detail (F43Q51)	Stores analysis information by event line for each event, including bidder or supplier number, item number, bid amount, bid question score, award action, award quantity, and award percentage.
Bid Questions (F43Q60)	Stores all bid question templates and their associated information, such as effective date range, best and worst values, and weight.
Bid Question List Values (F43Q61)	Stores the values for list questions.
Bid Question Price Component (F43Q62)	Stores component information for price questions, including the component descriptions, question weights, and associated item or commodity values.
Sourcing Constants (F43Q90)	Stores the values specified in the JD Edwards EnterpriseOne Operational Sourcing system constants.
Bidder Registration (F43Q91)	Stores bidder registration information such as address book number, currency codes, minimum and maximum order values, and tad identification number.
F43Q911 – Bidder Country VAT (F43Q911)	Stores VAT (value added tax) information for bidders, such as country and VAT identification number.
Adhoc Item Definition (F43Q92)	Stores information for items that are added on an ad hoc basis during RFx creation, such as item number, stocking type, location, and so on.

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