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# Operational Sourcing

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# What is Operational Sourcing?

- An on-line bidding event to select an optimal supplier for a given item or commodity
- Selection is based upon scoring bidder responses to weighted questions concerning
  - Item/Commodity factors, such as
    - ✓ Price
    - ✓ Quality
    - ✓ Delivery
    - ✓ Available colors, sizes, etc.
  - Supplier factors, such as
    - ✓ Years in business
    - ✓ Locations
    - ✓ Reputation, etc.
- Awarding a single PO or Blanket Order to selected suppliers

# Operational Sourcing

- Net New application to license in 8.12 (G43Q)
  - Includes new self-service portal applications
- Focused on mid-market company need to conduct on-line bidding resulting in a specific purchase award
  - One-time PO or Blanket PO
  - For item master items
  - For Requisition Self Service defined commodities such as services or indirect purchases
- Not intended as B.O.B. solution for strategic vendor sourcing
  - Not focused on reducing supplier base through bidding on a group of direct materials or industrial commodities
  - Not for live, reverse-auction events with multiple rounds of bidding
  - Does not generate a “contract” document

# Today's Flow

- Complete an open event from a bidder's point of view
- Award PO/OB to selected bidder(s)
- Create a new event
- Discuss setting up question templates
- Be aware of the Sourcing Application constants

# Bidder Response

1. Click on the Self-service link in the e-mail go to the self-service screen and log in
2. Review the item to quote on and view the attachments
3. Accept the request
4. Respond to header and item questions
5. Submit the bid and log out

# Bidders Respond to email link to reach the Bidder's Work Bench

The screenshot displays the Oracle Bidder Workbench interface. The main window is titled "Bidder Workbench - Search for Events". On the left, there is an "EnterpriseOne Menu" with sections for "Open Applications", "Fast Path", and "Back to Navigation by Role". The "Open Applications" section includes links for "Bidder Workbench - Search for Events" and "Event Workbench - Search for Events". The "Fast Path" section shows "P43Q40". The "Back to Navigation by Role" section includes "Operational Sourcing", "Daily Processing", "Event Workbench", "RFx Print", and "Setup".

The main content area shows a search form with the following fields:

- Bidder Number: 4343 (Parts Emporium)
- Search By:
  - Event Number: 34260
  - Event Status: -- Select One --
  - Event Format: -- Select One --
  - Bidder Status: -- Select One --
- Sort By: -- Select One --
- Ascending:  Ascending,  Descending

A "Find" button is located below the search form. A callout bubble with the text "Find events" points to the "Find" button.

Below the search form, there is a table titled "Event" with the following data:

Event Number	Event Name	Event Format	Event Status	Bidder Status	Bid Histor
34260	Demo of RFx	RFx	Posted	Registered	<a href="#">None</a>

Below the table, there are buttons for "Register", "Decline", "Accept", "Respond", and "Preview".

Below the buttons, there is a table titled "Event Item" with the following data:

Item Description	Minimum Quantity	Request Date	Deliver To
Mountain Bike, Red	.0000	01/27/06	Eastern Distribution Center

At the bottom of the main window, there is a "Close" button.

# Bidder must “Accept” the Event

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EnterpriseOne Menu

Open Applications:

- Bidder Workbench - Accept Event Invitation
- Event Workbench - Search for Events

New Window

Fast Path:

P43Q40

Back to Navigation by Role

- Operational Sourcing
  - Daily Processing
    - Event Workbench
    - RFX Print
  - Setup
    - Sourcing Constants
    - Bid Questions Setup
    - Print Message
    - Revisions

Bidder Workbench - Accept Event Invitation

Event Number: 34260

Event Name: Demo of RFX

Terms and Conditions

Please accept all my terms and condition without reading.  
Thank you

I agree to the above terms and conditions.

Save and Close Cancel

Sign Out

**Accept T&C  
in order to  
bid**

# Bidder can now Respond

Preview Window;  
then Respond

The screenshot displays the Oracle EnterpriseOne Bidder Workbench interface. At the top, the Oracle logo is visible. On the left, there is a navigation menu with sections for 'Open Applications', 'Fast Path', and 'Operational Sourcing'. The main area shows search filters for Bidder Number (4343), Event Number (34260), and Bidder Status. Below the filters is a 'Find' button. The 'Event' section shows a table with one record: 'Started' with Bidder Status 'Invite Accepted'. Below the table are buttons for 'Register', 'Decline', 'Accept', 'Respond', and 'Preview'. The 'Preview' button is highlighted with a yellow background and an arrow from the callout box. Below the event table is an 'Event Item' table with one record: 'Mountain Bike, Red' with a quantity of .0000 and a request date of 01/27/06. At the bottom, there is a 'Close' button.

# Bidder Sees Event Overview

**ORACLE** Sign Out

**EnterpriseOne Menu**

**Open Applications:**

- Bidder Event Introduction - Overview and Questions
- Event Workbench - Search for Events

New Window

**Fast Path:** P43Q40

**Back to Navigation by Role**

- Operational Sourcing
- Daily Processing
- Event Workbench
- RFx Print
- Setup

**Bidder Event Introduction - Overview and Questions**

Event Number: 34260  
Event Format: RFx  
Event Start Time: 01/27/06 13:06:20  
Event End Time: 02/02/06 13:06:20

Enter bid currency: Event Currency: USD

Answer the following bid questions about your: Company and Product or Services

**Review Event Information**

Event Name: Demo of RFx  
Event Description: Demo of RFx

**Buyer Contact Information:**

Buyer: Parts Emporium  
Phone Number: 722-5154 Part@emp.com  
Payment Terms: Net 30 Days

**Review Event Totals**

Number of Bid Lines	1	Company Score	.0
Bid Number	1	Products/Services Score	
Total Bid Amount		Total Event Score	

Submit Bid

Save Changes Save and Close Cancel

**Dates, Currency, Contacts, etc.**

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# Bidder Responds to Header Questions

**ORACLE**

EnterpriseOne Menu

Open Applications:

- Bidder Response - Answer Company Questions
- Event Workbench - Search for Events

New Window

Fast Path:

P43Q40

Back to Navigation by Role

- Operational Sourcing
  - Daily Processing
    - Event Workbench
    - RFx Print
    - Setup

Bidder Response - Answer Company Questions

Add Header Attachments

Event Number: 34260

Event Format: RFx

Event Start Time: 01/27/06

Event End Time: 02/02/06

Sign Out

Company Questions

No.	Question Description	Requires Response	Response
1	List your branches	Yes	No

Your Response:

