Oracle Procurement Cloud: Source to Settle
(includes Purchasing, Sourcing, Contracts, Supplier Management)

What’s New in Release 11

March 2016
Revised: September 2016
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REVISION HISTORY

This document will continue to evolve as existing sections change and new information is added. All updates are logged below, with the most recent updates at the top.

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<thead>
<tr>
<th>Date</th>
<th>What's Changed</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>26 SEP 2016</td>
<td>Purchasing: <a href="#">Select the E-Mail Sender for Purchasing Document Communication</a></td>
<td>Added new feature.</td>
</tr>
<tr>
<td>01 JUL 2016</td>
<td>Sourcing: <a href="#">Modify Supplier Notifications</a></td>
<td>Updated details in the Steps to Enable section.</td>
</tr>
<tr>
<td>25 MAY 2016</td>
<td>Purchasing: <a href="#">Touchless Self Service Procurement Without Pre-Negotiated Agreements</a></td>
<td>Added new feature.</td>
</tr>
<tr>
<td>01 MAR 2016</td>
<td></td>
<td>Initial Document Creation.</td>
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OVERVIEW

This guide outlines the information you need to know about new or improved functionality in Oracle Procurement Cloud Release 11. Each section includes a brief description of the feature, the steps you need to take to enable or begin using the feature, any tips or considerations that you should keep in mind, and the resources available to help you.

GIVE US FEEDBACK

We welcome your comments and suggestions to improve the content. Please send us your feedback at oracle_fusion_applications_help_ww_grp@oracle.com.
Some of the new Release 11 features are automatically available to users after the upgrade, and some require action from the user, the company administrator, or Oracle.

The table below offers a quick view of the actions required to enable each of the Release 11 features.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Action Required to Enable Feature</th>
<th>Automatically Available</th>
<th>End User Action Required</th>
<th>Administrator Action Required</th>
<th>Oracle Service Request Required</th>
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</table>
Oracle Fusion Self Service Procurement streamlines the purchase requisitioning process using a consumer-centric approach and helps control employee spending by enforcing the procurement policy. Requisitions are validated and submitted for approval before they processed onto purchase orders in Oracle Fusion Purchasing.

MANAGE YOUR GRANTS

You can now enable Grants Management in the procurement processes. Self Service Procurement provides support for new grants-related attributes, allowing you to:

- Create requisitions with grants information from the Purchase Requisitions work area and via the open interface table, cloud file import, and web service.
- Route requisitions for approvals based on grants-related attributes.
- Generate account information based on grants-related attributes.
- Use encumbrance accounting with project burden distributions.

Grants-related Fields on the Billing Region

STEPS TO ENABLE

There are no steps necessary to enable this enhancement.

IMPORTANT: In the Project Financial Management offering, Project Costing must be implemented. The Grants Management offering must also be implemented.

TIPS AND CONSIDERATIONS

- Grants management is typically used in conjunction with budgetary control.
OVERLINE FIRST APPROVER

There is a new option to allow requesters to specify an overriding first approver used to start the requisition approval routing. Using approval rules, you can control how the approvals list should be generated based on whether an overriding first approver is provided on the requisition.

Overriding Approver on the Edit Requisition page

IMPORTANT: Approval rules need to be set up to use the overriding approver in order for the requisition to be routed to the specified user as the first approver.

STEPS TO ENABLE

To enable this feature, do the following:

1. Navigator > Setup and Maintenance.
2. Select the Procurement offering.
3. Click Setup.
5. Click the task link. Select your requisitioning business unit.
6. Select the “Enable approver override” option and save.

7. Set up approval rules to use the Overriding Approver to generate the approvals list if it is specified on the requisition.
TIPS AND CONSIDERATIONS

- You can set up approval rules to send an information notification to the original first approver on the requisition if an overriding approver is specified.

SIMPLIFIED APPROVAL E-MAILS

Approval e-mail notifications are enhanced for viewing in the mobile e-mail inbox. At a glance, you can see important approval request information: who is requesting, what they are requesting, and how much they are requesting. A drill down provides more details if needed. After reviewing, it is easy to approve right from the e-mail.
Requisition Approval E-mail

STEPS TO ENABLE

There are no steps necessary to enable this enhancement.

LEVERAGE THE PROCUREMENT CATEGORY HIERARCHY

Self Service Procurement delivers the ability to use categories from the Procurement Category Hierarchy in approvals, account generation rules, and business intelligence reporting.
Requisition approvals, account mapping sets and BI reports can now be based on the top 10 levels of categories in the procurement category hierarchy instead of only item level categories. This removes the overhead of keeping list of categories up to date in approval rules, account mapping sets and reports when there is any change to the procurement category hierarchy.
Approval Rules Using Procurement Category Hierarchy

Edit Approval Rules: Preapproval Header Hierarchy

Approval Task: Requisition Approvals
Version: 1531_21070603
Stage: Header Preapproval Stage
Participant: Preapproval Header Hierarchy

Rules

<table>
<thead>
<tr>
<th>Rule</th>
<th>Conditions</th>
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</thead>
<tbody>
<tr>
<td>Hardware approvals</td>
<td>Procurement Category Hierarchy Level 2 Equals Hardware</td>
</tr>
</tbody>
</table>

Hardware approvals: Details

Conditions

| Condition | Procurement Category Hierarchy Level 2 Equals Hardware |
There are no steps necessary to enable this enhancement.

INTEGRATE WITH PURCHASE REQUEST WEB SERVICE

The Purchase Request web service provides the capability for external applications to send requests to Fusion Procurement to create or control requisitions. The web service supports the following operations:

- **Populate**
  
  Commonly used for batch processing, where the web service is called to populate high volume requests into the requisition interface table.

- **Submit**
  
  After the populate operation is complete, the calling application must call the web service to perform the Submit operation, where the requisition import process will be kicked off to complete the creation of requisitions.
• **Create**

For lower volume requests, the Create operation will combine the Populate and Submit operations in one web service invocation.

• **Change**

The Change Purchase Request Operation supports cancellation of requisition lines. It also supports requests to change purchase order schedules that fulfill your requisitions, such as pushing out delivery dates, splitting delivery schedules and schedule cancellation requests.

• **Control**

This operation can be used to place or release hold on requisition lines. Requisition lines that are placed on hold are removed from the process requisition pool.

Requisitions that do not require management or tracking in Self Service Procurement can be created as externally managed requisitions via the Purchase Request Web Service or requisition import. These requisitions are not viewable in Self Service Procurement.