Question #: 1      Responded to: No

Question: List your branches

Required: Yes

Ideal: Denver

Response: [Select from a List of Values](#)

Denver

Additional Response Comments: [Email Buyer](#)

Next Question    Delete Response    Add Attachments

and Continue    Cancel

See "Ideal" response; Add More Info

# Responding to a Multiple Values List

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EnterpriseOne Menu

Open Applications:

- Bidder Response - Select from a List of Values
- Event Workbench - Search for Events

New Window

Fast Path:

P43Q40

Back to Navigation by Role

- Operational Sourcing
- Daily Processing
  - Event Workbench
  - REx Print
- Setup

Bidder Response - Select from a List of Values

Sign Out

Ideal: Denver

Select one or more

Records 1 - 6 Customize Grid

Select	List Item
<input type="checkbox"/>	New York
<input type="checkbox"/>	Seattle
<input checked="" type="checkbox"/>	Denver
<input type="checkbox"/>	Baltimore
<input type="checkbox"/>	Los Angeles
<input type="checkbox"/>	San Francisco

Check one or more

Save Changes Save and Continue Cancel

# Responding to Line Item Questions

**ORACLE**

EnterpriseOne Menu

Open Applications:

- Bidder Response - Answer Product or Service Questions
- Event Workbench - Search for Events

New Window

Fast Path: P43Q40

Back to Navigation by Role

- Operational Sourcing
- Daily Processing
- Event Workbench
- RFx Print
- Setup

Products and Services: Event End Time 02/02/06

Records 1 - 1

Line No.	Item or Service Description	Bid Quantity	UOM	Promise Deliver Date	Bid Amount	Event Quantity	Min Bid Quantit
1	Mountain Bike, Red	1000.0000	EA	04/01/06	7,000.00	1000.0000	

Total Bid Amount 7,000.00

Questions Regarding: Mountain Bike, Red

Records 1 - 1

Line No.	Question Description	Requires Response	Respo
1	Price Template	YES	NO

Your Response:

Responded To This Question  YES Question # 1

Question: What is the price of the itme

Required  YES Weighting 100.0000

Response: Enter Bidder Price Breaks  
7.0000

Additional Response Comments: Email Buyer

Next Question Delete Response Add Attachments

**Add Attachments if desired**

# Bidders Submits their Response

**ORACLE** Sign Out

**EnterpriseOne Menu**

**Open Applications:**

- Bidder Event Introduction - Overview and Questions
- Event Workbench - Search for Events

New Window

**Fast Path:** P43Q40

**Back to Navigation by Role**

- Operational Sourcing
- Daily Processing
  - Event Workbench
  - RFX Print
- Setup

**Bidder Event Introduction - Overview and Questions**

Event Number: 34260  
Event Format: RFX  
Event Start Time: 01/27/06 13:06:20  
Event End Time: 02/02/06 13:06:20

Enter bid currency: Event Currency: USD

Answer the following bid questions about your: Company and Product or Services

**Review Event Information**

Event Name: Demo of RFX  
Event Description: Demo of RFX

**Buyer Contact Information:**

Buyer: Parts Emporium  
Phone Number: 722-5154 Part@emp.com  
Payment Terms: Net 30 Days

**Review Event Totals**

Number of Bid Lines	1	Company Score	.0000
Bid Number	1	Products/Services Score	90.0000
Total Bid Amount	7,000.00	Total Event Score	90.0000

Submit Bid

Save Changes Save and Close Cancel

**Keep Saving until you Submit**

# Bidder can only submit One Response

**ORACLE** Sign Out

**EnterpriseOne Menu**

**Open Applications:**

- Bidder Event Introduction - Overview and Questions

New Window

**Fast Path:**

P43Q40

**Roles:**

OWAPDEV

- Submit Job

- View Job Status

▶ Favorites

▶ End-User Tasks

▶ End-User Tasks

▶ Internal Use Only 2

▶ Mobile Sales Menus

▶ EnterpriseOne Menus

▶ Content Development Tools

▶ Power User Tasks

▶ Internal Use Only

▶ End-User Tasks

▶ End-User Tasks

▶ End-User Tasks

- My System Options

- My System Profile

- Work With Item Manager

- Help

**Bidder Event Introduction - Overview and Questions**

Event Number: 34260

Event Format: RFx

Event Start Time: 01/27/06 13:06:20

Event End Time: 02/01/06 01:06:20

Enter bid currency: Event Currency: USD

Answer the following bid questions about your: Company and Product or Services

**Review Event Information**

Event Name: Demo of RFx

Event Description: Demo of RFx

**Buyer Contact Information:**

Buyer: Parts Emporium

Payment Terms: Net 30 Days

Phone Number: 722-5154

Part@emp.com

**Review Event Totals**

Number of Bid Lines	1	Company Score	3.0000
Bid Number	1	Products/Services Score	90.0000
Total Bid Amount	7,000.00	Total Event Score	93.0000

Close

See how well you've done

# Sourcing Event Response

- Tables

- F43Q40 – Response Header
- F43Q401 – Response Header Question
- F43Q402 – Response Header Question list
- F43Q403 – Bidder Response Decline
- F43Q404 – Response Disallow
- F43Q405 – Response Disallow Line
- F43Q41 – Response Line
- F43Q411 – Response Detail Question
- F43Q412 – Response Detail Question Price Break
- F43Q413 – Response Detail Question Price Component
- F43Q414 – Response Detail Question List
- F43Q91 – Bidder Registration
- F43Q911 – Bidder Country VAT

# Buyer Analyzes the Event

1. Locate the active event and review the rankings calculated by the system
2. Award the business to the highest-ranking bidder.
3. Discuss the sourcing event workbench
  - a. Ability to do RFI, RFX
  - b. Ability to use existing vendors, bidders, new bidders
  - c. Event dates

# Buyer Reviews their Work Bench

The screenshot shows the Oracle EnterpriseOne Event Workbench search interface. The left sidebar contains the 'EnterpriseOne Menu' with sections for 'Open Applications', 'Fast Path', and 'Back to Navigation by Role'. The main area is titled 'Event Workbench - Event Workbench - Search for Events' and features a 'Processing...' status indicator. Search parameters include 'Event Number' (34260), 'Event Format' (dropdown), 'Event Status' (dropdown), 'Event Start Time', 'Preview Start Time', 'Event End Time', 'Item Number', and 'Commodity Code'. A 'Business Unit' dropdown is also present. A callout bubble points to the search parameters with the text 'Many Search parameters'. Below the search area are buttons for 'Find', 'Add RFx', and 'Add RFI'. The 'Events' section displays a table with one record: Event Number 34260, Event Name 'Demo of RFx', Business Unit 30, and Event Status 'Posted - In Progress'. Below the table are buttons for 'Analyze', 'Bid History', 'Cancel Event', 'End Event', and 'Extend Event'. The 'Event Lines' section is partially visible at the bottom.

**Many Search parameters**

# Buyer Sees Summary Scoring

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EnterpriseOne Menu

Open Applications:   
 - Analyze Event   
 New Window

Fast Path:   
 P43Q40

Back to Navigation by Role

Operational Sourcing   
 Daily Processing   
 - Event Workbench   
 - RFX Print   
 Setup

Cancel

Event Number: 34260 Demo of RFX Business Unit: 30   
 Event Format: BY RFX End Date and Time: 02/02/06 13:06:20   
 Event Status: P Posted Sealed Event   
 Currency Code: USD U.S. Dollar

RFX Summary RFX Header RFX Line Award Summary Bidder Award

Sort By Method: Bidder Name   
 Ascending   
 Descending   
 Sort

Select	Bidder Name	Bid Amount	Total Score	Header Score	Award Action	Reason Code
<input checked="" type="checkbox"/>	Parts Emporium	7,000.00	93.0000	3.0000	N	

Records 1 - 1

Select First 3 Bidders Select First 3 Bidders Display

Line Number	Description	Weight	Parts Emporium
	Header	10.0000	7000.00
1	Mountain Bike, Red	90.0000	7000.00

Records 1 - 2

All Bidders would be listed

Compare scores by bidder

# Buyer digs into Header Responses

**ORACLE**

EnterpriseOne Menu

Open Applications:   
 - Analyze Event   
 New Window

Fast Path:   
 P43Q40

Back to Navigation by Role

Operational Sourcing   
 Daily Processing   
 - Event Workbench   
 - Rfx Print   
 Setup

Event Workbench - Analyze Event

Cancel

Event Number: 34260 Demo of RFX Business Unit: 30   
 Event Format: BY RFX End Date and Time: 02/02/06 13:06:20   
 Event Status: P Posted Sealed Event   
 Currency Code: USD U.S. Dollar

Rfx Summary Rfx Header Rfx Line Award Summary Bidder Award

Sort By Method: Bidder Name   
 Ascending   
 Descending

Sort

Select	Bidder Name	Bid Amount	Total Score	Header Score	Award Action	Reason Code
<input checked="" type="checkbox"/>	Parts Emporium	7,000.00	93.0000	3.0000	N	

Bidders Select First 3 Bidders Display

	Bid Question Code	Bid Question	Weight	Ideal	Parts Emporium
<input checked="" type="checkbox"/>	TL1	List your branches	100.0000	Denver	Denver

See all Questions, and all bidder responses

# Buyer digs into Line Item Responses

**ORACLE**

EnterpriseOne Menu  
 Open Applications: Analyze Event  
 New Window  
 Fast Path: P43Q40  
 Back to Navigation by Role  
 Operational Sourcing  
 Daily Processing  
 Event Workbench  
 RFX Print  
 Setup

Currency Code: USD U.S. Dollar  
 RFX Summary | RFX Header | RFX Line | Award Summary

Sort By Method: Bidder Name  
 Ascending (selected)  
 Descending  
 Sort

Records 1 - 1

Select	Bidder Name	Bid Amount	Total Score	Header Score	Quantity	UM	Line Score
<input checked="" type="checkbox"/>	Parts Emporium	7,000.00	93.0000		1000.0000	EA	10

Clear Selected Bidders | Select First 3 Bidders | Display

**RFX Line**

Event Line Number: 1  
 Select  
 View Responses (selected) | Description: Mountain Bike, Red  
 View Scores | Requested: 01/27/06  
 Line Weighting: 90.0000  
 Event Start Price: 20.0000  
 Quantity: 1000.0000 EA  
 Analyze Quantity: 1000.0000

Records 1 - 1 Customize Grid

Bid Question Code	Bid Question	Weight	Ideal	Parts Emporium
TP1	What is the price of the itme	100.0000	10.0000	7.0000

Scroll through items; see the questions and answers

# Buyer Awards Exceptions by Line Item

**ORACLE**

EnterpriseOne Menu

Open Applications:

- Analyze Event
- New Window

Fast Path: P43Q40

Back to Navigation by Role

- Operational Sourcing
  - Daily Processing
    - Event Workbench
    - RFx Print
  - Setup

RFx Summary | RFx Header | RFx Line | Award Summary | Bidder Award

Line Information

Records 1 - 1 Customize Grid

Description	Event Quantity	Unit Price	Extended Price	Awarded Quantity	Awarded Price	Quantity Remaining	Line Status	Request Date
Mountain Bike, Red	1000.0000	20.0000	20,000.00	1000.0000	7000.00		Open	01/27/06

Display Awarded Bidders

Awarded Bidders

Line Number: 1 | Description: Mountain Bike, Red |  Quantity Required

Awarded Quantity: 1000.0000 | Awarded Price: 7000.00

Records 1 - 1 Customize Grid

Bidder Name	Awarded Quantity	Line Bid Amount	Extended Price
Parts Emporium	1000.0000	7.0000	7000.00

Post an Award for a single line

# Buyer Awards at the Header Level

**Post an Award for entire event**

**EnterpriseOne Menu**

**Open Applications:**  
 - Analyze Event  
 New Window

**Fast Path:**  
 P43Q40

**Back to Navigation by Role**

Operational Sourcing  
 Daily Processing  
 Event Workbench  
 RFX Print  
 Setup

**Complete** **Setup** **Cancel**

Event Number: 34260 Demo of RFX  
 Event Format: BY RFX  
 Event Status: T Pending Award  
 Currency Code: USD U.S. Dollar

RFx Summary RFx Header RFx Line Award Summary Award

Sort By Method: Bidder Name  
 Ascending  
 Descending

Sort

Records 1 - 1								
	Bid Quantity	UM	Line Score	Award Action	Reason Code	Percent Award	Award Quantity	Purch Line I
000	1000.0000	EA	100.0000	A		100.0000	1000.0000	

Clear Selected Bidders Select First 3 Bidders Display

**RFx Line**

Event Line Number: 1  
 Line Weighting: 90.0000  
 Event Start Price: 20.0000  
 Quantity: 1000.0000 EA  
 Analyze Quantity: 1000.0000

Description: Mountain Bike, Red  
 Requested: 01/27/06

View Responses (selected)  
 View Scores

Records 1 - 1				
Bid Question Code	Bid Question	Weight	Ideal	Parts Emporium

# Buyer Reviews all the Awards

ORACLE

EnterpriseOne Menu

Open Applications:

- Analyze Event
- New Window

Fast Path: P43Q40

Back to Navigation by Role

- Operational Sourcing
- Daily Processing
  - Event Workbench
  - RFX Print
- Setup

Complete Save Cancel

Event Number: 34260 Demo of RFX Business Unit: 30

Event Format: BY RFX End Date and Time: 02/01/06 01:06:20

Event Status: T Pending Award  Sealed Event

Currency Code: USD U.S. Dollar

[RFX Summary](#) [RFX Header](#) [RFX Line](#) [Award Summary](#) Bidder Award

**Bidder Award - Bidder Selection**

Records 1 - 1 [Customize Grid](#)

	Bidder Name	Award Number	Award Document
	Parts Emporium		1 0- -

Select Bidder

Split awards and lines over multiple bidders

# Buyer Posts the Award to Create PO/OB

**ORACLE**

EnterpriseOne Menu

Open Applications: [Analyze Event](#)

New Window

Fast Path: P43Q40

Back to Navigation by Role

- Operational Sourcing
  - Daily Processing
    - Event Workbench
    - Rfx Print
    - Setup

Sign Out

Select Bidder

**Bidder Award - Post Award**

Bidder Name: [Parts Emporium](#) Buyer: 4343

Award Document: [ ]

Award Number: 1  Display Total Bid Price

Award Price: 7000.00  Display Bid Questions

Freight Handling Code: C *Freight Collect*  Display Award Details

PO Business Unit: 30 *Eastern Distribution Center*  Display Bid Scores

Award Currency:  U.S. Dollar  Display All Bids

Records 1 - 1 [Customize Grid](#)

Event Line Number	Description	Award Quantity	Unit Price	Extended Price	Foreign Unit Price	Ft P
1	<a href="#">Mountain Bike, Red</a>	1000.0000	7.0000	7000.00	.0000	

Post Award

Can award more in a later posting

# OP/OB displayed; Complete the Event

The screenshot shows the Oracle EnterpriseOne interface for the 'Bidder Award - Post Award' form. A callout bubble points to the 'Parts Emporium' bidder name field, containing the text 'Immediate PO/OB Generation'.

**EnterpriseOne Menu**

- Open Applications: Analyze Event, New Window
- Fast Path: P43Q40
- Back to Navigation by Role
- Operational Sourcing
  - Daily Processing
  - Event Workbench
  - RFx Print
  - Setup

**Select Bidder**

**Bidder Award - Post Award**

Bidder Name: Parts Emporium Buyer: 4343

Award Document: 214083-OP-00001

Award Number: 1

Award Price: 7000.00

Freight Handling Code: C *Freight Collect*

PO Business Unit: 30 *Eastern Distribution Center*

Award Currency: Event Currency U.S. Dollar

Display Total Bid Price  
 Display Bid Questions  
 Display Award Details  
 Display Bid Scores  
 Display All Bids

**Records 1 - 1**

Event Line Number	Description	Award Quantity	Unit Price	Extended Price	Foreign Unit Price	Ft Pi
1	<u>Mountain Bike_Red</u>	1000.0000	7.0000	7000.00	.0000	

**Complete Save Cancel**

# Sourcing Event Analyze

- Tables
  - F43Q50 – Analyze Event Header
  - F43Q51 – Analyze Event Line

# Set up a New Event

- Add a new event
  - Review sourcing event dates
- Select items to bid on
  - Add an item or commodity
  - Discuss copying a “Buyers BOM”
    - ✓ Sourcing BOM type for several similar items  
E.g., plastic moldings, steel tubes, castings
- Use Question Template
  - Associates multiple questions to the items
- Attach text and images to an event line.
- Invite bidders
  - One existing vendor and One existing bidder
  - Add one new bidder on the fly.

# Agenda for a New Event

- Buyer Workbench
- RFx Header
- Event Contact information
- Header Scoring
- Header Question
- Event Invite Bidders
- Event Line
- Event Line Question

# Begin by Adding Event on Work Bench

The screenshot displays the Oracle EnterpriseOne Event Workbench interface. The top navigation bar includes the Oracle logo and a 'Sign Out' link. The left sidebar contains the 'EnterpriseOne Menu' with sections for 'Open Applications', 'Fast Path', and 'Back to Navigation by Role'. The main content area is titled 'Event Workbench - Event Workbench - Search for Events' and features a search form with fields for Event Number, Event Format, Event Status, Event Start Time, Preview Start Time, Event End Time, Item Number, and Commodity Code. A 'Processing...' status indicator is visible in the top right of the search area. Below the search form are 'Add RFx' and 'Add RFI' buttons. The 'Events' section shows a table with columns for Event Number, Event Name, Business, and Event Status, but it displays 'No records found.' Below the table are buttons for 'Analyze', 'Bid History', and 'Cancel Event'. A callout box points to the 'Add RFI' button with the text: 'RFI for info-only; RFx for info and prices'. The bottom of the page features a red banner with the Oracle logo.

# Put Event Dates in the Header

**ORACLE** Sign Out

**EnterpriseOne Menu**

**Open Applications:**  
- Add/Edit Event  
New Window

**Fast Path:**  
G43Q

**Back to Navigation by Role**

- Operational Sourcing
  - Daily Processing
    - Event Workbench
    - RFx Print
  - Setup
    - Sourcing Constants
    - Bid Questions Setup
    - Print Message Revisions

**Event Workbench - Add/Edit Event**

Save Changes Save and Close Submit Cancel

**Event Definition**

Business Unit 30 Event Number 0  
Event Format RFx Event Status Open  
Event Name Demo of RFx  
Event Description Demo of RFx

**Event Dates/Times**

Preview Start Date/Time 01/27/06 11:06:20  
Event Start Date/Time 01/27/06 13:06:20  
Event End Date/Time 01/28/06 13:06:20

Invite Bidders Header Bid Questions

**Properties** Scoring Payment Contact Info Event Attachments

Bid Required  Line Quantity Required Award   
 Display Bid Question Weights  Sealed Event Terms and Conditions   
 Display Bid History Page  Allow Manual Extensions

Copy From RF1 Copy From RFx Copy From BOM

**Event Lines**

Records 1 - 1

	New Item	Add New Item	Item Number	Item Description
	<input type="checkbox"/>	NEW		

Controls bidder preview, start, and end dates

# Review Basic Event Information

**Defaults from Sourcing Constants**

**Event Definition**

Business Unit: 30      Event Number: 0  
 Event Format: RFx      Event Status: Open  
 Event Name: Demo of RFx  
 Event Description: Demo of RFx