**STEPS TO ENABLE**

There are no steps necessary to enable this enhancement.
PURCHASING

Oracle Fusion Purchasing enables you to manage supplier agreements to ensure accurate pricing, terms and conditions, and policies with suppliers. It also enables you to manage purchase orders with suppliers to ensure timely delivery of goods and services.

MANAGE YOUR GRANTS

To support managing grants in the procurement processes, Purchasing includes new grants-related attributes within approvals, transaction account builder, encumbrance accounting and Purchase Orders Import. You can:

- Use new grant attributes to set up approval routing. Use these attributes in approval tasks and in the user interfaces that you use to set up approval.
- Use new Transaction Account Builder (TAB) sources that include grant attributes so that you can identify and build account segments on procurement transactions.
- Use grant attributes in encumbrance accounting.
- Use grant attributes in order import through an open interface table, cloud file import, or web service to create purchase orders.

The following screen capture illustrates the feature.

Grants Management Attributes on an Order

STEPS TO ENABLE

There are no steps necessary to enable this enhancement.

IMPORTANT: In the Project Financial Management offering, Project Costing must be implemented. The Grants Management offering must also be implemented.

TIPS AND CONSIDERATIONS

- Grants management is typically used in conjunction with budgetary control.
KEY RESOURCES

Please review the Release Training for this feature for more details.

INCLUDE CUSTOM CONTENT IN THE RESOURCE CATALOG

Improve reporting and productivity by extending custom reports and BI analytics to be available as content in the resource catalog. Administrators can add these custom analytics to the Purchasing Overview page.

The following screen capture illustrates this feature.

Purchasing Overview with Custom Content

STEPS TO ENABLE

There are no steps in Setup and Maintenance to enable this feature. However, follow the steps to add an analytic to your Purchasing Overview page.

1. The BI author must create and save the analytic to the directory: Shared Folders > Custom > Procurement > Purchasing.
2. Under Settings and Actions, click Manage Sandboxes to create a sandbox. On the Purchasing work area page, choose Customize Work Area Pages.
3. Click the Add Content button. On the popup, drill down to the desired report.
4. Click the Add link to add the report or analytic to the Overview page.

TIPS AND CONSIDERATIONS

• Please note that adding analytics to the Purchasing Overview page may affect the responsiveness of the page.

KEY RESOURCES

Review the Release Training for more details on how to use the feature.

USE SIMPLIFIED SETUP

The simplified setup feature includes the following key enhancements:

• Purchasing as an optional functional area
• Reduced required setup tasks
• Rapid implementation task list
• Simplified transaction account builder

PURCHASING AS AN OPTIONAL FUNCTIONAL AREA

Use the new Purchasing option in the Procurement offering to simplify Sourcing and Supplier Qualification-only implementations. This option allows you to filter the implementation tasks for an implementation that includes Oracle Fusion Sourcing or Oracle Fusion Supplier Qualification, but to not include the tasks that a full Purchasing implementation requires. Selecting the option will display all the Purchasing implementation tasks.

Configure Purchasing Option
REDUCED REQUIRED SETUP TASKS

Setup of the Procurement offering is simplified with a reduced number of required tasks. For example, commonly used seed data such as FOB and Freight Terms are available out of the box. In addition, defining common options for payables and procurement is now optional for creating procurement transactions.

RAPID IMPLEMENTATION TASK LIST

Use the new rapid implementation task list to quickly setup your system and get it up and running. The task list includes only the required and commonly used tasks.

Use spreadsheet upload utilities for creation of enterprise structure, like legal entities, ledgers, chart of accounts, business units and bank accounts.

The Configure Basic Enterprise Structure for Procurement task allows you to define the basic enterprise structure for procurement including creating and configuring a procurement business unit, configuring requisitioning business units, item and inventory organizations, units of measure and receiving parameters.

Rapid Implementation Task List

<table>
<thead>
<tr>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Procurement Configuration for Rapid Implementation</td>
</tr>
<tr>
<td>Define Geographies</td>
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<tr>
<td>Define Enterprise Structure Configuration for Procurement Rapid Implementation Including Purchasing</td>
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<td>Define Enterprise Structure Configuration for Procurement Rapid Implementation Excluding Purchasing</td>
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<tr>
<td>Define Common Procurement Configuration for Rapid Implementation</td>
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<td>Define Procurement Security Configuration for Rapid Implementation</td>
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<td>Define Self-Service Procurement Configuration for Rapid Implementation</td>
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<tr>
<td>Define Supplier Portal Configuration for Rapid Implementation</td>
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<tr>
<td>Define Sourcing Configuration for Rapid Implementation</td>
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</tbody>
</table>
Spreadsheet Upload Utilities for Enterprise Structure

New Task for Configuring Basic Enterprise Structure for Procurement

Centralized Procurement with a Common Procurement Center
SIMPLIFIED TRANSACTION ACCOUNT BUILDER

The transaction account builder (TAB) setup has been simplified with automatic association of the default transaction account definition for every new ledger created. In addition all mapping sets required for indirect procurement flows are now available under Purchasing mapping sets, eliminating the need to access Cost Management mapping sets. The procurement category hierarchy levels are now available as sources for mapping sets to define accounts at higher levels of the category hierarchy. In addition, many of the existing TAB sources, such as organization, item, category, and so on, now have a list of values for creating the mapping sets. Instead of using system generated identifiers, these mapping sets can now be created using user defined values for these sources.

STEPS TO ENABLE

There are no steps necessary to enable the feature.

TIPS AND CONSIDERATIONS

- If you want to use Sourcing or Supplier Qualification without Purchasing, then configure the Procurement offering and disable ‘Purchasing’ for implementation.
- If you plan to use the Procurement application only for indirect (expense) procurement, then consider using the rapid implementation task list to configure the basic enterprise structure for procurement.

KEY RESOURCES

Review the Release Training for more details on how to use the feature.

CREATE PDF FOR PURCHASE ORDERS

Purchasing data models have been published to the Oracle Business Intelligence Publisher (BIP). This allows you to easily obtain the data source directly from Oracle BIP so that you can expose attributes not shown by default or extend the data model to include additional attributes on the Purchase Order PDF.
The following screen capture illustrates this feature.

PDF Layout Template and the Data Model in BIP

Purchasing Data Model in BIP

STEPS TO ENABLE

There are no steps required to enable this feature. However there are steps involved in:

- Using the seeded data model as is and getting the xml data source to add additional attributes to your own custom PDF layout.
- Extending the data model to include attributes not available in the existing xml source.

These steps are detailed in the white paper listed in the Key Resources section.
KEY RESOURCES

- Please refer to the white paper: Document Publishing and Communication in Oracle Fusion Purchasing (Doc ID 1610339.1).
- Please review the Release Training for more details on how to use the feature.

USE PROCUREMENT CATEGORY HIERARCHY TO SIMPLIFY SETUP

Use a procurement category hierarchy to simplify setups for accounting and approvals by defining rules at the upper levels of the hierarchy, instead of for every category value. You can also improve BI reporting by using the procurement category hierarchy as a reporting dimension and enable drilldown into the hierarchy.

The following screen captures illustrate this feature.

![Manage Procurement Category Hierarchy](image)

Procurement Category Hierarchy
Transaction Account Builder using Category Hierarchy Level 2

Approval Rules Setup Example – Hardware
STEPS TO ENABLE

There are no steps required to enable this feature. After you create the procurement category hierarchy, it is automatically available for use in BI, TAB, and Approvals.

KEY RESOURCES

Review the Release Training for more details on how to use the feature.

INDICATE BUYER-MANAGED TRANSPORTATION

A buying company can now indicate their intent to manage transportation, including specifying shipping methods and arrangements to pick up goods from the supplier facility. Managing transportation allows the buying organizations to use their fleet more efficiently and leverage volume to negotiate better freight rates.

The requisition line and schedule line on the purchase order now include the requested ship date to improve planning integration and drop shipments for outsourced manufacturing. This configuration allows your organization to communicate the desired ship date to a supplier, and allows the supplier to promise or suggest a new ship date through a change order flow.

This functionality changes how you measure supplier performance for delivery. It allows the buyer to manage transportation for orders, and evaluate supplier performance against the ready-for-pickup ship date instead of the delivery date.

The negotiation line and the negotiation response line now include the requested ship date or promised ship date so that the buying company can negotiate ship dates with suppliers.
The following screen capture illustrates this feature.

**Buyer Managed Transportation Term on a Purchase Order**

**STEPS TO ENABLE**

Follow these steps in the Setup and Maintenance work area to enable this feature:

1. Navigator > Setup and Maintenance.
2. Select the Procurement offering.
3. In Administration region, from the Actions menu, select Change Configuration.
4. For the Procurement offering, click the Edit icon in the features column.
5. Select the checkbox for Buyer Managed Transportation.
Buyer Managed Transportation

6. Although this is not a required step to enable the feature, you will need to setup transit times on the Manage Transit Times task in the Setup and Maintenance work area in order to obtain anticipated delivery dates on your transactions.
**Manage Transit Times**

**KEY RESOURCES**

Please review the Release Training for more details on how to use the feature.

**USE SIMPLIFIED APPROVAL FOR E-MAILS**

Use simpler e-mail notifications in a mobile environment so that you can improve approver reply time. At-a-glance view of important approval request information is available such as total amount, requester, and the item ordered. A drill down provides more information if needed. After reviewing, it is easy to approve right from the e-mail.
The following screen capture illustrates this feature.

Example of Simplified Approval E-mail

**STEPS TO ENABLE**

There are no steps required to enable this feature.

**KEY RESOURCES**

Please review the Release Training for more details on how to use the feature.

**USE COLLABORATION MESSAGING FRAMEWORK**

You can use a standardized interface for cloud products so that you can integrate with inbound and outbound messaging and use these integration points as industry standard Open Applications Group Integration Specification (OAGIS) messages. The framework can publish and receive these messages to or from business-to-business service providers, or can use web services to connect directly with trading partners.

The messaging framework now supports OAGIS 7.2.1 and OAGIS 10.1.
The following screen captures illustrate this feature.

**Collaboration Messaging Framework**

**SIMPLIFIED MANAGEMENT OF B2B MESSAGING WITH PARTNERS**

The framework can publish and receive these OAGIS messages to or from a B2B Service Provider or use web services to directly connect with trading partners. The framework provides out-of-the-box support for Oracle Supplier Network.

**Collaboration Messaging Framework as the Preferred Communication Method**
SIMPLIFIED MESSAGING ADMINISTRATION CAPABILITY

The framework provides administrators with a dedicated work area to review and reprocess any failed messages as well as the processing history of all messages that failed processing. The failure reason can be viewed, and message reprocessing can be initiated.

Administrators also have the ability to review the complete history of all messages, not just the undelivered ones.

**Manage Undelivered Collaboration Messages**

**STEPS TO ENABLE**

Follow these steps in the Setup and Maintenance work area to enable this feature:

1. Navigator > Setup and Maintenance.
2. Select the Procurement offering.
3. Click Setup
5. Click the task link.
6. Under the Manage Collaboration Messaging Configuration task, enable the Procure to Pay business process.

7. Additionally, if you plan to use the Oracle Supplier Network as the service provider, use the Manage Collaboration Messaging Service Providers task to provide the Oracle Supplier Network URL, user name, and password for your buying organization on the Oracle Supplier Network.
Manage Collaboration Service Providers

After enabling the feature, you still need to perform setups in order to use the feature. Please refer to the Release Training for more details on the setup steps.

KEY RESOURCES

Please review the Release Training for more details on how to use the feature.

DROP SHIP FROM SUPPLIER TO CUSTOMER

You can effectively manage the physical and financial aspects of your supplier-to-customer drop shipments, helping you to reduce costs, improve order fulfillment cycle time, and improve working capital:

- **Plan and promise drop shipments.** Promise and source a customer order directly to your supplier.
- **Automate purchase orders.** Automatically create a purchase order that instructs your supplier to ship directly to your customer. Give your buyer and supplier visibility to important customer order information.
- **Automatically manage change orders.** Keep the buyer and supplier up to date. Automatically update the purchase order so that it reflects customer order changes. Automatically update the sales order so that it includes purchase order changes.
The following screen capture illustrates this feature.

**Purchase Order with Ship-to Customer and Address Details**

**STEPS TO ENABLE**

Follow these steps in the Setup and Maintenance work area to enable this feature:

1. Navigator > Setup and Maintenance.
2. Select the Procurement offering.
3. In Administration region, select Actions > Change Configuration.
4. For the Procurement offering, click the Edit icon in the features column.
5. Select the checkbox for Customer Sales Order Fulfillment to enable this feature.
Customer Sales Order Fulfillment Feature

KEY RESOURCES

Review the Release Training for more details on how to use the feature.

USE BACK-TO-BACK ORDERS IN YOUR SUPPLY CHAIN

Allow your company to buy directly to fulfill a customer order, helping you to reduce inventory while providing a wide variety of products to your customers:

- **Automatically create supply orders.** Automatically create a purchase order that is reserved to the sales order line. Provide visibility to the sales order and customer information on the reserved supply.
- **Automatically manage change orders.** Keep the buyer and supplier up to date. Automatically update the purchase order so that it reflects customer order changes. Automatically update the sales order so that it includes purchase order changes.
The following screen capture illustrates this feature.