**Contact Info**

Buyer: 4343  
 Contact Name: Parts Emporium  
 E-Mail: Part@emp.com  
 Phone Number: 303 722-5154

**Event Lines**

	New Item	Add New Item	Item Number	Item Description	Additional Line Info	Line Type	Commodity Code	Quantity
Records 1 - 1	<input type="checkbox"/>	NEW			Edit			

# Weight the Header vs. Line Questions

The screenshot displays the Oracle Event Workbench interface for adding or editing an event. The main form is titled "Event Workbench - Add/Edit Event" and includes several sections:

- Event Definition:** Fields for Business Unit (30), Event Number (0), Event Format (RFx), Event Status (Open), Event Name (Demo of RFx), and Event Description (Demo of RFx).
- Event Dates:** Fields for Event Start Date and Event End Date (01/28/06 13:06:20).
- Scoring Section:** Two radio button options: "Assign Header Weighting" (selected) and "Factor Header Score Into Line". The "Assign Header Weighting" option has a "Header Weighting" field set to 10. The "Factor Header Score Into Line" option has a "Header Score into Line Score" field set to .0000.
- Event Lines:** A table with columns: New Item, Add New Item, Item Number, Item Description, Additional Line Info, Line Type, Commodity Code, and Quantity. The table shows one record with "NEW" in the "Add New Item" column and "Edit" in the "Additional Line Info" column.

A speech bubble on the right side of the interface contains the text: **Total Score = Header + Lines**.

# Enter Header Questions

The screenshot shows the Oracle Event Workbench interface for creating an event question. The form includes the following fields and options:

- Event Number:** 34260
- Business Unit:** 30
- Bid Question Type:** List (dropdown menu)
- Bid Question Number:** 10
- Bid Question Code:** TL1
- Description:** List your branches
- Bid Question:** List your branches (text area)
- Weighting:** 100.0000
- Response Required:**
- Allow Multiple Selection:**
- Ideal:** Denver
- Add To Template:**
- Display Bid Question:**

Buttons at the bottom include: Save and Add New, Save and Close, Cancel, and List Items. A Search Template link is also present.

**Pull from Template, or add on the fly**

# Example of Multiple Values Question

ORACLE

EnterpriseOne Menu

Open Applications: Header Question List

New Window

Fast Path: G43Q

Back to Navigation by Role

Operational Sourcing

Daily Processing

Event Workbench

RFX Print

Setup

Sourcing Constants

Bid Questions Setup

Print Message

Revisions

Event Workbench - Header Question List

Records 1 - 7

List Item	List Score
<input type="radio"/> New York	15.0000
<input type="radio"/> Seattle	20.0000
<input type="radio"/> Denver	30.0000
<input type="radio"/> Baltimore	10.0000
<input type="radio"/> Los Angeles	10.0000
<input checked="" type="radio"/> San Francisco	15.0000
<input type="radio"/>	

Delete

Save

Save and Close

Sign Out

Create lists of values for "List" Questions

# Different Question Types

The screenshot displays the Oracle EnterpriseOne Event Workbench interface for configuring bid questions. The main window title is "Event Workbench - Event Header Bid Questions".

**Event Header Information:**

- Event Number: 34260
- Business Unit: 30

**Form Fields:**

- Total Weighting: 100.0000
- Bid Question Code: TL1
- Bid Question Number: 10
- Description: List your branches
- Bid Question Type: List (dropdown menu)
- Bid Question: List your branches (text area)
- Weighting: 100.0000
- Ideal: Denver
- Response Required:
- Allow Multiple Selection:
- Display Bid Question:

**Records Table:**

Description	Weighting	Bid Question Code
List your branches	100.0000	TL1

**Buttons:** Add, Change, Delete, Cancel, List Items

**Callout Box:** Price, List, Date, Yes/No, Money, and Numeric

# Invite Bidders

Vendors, Known Bidders with Vendor Master, or Add new Bidder on the fly

The screenshot shows the Oracle EnterpriseOne interface for 'Event Workbench - Event Bidders - Search and Select Bidders'. The interface includes a search form with fields for Search Type, Address Number (4343), Alpha Name, and Sort By. A 'Find' button is present. Below the search form are two tables: 'Available Bidders' and 'Selected Bidders'. The 'Available Bidders' table shows one record for 'Parts Emporium' with address number 4343 and type 'Supplier'. The 'Selected Bidders' table shows the same record with an additional 'Send Method' column set to 'Email'. Buttons for 'Select Bidder' and 'Add Adhoc Bidder' are located below the 'Available Bidders' table.

**Search Form:**

- Search Type: -- Select One --
- Address Number: 4343
- Alpha Name: [Empty]
- Sort By: -- Select One --
- Sort Order:  Ascending  Descending

**Available Bidders Table:**

Address Number	Company Name	Type
4343	Parts Emporium	Supplier

**Selected Bidders Table:**

Address Number	Company Name	Type	Send Method
4343	Parts Emporium	Supplier	Email

# Add Line Items in an RFx

The screenshot displays the Oracle EnterpriseOne interface for adding line items in an RFx. The top navigation bar includes the Oracle logo and a 'Sign Out' link. The left sidebar contains the 'EnterpriseOne Menu' with sections for 'Open Applications', 'Fast Path', and 'Back to Navigation by Role'. The main content area shows the 'Event Description' as 'Demo of RFx' and the 'Event End Date/Time' as '01/28/06 13:06:20'. Below this, there are tabs for 'Properties', 'Scoring', 'Payment', 'Contact Info', and 'Event Attachments'. The 'Scoring' tab is active, showing options for 'Assign Header Weighting' (selected) and 'Factor Header Score Into Line'. The 'Header Weighting' is set to '10.0000' and the 'Header Score into Line Score' is set to '.0000'. At the bottom, there are buttons for 'Copy From RFI', 'Copy From RFx', and 'Copy From BOM'. The 'Event Lines' section shows a table with columns for 'New Item', 'Add New Item', 'Item Number', 'Item Description', 'Additional Line Info', 'Line Type', 'Commodity Code', and 'Quantity'. A single row is visible with 'NEW' in the 'Add New Item' column, '210' in the 'Item Number' column, and '1000.0' in the 'Quantity' column. A callout bubble points to the 'NEW' button with the text 'Create new Item masters on the fly'. At the bottom of the interface, there are buttons for 'Cancel Line', 'Save Changes', 'Save and Close', 'Submit', and 'Cancel'.