![Screen capture of Back-to-Back Order Schedule]

**Back-to-Back Order Schedule**

**STEPS TO ENABLE**

Follow these steps in the Setup and Maintenance work area to enable this feature:

1. Navigator > Setup and Maintenance.
2. Select the Procurement offering.
3. In Administration region, select Actions > Change Configuration.
4. For the Procurement offering, click the Edit icon in the features column.
5. Select the checkbox for Customer Sales Order Fulfillment to enable this feature.
Customer Sales Order Fulfillment Feature

KEY RESOURCES

Please review the Release Training for more details on how to use the feature.

SUPPORT CONTRACT MANUFACTURING

You can now automate and orchestrate the full contract manufacturing process in a make-to-order environment. Run a touch less process for contract manufacturing that spans your raw material supplier, contract manufacturer, customer and the enterprise:

- **Automatically create and fulfill supply.** Automatically create purchase requisitions and orders that instruct the contract manufacturer to directly ship the goods to the customer or back to the warehouse. Provide contract manufacturing details such as product and work order on the purchase order.

- **Perform change management.** To keep the buyer and supplier up to date, automatically update the purchase order so that it reflects customer order changes, and update the customer regarding delays or changes that the contract manufacturer sends.
The following screen capture illustrates this feature.

**Contract Manufacturing Information on a Purchase Order**

**STEPS TO ENABLE**

There are no steps required to enable this feature within procurement. Refer to the *What’s New in Oracle SCM Cloud Release 11: Plan to Produce* document for more details.

**KEY RESOURCES**

Review the Release Training for more details on how to use the feature.
USE THE CONFIGURE-TO-ORDER PROCESS

You can use the new configure-to-order (CTO) process to efficiently fulfill configured orders. Use this streamlined, end-to-end process to simplify configured product fulfillment and to get complete visibility to every step. Use an intelligent design that reduces item proliferation and data replication, and that improves on-time order fulfillment:

- **Use multiple fulfillment options.** Get comprehensive support for configure-to-order fulfillment through procured drop-ship and procured back-to-back ship. Use the same process that a typical procured product uses to eliminate special procedures for configured products.
- **Price configured products.** Get pricing at the model level or at the option level using supplier agreements. In addition, multiple prices for an option can be captured to reflect model-specific pricing.
- **Get visibility.** Monitor the full configure-to-order process, from supply creation through procurement. Allow the user to visually monitor progress and manage the exceptions that might jeopardize timely order fulfillment.
- **Indicate configuration details on the order.** The details of the configuration, including the base model and optional components, are captured and communicated to the supplier as structured data on the purchase order.

The following screen captures illustrate this feature.
Purchase Agreements for Pricing Configurations

STEPS TO ENABLE

There are no steps required to enable this feature within procurement. Refer to the *What’s New in Oracle SCM Cloud Release 11: Plan to Produce* document for more details.

KEY RESOURCES

Review the Release Training for more details on how to use the feature.

TOUCHLESS SELF SERVICE PROCUREMENT WITHOUT PRE-NEGOTIATED AGREEMENTS

Simplify how you configure automated order creation from requisitions by eliminating the need for pre-negotiated agreements.

STEPS TO ENABLE

1. In the Navigator, click Setup and Maintenance.
2. Select the Procurement offering, and then click Setup.
3. Search for the following task: Configure Procurement Business Function.
4. For the corresponding procurement business unit, select the following option: Autogenerate orders from requestor-negotiated requisition lines.
Touchless Self Service Procurement Option

SELECT THE E-MAIL SENDER FOR PURCHASING DOCUMENT COMMUNICATION

Provide flexibility to set up the e-mail sender for purchasing document e-mails that are sent to suppliers. You can select between using the buyer's e-mail address or an automatically generated e-mail address.

STEPS TO ENABLE

1. In the Navigator, click Setup and Maintenance.
2. Search for and select the following task: Manage Administrator Profile Values.
3. Search for and select the following Profile Option: PO_FROM_EMAIL_ADDRESS.
4. Select the desired Profile Value: Buyer or Automatic.
SUPPLIER MODEL

The following new features are added or changed for Oracle Fusion Supplier Model in Release 11:

SUPPLIER APPROVAL HISTORY

To improve supplier management control and visibility a complete approval history is retained for Supplier Registration requests and Supplier Spend Authorization requests. This allows you to access critical approval information like who reviewed the supplier during on-boarding or to understand when a supplier was approved for spend. Approval history captures important actions, such as submission, request for information, and approve/reject actions. Also provided are details on every user that took an approval action, including comments that were entered by the user while taking action.

The following screen captures illustrate the feature and its benefits.

Approval History for a Rejected Spend Authorization Request

<table>
<thead>
<tr>
<th>Action</th>
<th>Name</th>
<th>Action Date</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit</td>
<td>Furey, Clare</td>
<td>6/19/15 2:04 AM</td>
<td></td>
</tr>
<tr>
<td>Reject</td>
<td>Dapolito, Cody</td>
<td>6/24/15 10:23 AM</td>
<td>Not ready to conduct business</td>
</tr>
</tbody>
</table>

Approval History for an Approved Supplier Registration Request

<table>
<thead>
<tr>
<th>Action</th>
<th>Name</th>
<th>Action Date</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit</td>
<td>Furey, Clare</td>
<td>6/23/15 3:01 PM</td>
<td>Please Approve</td>
</tr>
<tr>
<td>Request Information</td>
<td>Sletfer, Maricela</td>
<td>6/23/15 3:05 PM</td>
<td>Please provide Tax registration number</td>
</tr>
<tr>
<td>Submit Information</td>
<td>Furey, Clare</td>
<td>6/23/15 3:12 PM</td>
<td></td>
</tr>
<tr>
<td>Approve</td>
<td>Sletfer, Maricela</td>
<td>6/23/15 3:20 PM</td>
<td></td>
</tr>
</tbody>
</table>

STEPS TO ENABLE

There are no steps needed to enable this feature. The approval history region is part of the supplier registration request or spend authorization request for users to view.
IMPORT SUPPLIER SITE AND SITE ASSIGNMENT UPDATES

This feature expands on the comprehensive supplier import capabilities for creating and updating supplier records through Excel based import templates. Prior to Release 11, the mass update feature was limited to entities including Supplier Profile, Addresses, Contacts, and Business Classifications etc.

In this release, you can now perform mass updates on the following supplier profile entities:

- Supplier Sites
- Supplier Site Assignments

The corresponding import templates now support an action of Update that should be used to perform changes to the data.

With the coverage extended to sites and site assignments, the import solution encompasses a comprehensive set of supplier entities in terms of providing mass update support. Supplier sites often contain data that is negotiated as per organization procurement policies and needs to be maintained whenever changes occur to the policy terms and conditions. The support of mass update reduces the maintenance effort required to update supplier sites.

The following screen captures illustrate the feature and its benefits.

Site Import Template

You now also have access to seeded OTBI reports to extract supplier site data to perform mass updates. The report format resembles the import templates making it quick and convenient to copy the information to an import template to run the update process.
Seeded OTBI Reports for Supplier Site Mass Update

STEPS TO ENABLE

There are no steps necessary to enable this feature.

KEY RESOURCES

- Supplier Site and Supplier Site Assignment import templates are available from the Oracle Enterprise Repository (https://fusionappsoer.oracle.com/oer)

SUPPLIER IMPORT TEMPLATES FOR RAPID IMPLEMENTATION

To support rapid implementation objectives this release introduces a show/hide feature on all supplier import templates. The default view of the import template hides a majority of the columns that are used infrequently exposing only the key attributes required for effective data preparation for import. The hidden attributes can be exposed and used as necessary. Primary attributes are frozen on the template to retain context when navigating through the templates.

The enhanced supplier import templates improve usability and reduce work in preparing supplier master data for import.

The following screen captures illustrate this feature and its benefits.
STEPS TO ENABLE

There are no steps necessary to enable this feature.

KEY RESOURCES

- Supplier import templates are available from the Oracle Enterprise Repository (https://fusionappsoer.oracle.com/oer).

SUPPLIER REPORTING

Oracle Transactional Business Intelligence (OTBI) provides ad hoc tools for creating meaningful reports to better manage supplier data. This release introduces several new supplier reporting enhancements, which include the following:

- Supplier Metrics: Counts, approval cycle time and spend summary metrics can be used to create sophisticated reports providing critical visibility and insights to the supply base.

Metric based reports leverage native computational and aggregation functions provided by OTBI to enable proactive supplier profile monitoring and informed decision making.

The following screen capture illustrates the feature enhancement and its benefits.
• **Supplier Registration Reporting:** This enhancement extends the current supplier reporting solution by providing ad hoc reporting capabilities on supplier registration data. It allows for analysis and review of existing supplier registration patterns to improve the supplier on-boarding process.

A new subject area: Supplier Registration – Real Time is introduced which makes available all supplier registration attributes for ad hoc reporting needs.

The following screen captures illustrate the feature enhancement and its benefits.

**New supplier registration subject area**

<table>
<thead>
<tr>
<th>Inviting Procurement BU</th>
<th>Source</th>
<th>Count of Registration Requests</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision Operations</td>
<td>External</td>
<td>133</td>
</tr>
<tr>
<td></td>
<td>Internal Request</td>
<td>3</td>
</tr>
<tr>
<td></td>
<td>Self Service Procurement</td>
<td>12</td>
</tr>
<tr>
<td></td>
<td>Sourcing Invitation</td>
<td>133</td>
</tr>
</tbody>
</table>

**Custom OTBI Report Using Supplier Registration Attributes and Metrics**

• **Supplier Spend Authorization Approval History Reporting:** Provides insight into supplier approval details. Spend authorization approval is an important control process for ensuring a prospective supplier should be made available for procure to pay transactions. Visibility into approval cycle time, approver actions and dates across suppliers can help identify bottlenecks and improve spend authorization approval process.
The following screen capture illustrates the feature enhancement and its benefits.

**Spend Authorization Approval History BI Reporting**

- Reports for Supplier Import: Supplier import templates provide an efficient mechanism to create or update supplier data en masse. Import templates need to be populated correctly conforming to the right data structure and definitions for each attribute.

  This enhancement provides seeded OTBI reports which export supplier data in the format of the supplier import templates. Report results identify the correct supplier attribute data values and formats to be used for populating supplier import records.

  The seeded reports offer filters to retrieve specific supplier records requiring update. The results can then be downloaded in csv format, updated and copied into the corresponding supplier import template for mass update processing. Export reports eliminate data entry errors that occur when templates are populated manually.
The following screen captures illustrate the feature enhancement and its benefits.

Supplier Export Reports BI folder

Supplier Classification Import Template Seeded Report

STEPS TO ENABLE

There are no steps necessary to enable this feature.

KEY RESOURCES

- Supplier import templates are available from the Oracle Enterprise Repository (https://fusionappsoer.oracle.com/oer).

SUPPLIER IMPORT PURGE

Purging data from supplier import interface tables is important for preventing bad data from loading into the supplier master and for removing rejected import records. Easy to use purge options allow users to target specific supplier interface tables and import records for removal.
The following screen captures illustrate this feature and its benefits.

Purge Supplier Interface Records

Supplier Interface Table Purge Report

Purge Summary

<table>
<thead>
<tr>
<th>Records</th>
<th>Purged Record Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>22</td>
</tr>
</tbody>
</table>

Purge Supplier Interface Table Report

STEPS TO ENABLE

There are no steps necessary to enable this feature.
SOURCING

Oracle Fusion Sourcing delivers the structure, tools and information to maximize the value of supplier negotiations. With Sourcing, you can leverage negotiation best practices, drive strategic savings initiatives and achieve bottom-line results.

MANAGE SOURCING PROJECTS

Managing sourcing initiatives can include multiple stages and many stakeholders, so it is often necessary to use project management skills and tools to coordinate and run sourcing initiatives that include manage and schedule tasks. You can use Sourcing to seamlessly integrate with Oracle Fusion Project Management. You can manage strategic sourcing initiatives through a project plan, where you schedule sourcing tasks and associate them with the plan. The system can automatically update project tasks according to negotiation events, and you can easily assign project resources to the negotiation collaboration team.

The following screen captures illustrate the feature and its benefits.

Manage Sourcing Initiative as Projects
Automatic Update of Task Status

STEPS TO ENABLE

1. When creating a negotiation, select a negotiation style that has the “Project tasks” option enabled.

**IMPORTANT:** The Project Execution Management offering must be implemented to use this feature. The “Project tasks” option is enabled by default in the Standard Negotiation and Two Stage Negotiation styles delivered with Sourcing. Sourcing projects will be available on new negotiations created using one of these styles.

**KEY RESOURCES**

For more information on sourcing projects, please review the Release Training recording.