	New Item	Add New Item	Item Number	Item Description	Additional Line Info	Line Type	Commodity Code	Quantity
<input checked="" type="radio"/>	<input type="checkbox"/>	NEW	210		Edit	S		1000.0

Create new Item masters on the fly

# Purchase by Item or G/L Account

The screenshot displays the Oracle EnterpriseOne interface for configuring a purchase event. The main window title is "ORACLE" and the user is signed out. The left sidebar shows the "EnterpriseOne Menu" with "Open Applications" and "Fast Path" sections. The main content area shows the "Event Description" as "Demo of RFX" and the "Event End Date/Time" as "01/28/06 13:06:20". Below this, there are tabs for "Properties", "Scoring", "Payment", "Contact Info", and "Event Attachments". The "Scoring" tab is active, showing two radio button options: "Assign Header Weighting" (selected) and "Factor Header Score Into Line". The "Header Weighting" field is set to "10.0000" and the "Header Score into Line Score" field is set to ".0000". Below these fields are links for "Copy From RFI", "Copy From RFX", and "Copy From BOM". The "Event Lines" section is expanded, showing a table with columns: "Sub", "Obj Acct", "Cost Center", "Bid Required", "Total Question Weight", "Event Line Bid Questions", and "Event Line Status". The table contains two rows, both with empty cells. Below the table are buttons for "Cancel Line", "Save Changes", "Save and Close", "Submit", and "Cancel". A callout box points to the "Obj Acct" column with the text "GL Accounts and Service Commodities".

**GL Accounts  
and Service  
Commodities**

# Line Items must ask for a Price

**ORACLE**

EnterpriseOne Menu

Open Applications: Event Line Bid Questions

New Window

Fast Path: G43Q

Back to Navigation by Role

Operational Sourcing

Daily Processing

Event Workbench

RFx Print

Setup

Sourcing Constants

Bid Questions Setup

Print Message

Revisions

Event Line Bid Questions

Event Number 34260 Event Line Number 1 Business Unit 30

Item Number 210 Description Mountain Bike, Red Commodity Code BIKES

Total Weighting 100.0000

Description	Weighting	Bid Qu Co
Price Template	100.0000	TP

Bid Question Code TP1 Bid Question Number 10

Description Price Template

Bid Question Type Price

Bid Question What is the price of the itme

Weighting 100.0000  Response Required

Best Price 10.0000 Worst Price 20.0000

Display Bid Question

Allow Out of Range

Display Range

Price Components Price Quantity Break

Add Change Delete

Cancel

Default question added if you don't put it in

# Sourcing Create Event

- Tables

- F43Q10 – Event Header
- F43Q11 – Event Line
- F43Q15 – Event Currency
- F43Q30 – Event Invited Bidders
- F43Q35 – Event Bidder Password Temp Table
- F43Q92 – Ad Hoc Item definition
- F43Q20 – Event Header Bid Question
- F43Q201 – Event Header Bid Question List
- F43Q21 – Event Detail Bid Question
- F43Q211 – Event Detail Bid Question List
- F43Q212 – Event Detail Bid Question Price Component
- F43Q213 – Event Detail Bid Question Price Break

# Other Details

- Question Templates
- Printing the RFx
- Sourcing Constants

# Templates Store Multiple Questions for an Item or Commodity

**ORACLE**

EnterpriseOne Menu

Open Applications:

- Bid Questions Template Setup
- Search for Bid Questions

New Window

Fast Path:

G43Q

Back to Navigation by Role

Operational Sourcing

- ▷ Daily Processing
- ▷ Setup
  - Sourcing Constants
  - Bid Questions Setup
  - Print Message
  - Revisions

Bid Questions Setup - Bid Questions Template Setup - Search for Bid Questions

Close

Bid Question Code: [ ] Description: \*

Status: -- Select One -- Bid Question Type: -- Select One --

Item Number: [ ] Commodity Code: \*

Start Effective Date From: [ ] To: [ ]

End Effective Date From: [ ] To: [ ]

Header Question Only

Sort By: -- Select One -- Ascending Descending

Find

Records 1 - 1 Customize Grid

Bid Question code	Description
TP1	Price Template

Bid Question Template Details

Bid Question Code: TP1

Description: Price Template

Effective Date - Start: 01/01/06 End: 01/01/09

Bid Question Type: Price

Bid Question Status: Active  Allow Out of Range

Item Number: [ ]

Commodity Code: [ ]

Bid Question: What is the price of the itmae

Weighting: 100.0000  Response Required

Best Response: 10.00

Weight Response: 20.00

Useful for repeat events

# Price Questions Required for Lines

**ORACLE**

EnterpriseOne Menu

Open Applications:

- Bid Question Template Setup - Edit Bid Question Template

New Window

Fast Path:

G43Q

Back to Navigation by Role

Operational Sourcing

- Daily Processing
- Setup
  - Sourcing Constants
  - Bid Questions Setup
  - Print Message Revisions

Bid Questions Setup - Bid Question Template Setup - Edit Bid Question Template

Sign Out

Bid Question Type: Price

Bid Question Status: Active

Bid Question Code: TP1

Description: Price Template

Item Number: [Empty]

Commodity Code: [Empty]

Effective Date From: 01/01/06

Effective Date To: 01/01/09

Bid Question: What is the price of the itme

Response Required

Allow Out of Range

Weighting: 100.0000

Best Response: 10.00

Worst Response: 20.00

[List of Components](#)

Save and Close Save and Add New Cancel

**Best/Worst response guides the scoring**

**Handle out-of-range responses as 100% or 0%**

# Monetary, Price, Numeric, Yes/No, Date, and List Question types

**ORACLE** Sign Out

**EnterpriseOne Menu**

**Open Applications:**

- Bid Question Template Setup - Add Bid Question Template
- New Window

**Fast Path:**

G43Q

**Back to Navigation by Role**

- Operational Sourcing
  - Daily Processing
  - Setup
    - Sourcing Constants
    - Bid Questions Setup**
    - Print Message
    - Revisions

**Bid Questions Setup - Bid Question Template Setup - Add Bid Question Template**

Bid Question Type: List  
Bid Question Code: TL1  
Bid Question Status: Active  Header Question Only  
Description: List your branches  
Item Number:   
Commodity Code:   
Effective Date From:  Effective Date To:   
Bid Question: List your branches  
 Response Required  Allow Multiple Selection  
Weighting: 100.0000  
Ideal: Denver  
[List of Values](#)

Save and Close Save and Add New Cancel

**Date Range your Questions**

# Developing a List of Values

The screenshot displays the Oracle EnterpriseOne interface. On the left is the 'EnterpriseOne Menu' with 'Operational Sourcing' expanded to 'Bid Questions Setup'. The main area shows a 'Bid Question' form with fields for 'Commodity Code', 'Effective Date From' (01/27/07), 'Effective Date To' (01/12/07), 'Bid Question' (List your bid...), 'Response Required' (checked), 'Weighting' (100.0000), and 'Ideal' (Denver). Below the form are 'Save and Close', 'Save and Add New', and 'Cancel' buttons. A callout box points to the 'Bid Question' field with the text: 'Idea: A buyer's BOM for sourcing a set of direct materials'. Below the form is a 'List Items' window showing a table of items and their scores.