**PROPOSE ALTERNATE LINES**

If you choose to allow it, a supplier can propose an alternative product or service that is similar to the one being sourced, but where the alternative line provides a unique supply advantage. A category manager can analyze and compare supplier alternates and negotiation lines immediately adjacent to one another, and make an informed decision that awards an alternate line if it meets business needs and reduces cost.
The following screen captures illustrate this feature and its benefits.

**Create Alternate Line**

**Primary and Alternate Lines Side-by-Side**

**STEPS TO ENABLE**

1. When creating a negotiation, select a negotiation style that has the “Alternate response lines” option enabled.

**IMPORTANT:** The “Alternate response lines” option is enabled by default in the Standard Negotiation style delivered with the product. Alternate response lines will be available on new negotiations created using this style.
TIPS AND CONSIDERATIONS

- Category managers can decide whether to accept alternate response lines on the negotiation line by line basis, even if the negotiation style in use enables alternate response lines.

KEY RESOURCES

For more information on alternate lines, please review the Release Training recording.

PROVIDE ALTERNATE RESPONSES

A supplier can offer unique alternative proposals that leverage their strengths and potentially drive down costs for the buying organization. A supplier can submit multiple, alternative responses to a negotiation for evaluation. In an alternate response, the supplier contact can provide a completely separate set of responses for header level information, requirements, lines, and line details. A category manager can analyze and consider these responses for award. The supplier contact can mark responses as primary or alternate, and use this mark for internal reference or for further communication with the category manager regarding their bid preference.

The following screen captures illustrate this feature and its benefits.

![Response Rules](image)

Allow Multiple Responses
Supplier Response Type

STEPS TO ENABLE

1. Alternate responses can be enabled when creating a negotiation by selecting the response rule Allow multiple responses.

TIPS AND CONSIDERATIONS

Two new response rules allow category managers to fine tune the negotiation:

- **Allow multiple responses** enables suppliers to submit alternate responses. Alternate responses co-exist in a negotiation and can be awarded independently. The primary and alternate responses are active at the same time.
- **Allow response revision** enables suppliers to revise a previously submitted response.

KEY RESOURCES

For more information on alternate responses, please review the Release Training recording.

UTILIZE RICHER NEGOTIATION REQUIREMENT TYPES

New negotiation requirement types allow you to build a questionnaire that gathers richer and more relevant information. Use conditional requirements to build a questionnaire that automatically adjusts according to the reply to a previous requirement. Include multiple choice requirements and allow the supplier to provide more comments where needed. Share supporting information through negotiation requirement attachments, and control whether the supplier is required to submit attachments with their replies.
The following screen capture illustrates this feature and its benefits.

Create Negotiation Requirements: Multiple-choice with single selection option

**STEPS TO ENABLE**

There are no steps necessary to enable this feature.

**KEY RESOURCES**

For more information on richer negotiation requirement types, please review the Release Training recording.
LEVERAGE THE QUESTION LIBRARY FOR REQUIREMENTS

Category managers can leverage the question library that’s shared with Oracle Fusion Supplier Qualification, and can use these predefined questions as negotiation requirements. Questions are version-controlled and support similar attributes as requirements. You can also map questions to supplier profile attributes, such as minority-owned business classification, supplier type, or freight terms. If you map the questions to supplier profile attributes, the requirement responses from suppliers will be updated in the supplier profile after going through the proper approvals.

The following screen capture illustrates this feature and its benefits.

Add Predefined Questions to Negotiation

STEPS TO ENABLE

1. Navigator > Setup and Maintenance.
2. Select the Procurement offering.
3. Click Setup.
4. Search for the task named Manage Supplier Questions.
5. Click the task link.
6. Create questions and click Activate.
TIPS AND CONSIDERATIONS

- Oracle Fusion Supplier Qualification Management is not required to define questions in the question library.

KEY RESOURCES

For more information on the question library for requirements, please review the Release Training recording.

MANAGE REQUIREMENTS SPREADSHEET

Category managers can use a new, user-friendly spreadsheet to create the entire requirement structure offline. This spreadsheet supports the same actions that you can use online, such as adding sections, requirements, questions, acceptable values, and creating conditional requirements. Validations in the spreadsheet minimize errors during data entry. Color-coded fields identify required and optional attributes. A category manager can download existing requirements and, once the spreadsheet is ready to upload, decide whether or not to append or override the existing requirements.

The following screen capture illustrates this feature and its benefits.

Add Requirements Spreadsheet
STEPS TO ENABLE

No steps are necessary to enable this feature.

TIPS AND CONSIDERATIONS

- The new macros-enabled spreadsheet is supported from Microsoft Office Excel 2007 onwards.

KEY RESOURCES

For more information on the requirements spreadsheet, please review the Release Training recording.

COLLECT RESPONSES WITH REQUIREMENTS QUESTIONNAIRE

A supplier who replies to negotiation requirements now sees a questionnaire that displays requirements in a very intuitive way. A supplier can select one of the predefined choices for a multiple choice requirement below each requirement text, or can enter a reply in a designated text box. If a conditional requirement exists, then the system displays the relevant requirements dynamically after the supplier selects a predefined value. If you map requirements to questions, then the questionnaire uses replies from previous interactions with the supplier to enter default values on the new reply. The supplier can view and update the values, as necessary.

The following screen capture illustrates this feature and its benefits.
**STEPS TO ENABLE**

No steps are necessary to enable this feature.

**KEY RESOURCES**

For more information on the requirements questionnaire, please review the Release Training recording.

**GATHER SUPPLIER PROFILE INFORMATION IN REQUIREMENTS**

You can use responses gathered during the sourcing process to automatically update the supplier profile. Map various supplier profile attributes to questions that you can include later in negotiation requirements. A supplier replies to the negotiation, and then Sourcing displays the current profile values for each supplier. If the information is obsolete, Sourcing asks the supplier to provide updates. If the supplier updates the values, then the approval process that manages changes to the supplier profile will validate and approve the changes, and then update the profile.

The following screen capture illustrates this feature and its benefits.

![Supplier Response to a Requirement Linked to the Supplier Profile](image.png)

**STEPS TO ENABLE**

No steps are necessary to enable this feature.
KEY RESOURCES

For more information on updating the supplier profile from negotiation responses, please review the Release Training recording.

LEVERAGE THE RESPONSE REPOSITORY

Category managers can transfer the requirement responses to update the values in the response repository. Easily update and share supplier information across different procurement processes, such as supplier qualification. Category managers can view the reply history of the questions and view the previous responses when they evaluate the requirement.

The following screen capture illustrates this feature and its benefits.