List Item	List Score
New York	15.0000
Seattle	20.0000
Denver	30.0000
Baltimore	10.0000
Los Angeles	10.0000
San Francisco	15.0000

# Sourcing Question Template

- Tables
  - F43Q60 – Bid Question
  - F43Q61 – Bid Question List Values
  - F43Q62 – Bid Question Price Components

# Buyer Can Print RFx – and send to Bidder

**Processing Options**

Event Header | Header Question | Detail Line Question

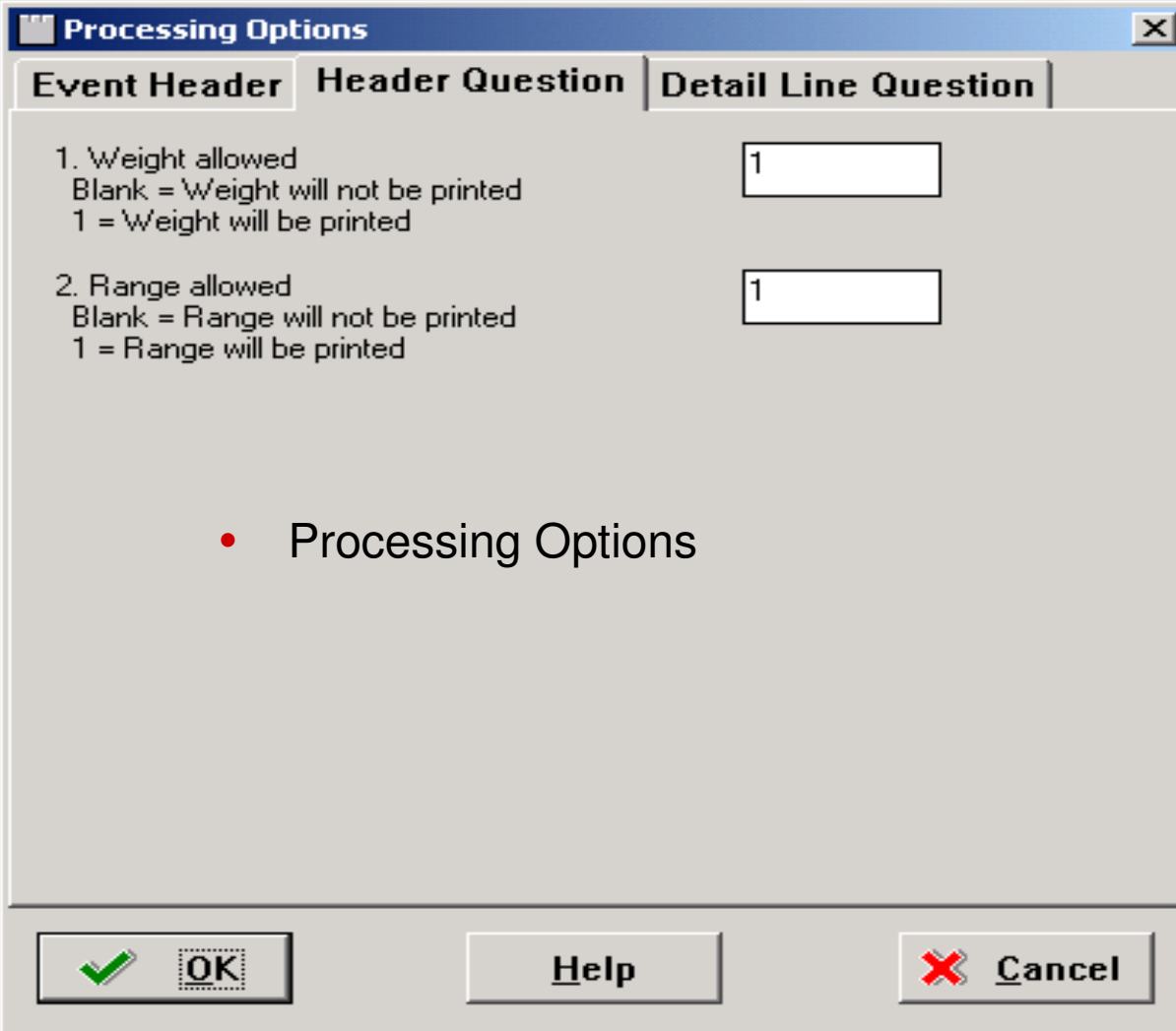
1. Print Invited Bidder List   
Blank = Invited bidder list will not be printed  
1 = Invited bidder list will be printed

- Processing Options

OK Help Cancel

**Note: Bidder cannot print from their portal**

# How Much Do You Want to Show?




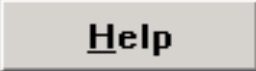
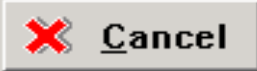
**Processing Options**

**Event Header** | **Header Question** | **Detail Line Question**

1. Weight allowed  
Blank = Weight will not be printed  
1 = Weight will be printed

2. Range allowed  
Blank = Range will not be printed  
1 = Range will be printed

- Processing Options

# How Much Do You Want to Show?

**Processing Options**

**Event Header | Header Question | Detail Line Question**

1. Weight allowed  
Blank = Weight will not be printed  
1 = Weight will be printed

2. Range allowed  
Blank = Range will not be printed  
1 = Range will be printed

- Processing Options

OK Help Cancel

# PDF Print of Sourcing Event Header

Adobe Reader - [R43Q110\_XJDE0001\_D060202\_T110829305.pdf]

File Edit View Document Tools Window Help

75%

Help Try Acrobat for Free!