![Response History View](image)

STEPS TO ENABLE

No steps are necessary to enable this feature.

KEY RESOURCES

For more information on the response repository, please review the Release Training recording.

SEARCH AND REPORT ACROSS REQUIREMENTS

Category managers can search negotiations by requirement name. They can search against requirements that map to questions and to the requirements defined in Sourcing. Category managers
can create custom reports in Oracle Transactional Business Intelligence on different requirement attributes to analyze the requirement data.

The following screen captures illustrate this feature and its benefits.

![Negotiation Search by Requirement](image)

**Negotiation Search by Requirement**
Sample OTBI Report with Requirement Responses

**STEPS TO ENABLE**

No steps are necessary to enable this feature.

**MODIFY SUPPLIER NOTIFICATIONS**

Tailor the content of supplier-facing notifications to match your organization’s preferred terminology and style. Use Oracle Page Composer to modify the negotiation invitation and award decision notifications within a familiar environment. Changes made to the notifications are preserved through upgrades.
The following screen capture illustrates this feature and its benefits.

---

**STEPS TO ENABLE**

1. Sign in to the Oracle BPM Worklist application as a Procurement Application Administrator.
2. Locate the supplier notification that you want to modify. Click Edit.
3. On the Edit page, click the View arrow, and then select Source.
4. Modify and save the notification.

**TIPS AND CONSIDERATIONS**

Only an administrator user who has been assigned the Procurement Application Administrator role can modify supplier-facing notifications.

After you complete your notification edits, the changes are visible to all users.

**KEY RESOURCES**

For more information on customizing pages, refer to the [Customizing Pages](#) chapter in the Extending the Applications for Functional Administrators guide.
Leverage the web service that handles negotiation awards to easily export award information from Sourcing and to create purchasing documents in existing procurement systems. Export award information for completed requests for quotes (RFQs) and auctions with any purchasing document outcome, such as orders or agreements.

The following diagram and screen captures illustrate this feature and its benefits.
Award Information Export into a Standard Compliant XML

**STEPS TO ENABLE**

1. Navigator > Setup and Maintenance.
2. Select the Procurement offering.
3. Click Setup.
4. Search for the task named Configure Procurement Business Function.
5. For the corresponding procurement BU, set the Purchasing Documents option to Export using web service.
7. Select the Procurement offering.
8. Click Setup.
9. Search for the task named Configure Negotiation Award Outbound Service.
10. In the URL field, specify the path to invoke the external service. Set the security policy and, based on the policy selected, enter the user name and password required to invoke the external service.

**KEY RESOURCES**

For more information on exporting award information, please review the Release Training recording.

**IMPORT PURCHASING DOCUMENT NUMBERS**

To monitor orders and agreements created in the existing purchasing system, import their numbers and references into Sourcing. Sourcing displays the purchasing numbers and allows the user to drill down to the existing purchasing system from the Purchasing Documents page.
The following screen captures illustrate this feature and its benefits.
**STEPS TO ENABLE**

1. Navigator > Setup and Maintenance.
2. Select the Procurement offering.
3. Click Setup.
4. Search for the task named Configure Procurement Business Function.
5. Click the task link.
6. For the corresponding procurement BU, set the Purchasing Documents option to Export using web service.
8. Select the Procurement offering.
9. Click Setup.
10. Search for the task named Configure Negotiation Award Outbound Service.
11. In the URL field, specify the path to invoke the external service. Set the security policy and, based on the policy selected, enter the user name and password required to invoke the external service.

**KEY RESOURCES**

For more information on exporting award information, please review the Release Training recording.

**BENEFIT FROM SIMPLIFIED SOURCING SETUP**

If Sourcing is deployed in coexistence with an existing purchasing system, then you can indicate that you do not intend to use Oracle Fusion Purchasing. If you do not select the Purchasing option during setup, then your implementation plan is optimized so that it does not include unnecessary tasks, resulting in a simpler configuration plan. The user interface that Sourcing displays will adapt to meet this new plan. It hides unnecessary fields and improves the user experience.
The following screen captures illustrate this feature and its benefits.

### Purchasing Option Not Enabled for Sourcing Standalone

<table>
<thead>
<tr>
<th>Offering</th>
<th>Description</th>
<th>Enable for Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Procurement</td>
<td></td>
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<tr>
<td>Purchasing</td>
<td></td>
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<tr>
<td>Self Service Procurement</td>
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<tr>
<td>Supplier Invoice Processing</td>
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<tr>
<td>Supplier Portal</td>
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<tr>
<td>Sourcing</td>
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<tr>
<td>Supplier Qualification</td>
<td></td>
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<tr>
<td>Procurement Contracts</td>
<td></td>
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</tr>
<tr>
<td>Procurement and Spend Business Intelligence Analytics</td>
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<tr>
<td>Sourcing Business Intelligence Analytics</td>
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</tbody>
</table>

### Rapid Implementation List for Sourcing Standalone

- Define Procurement Configuration for Rapid Implementation
  - Manage Geographies
  - Define Enterprise Structure Configuration for Procurement Rapid Implementation
  - Define Common Procurement Configuration for Rapid Implementation
    - Manage Locations
    - Configure Basic Enterprise Structure for Procurement
    - Define Basic Catalogs for Procurement Rapid Implementation
    - Manage Procurement Category Hierarchy
    - Manage Procurement Document Numbering
    - Define Supplier Configuration for Rapid Implementation
    - Define Procurement Security Configuration for Rapid Implementation
    - Define Sourcing Configuration for Rapid Implementation
STEPS TO ENABLE

No steps are necessary to enable this feature.

INDICATE BUYER-MANAGED TRANSPORTATION

A buying company can now manage transportation, including specifying shipping methods and arrangements to pick up goods from a supplier facility. Managing transportation allows the buying organization to use their fleet more efficiently and to leverage volume so that they improve their negotiating position for freight rates.

The following screen captures illustrate this feature and its benefits.

![Business Terms](image1)

**Buyer Managed Transportation in Negotiation Creation**

![Lines](image2)

**Requested Ship Date on the Negotiation Line**

STEPS TO ENABLE

Follow these steps in the Setup and Maintenance work area to enable this feature:

1. Navigator > Setup and Maintenance.
2. Select the Procurement offering.
3. In Administration region, select Actions > Change Configuration.
4. For the Procurement offering, click the Edit icon in the features column.
5. Select the checkbox for Buyer Managed Transportation to enable this feature.
Use a procurement category hierarchy to simplify setups for approvals by defining rules at the upper levels of the hierarchy, instead of for every category value. You can also improve BI reporting by using the procurement category hierarchy as a reporting dimension and enable drilldown into the hierarchy.

The following screen capture illustrates this feature.
Procurement Category Hierarchy

Negotiation approvals and BI reports can now be based on up to 10 levels of categories in the Procurement Category Hierarchy instead of only relying on the item level categories. This removes the overhead of keeping list of categories up to date in approval rules and reports when there is any change to the procurement category hierarchy.

**STEPS TO ENABLE**

1. Navigator > Setup and Maintenance.
2. Select the Procurement offering.
3. Click Setup.
4. Search for the task named Manage Procurement Category Hierarchy.
5. Define categories or hierarchy of categories for your organization.
6. Leverage the category hierarchy in your approvals rules and BI reports.

**KEY RESOURCES**

For more information on using the procurement category hierarchy, please review the Release Training recording.
Oracle Fusion Supplier Qualification Management enables you to streamline the process of qualifying suppliers according to pre-defined criteria that meaningfully support the procurement function within an organization. Using Supplier Qualification Management, you can define the requirements that a supplier should meet, pre-qualify the supplier based on a simpler set of requirements and then qualify the supplier by performing required verifications. It also allows you to assess and maintain the qualifications on an ongoing basis.

GATHER QUALIFICATION INFORMATION DURING SUPPLIER REGISTRATION

When a new supplier registers, you can ask qualification-related questions during the registration process using the information the supplier provides while registering. You can define rules via a rule-set to generate a questionnaire dynamically that asks relevant questions to the supplier. This feature includes the following capabilities:

- Define rule sets to generate the questionnaire: Specify the conditions that drive which qualification areas to include on the registration questionnaire. These conditions can be based on information gathered during the process such as the products and services the supplier provides.
- Control ordering of qualification areas: You can control the order in which the qualification areas appear on the registration questionnaire.
- Support question branching. Within the registration questionnaire, you may use conditional questions that branch off of earlier questions based on the supplier response.
- Support registration approval: You can download and view supplier response as a PDF file and consider the supplier responses as part of the registration approval process.
- Support migration of the rule sets: Your set-up can be easily migrated between environments.
The following screen captures illustrate the feature and its benefits.

Rule Set Editing
Qualification Questionnaire During Supplier Registration

STEPS TO ENABLE

1. Navigator > Setup and Maintenance.
2. Select the Procurement offering.
3. Click Setup.
4. Search for the task named Manage Supplier Registration Rule Sets.
5. Create a registration rule set for one or more Procurement business units.
6. Activate Rule Set.
7. Navigator > Setup and Maintenance
8. Select the Procurement offering.
9. Click Setup.
10. Search for the task named Configure Supplier Registration and Profile Change Request.
11. Confirm “Qualification Questionnaire” is enabled for Prospective and/or Spend Authorized Supplier Registration

TIPS AND CONSIDERATIONS

- Only one rule set per Procurement BU can be active at a time.
- Questionnaire will always include the latest revision of the qualification areas specified in the rule set.

IMPROVE COLLABORATION WITH ORACLE SOCIAL NETWORK

To foster better collaboration, the following supplier qualification objects are integrated with the Oracle Social Network:

- Qualification
- Assessment
- Initiative

STEPS TO ENABLE

Follow these steps in the Setup and Maintenance work area to enable this feature:

1. In the Navigator, select Setup and Maintenance.
2. Select the Procurement offering. Click Setup.
3. On the Setup: Procurement page, select the functional area named Application Extensions.
4. In the Applications Extensions section, select to show all tasks.
5. Select the task called Manage Oracle Social Network Objects and enable the desired objects for Supplier Qualification.

REPORT WITH ORACLE TRANSACTIONAL BUSINESS INTELLIGENCE (OTBI)

In order to facilitate reporting on qualification-related supplier information, you can leverage seeded subject areas in OTBI to create ad-hoc reports.

- New subject area for Qualifications and Assessments reporting: This subject area enables reporting on initiatives as well as the qualifications and assessments performed with the associated supplier responses. For example, you can report based on suppliers, suppliers’ business classification information, products and services information, qualification areas, Procurement Business Unit, and questions from the question library.
- New subject area for Supplier Question Response reporting: This subject area enables reporting on responses to questions in the question library that have been captured through qualification questionnaires, sourcing events, supplier registration questionnaires
and supplier profile updates. This subject area includes current and historical responses. You can report on this information using attributes based on suppliers, supplier sites, questions, and response details such as response status, submission time etc.

- Seeded Reports. You may use seeded sample reports as is or as starting points for meeting your own requirements.

**STEPS TO ENABLE**

There are no steps required to enable this feature.

**USE QUALIFICATION INFORMATION FOR RESEARCHING SUPPLIERS**

When creating an initiative, the user can now search and add suppliers and supplier sites based on search parameters that include information about past qualifications and assessments as well as search parameters that identify the suppliers that have not been qualified or assessed. This will allow you to find more easily the appropriate suppliers to target for your qualification initiative.

**STEPS TO ENABLE**

There are no steps required to enable this feature.

**CREATE THE QUESTIONNAIRE PDF**

You can download the questionnaires that are created during the initiative as a PDF file to use as reference or to share with responders for offline response.

**STEPS TO ENABLE**

There are no steps required to enable this feature.

**INTEGRATE WITH SUPPLIER MODEL**

In the Oracle Fusion Supplier Model, you can identify certain supplier profile entities as change-controlled, and these require approval when updated. When you tie supplier qualification questions to controlled attributes and you receive new responses for these questions, Supplier Qualification respects the profile change management approval process before you can use the response in evaluations.

To give companies more control over their supplier data, the responses for supplier mapped attributes are routed for review on a supplier profile change request. Supplier profile information changes can also be captured and reviewed from a Sourcing negotiation.

The change request organizes attributes by profile area and displays both the old and changed values to expedite review. Approvers can approve or reject the change request at their discretion.

Since the supplier record is locked during review the change request can always be canceled if edits are needed urgently. Questionnaire responses can be accepted again to regenerate the profile change request.
The following screen captures illustrate the feature and its benefits.

Supplier Profile Change Request

Cancel Change Request

STEPS TO ENABLE

There are no steps necessary to enable this feature.

INTEGRATE WITH SOURCING

With the integration of Sourcing and Supplier Qualification Management, questions from the question library can be used on Sourcing Negotiations. Also Supplier Responses submitted during Sourcing events are captured in the response repository and you can use that information in future qualifications. This integration ensures that both Sourcing and Supplier Qualification Management have the most current information available regardless of where the supplier provided the response.

STEPS TO ENABLE

There are no steps required to enable the feature.