**Pages**

R43Q110 Worldwide Company Date - 02/02/06  
 RFX Print Time - 11:08:53  
 Page - 1

Event Number 34260 Event Preview Start Time 01/27/06 11:06:20  
 Event Format RFX Event Start Time 01/27/06 13:06:20  
 Business Unit 30 Eastern Distribution Center Event End Time 02/01/06 1:06:20  
 Event Name Demo of RFX

---

Event Currency U.S. Dollar Event Status Pending Award

**Buyer Contact Information**

Address Number	Name	Phone Number	Email
4343	Parto Emporium	303-722-5154	Part@emp.com

**Terms and Condition**

Please accept all my terms and condition without reading.  
 Thank you

I agree  I do not agree

Event Payment Method . Payment Terms Net 30 Days

**Invited Bidders**

Address Number	Name	Phone Number	Email
4343	Parto Emporium		mario.perez@oracle.com

**Event Header Questions**

Bid Question Number 10 Bid Question Code TL1  
 List your branches  
 Select one or more

\_\_\_\_\_ New York  
 \_\_\_\_\_ Seattle  
 \_\_\_\_\_ Denver  
 \_\_\_\_\_ Baltimore  
 \_\_\_\_\_ Los Angeles  
 \_\_\_\_\_ San Francisco

Bid Question Type List  
 Weight 100.0000  
 Ideal Denver

**Attachments**

**Comments**

1 of 2

# PDF Print of Sourcing Event Lines

Adobe Reader - [R43Q110\_XJDE0001\_D060202\_T110829305.pdf]

File Edit View Document Tools Window Help

75%

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R43Q110 Worldwide Company Date - 02/02/06  
RFX Print Time - 11:08:53  
Page - 2

Event Number 34260 Event Preview Start Time 01/27/06 11:06:20  
Event Format RFX Event Start Time 01/27/06 13:06:20  
Business Unit 30 Eastern Distribution Center Event End Time 02/01/06 1:06:20  
Event Name Demo of RFX

---

Event Line Number	1	Item Number	210	Description	Mountain Bike, Red
Commodity Code	BIKES	Unit Of Measure	Each	Requested Date	02/10/06
Quantity	1000.0000			Promised Date	

---

Event Line Questions

Bid Question Number	10	Bid Question Code	TP1
What is the price of the item			
Bid Question Type	Price		
Weight	100.0000		

# Sourcing Constants (defaults) – RFx

**ORACLE**

EnterpriseOne Menu

Open Applications:

- Sourcing Constants
- New Window

Fast Path:

G43Q

Back to Navigation by Role

Operational Sourcing

- Daily Processing
- Setup
  - Sourcing Constants
    - Bid Questions Setup
    - Print Message Revisions

**Sourcing Constants - Sourcing Constants**

General Event Information

Supplier Search Type:  Suppliers

Bidder Search Type:  Bidder

Commodity Level Search:  All Levels

Bidder Role:

Supplier Role:

Question Number Increment Factor:

Sourcing Primary Contact Type:  Decision Maker

Event Dates/Times

Bid Question End Effective Date:

Event Preview Default Time/UOM:  H

Event Start Default Time/UOM:  H

Event End Default Time/UOM:  D

RFx Properties | RFI Properties | Analyze Properties | Sourcing Messages

Bid Required

Display Bid Question Weights

Display Bid History Page

Default Price Bid Question Code:

RFx Document Type:  Purchase Order

Create Blanket Or PO:  Purchase Order

Line Quantity Required

Sealed Event

Allow Manual Extensions

Submit Close

Done Local intranet

**In order to Preview responses**

**If you want to extend event dates**

# Sourcing Constants (defaults) – RFI

**ORACLE** Sign Out

EnterpriseOne Menu

Open Applications: Sourcing Constants New Window

Fast Path: G43Q

Back to Navigation by Role

Operational Sourcing

Daily Processing

Setup

Sourcing Constants

Bid Questions Setup

Print Message Revisions

### Sourcing Constants - Sourcing Constants

**General Event Information**

Supplier Search Type  Suppliers

Bidder Search Type  Bidder

Commodity Level Search  All Levels

Bidder Role

Supplier Role

Question Number Increment Factor

Sourcing Primary Contact Type  Decision Maker

**Event Dates/Times**

Bid Question End Effective Date

Event Preview Default Time/UOM  H

Event Start Default Time/UOM  H

Event End Default Time/UOM  D

RFx Properties **RFI Properties** Analyze Properties Sourcing Messages

Bid Required  Allow Manual Extensions

Display Bid Question Weights RFI Document Type  Purchase Order

Display Bid History Page

Score RFI Event

Submit Close

Done Local intranet

**No OP/OB or award for RFI's**

# Sourcing Constants (defaults) - Analyze

The screenshot displays the Oracle Sourcing Constants - Analyze Properties page. The browser window title is "Sourcing Constants - Sourcing Constants - Microsoft Internet Explorer provided by J.D. Edwards". The address bar shows "http://localhost:7080/jde/E1Menu.maf".

The page layout includes:

- EnterpriseOne Menu:** Open Applications (Sourcing Constants, New Window), Fast Path (G43Q), Back to Navigation by Role, Operational Sourcing (Daily Processing, Setup, Sourcing Constants, Bid Questions Setup, Print Message, Revisions).
- Sourcing Constants - Sourcing Constants:**
  - General Event Information:** Supplier Search Type (v Suppliers), Bidder Search Type (B Bidder), Commodity Level Search (al All Levels), Bidder Role (OWVIEW1), Supplier Role (OWVIEW1), Question Number Increment Factor (10), Sourcing Primary Contact Type (D Decision Maker).
  - Event Dates/Times:** Bid Question End Effective Date (01/12/07), Event Preview Default Time/UOM (1 H), Event Start Default Time/UOM (2 H), Event End Default Time/UOM (1 D).
  - Analyze Properties (Alt+3):** Display All Bids, Show Award Details, Display Bid Scores, Display Total Bid Price, Display Bid Questions. All checkboxes are checked.

A callout bubble points to the Analyze Properties section with the text: "Normally all are turned on".

# Sourcing Constants (defaults) – Messages

**ORACLE**

EnterpriseOne Menu

Open Applications: Sourcing Constants

Fast Path: G43Q

Back to Navigation by Role

Operational Sourcing

Daily Processing

Setup

Sourcing Constants

Bid Questions Setup

Print Message Revisions

**Sourcing Constants - Sourcing Constants**

General Event Information

Supplier Search Type:  Suppliers

Bidder Search Type:  Bidder

Commodity Level Search:  All Levels

Bidder Role:

Supplier Role:

Question Number Increment Factor:

Sourcing Primary Contact Type:  Decision Maker

Event Dates/Times

Bid Question End Effective Date:

Event Preview Default Time/UOM:  H

Event Start Default Time/UOM:  H

Event End Default Time/UOM:  D

RFx Properties | RFI Properties | Analyze Properties | **Sourcing Messages**

Event Invite Send Message:

Event End Send Message:

Password Send Message:

Event Cancel Send Message:

Event Extend Send Message:

Invite Terms and Conditions:

Event Pause Send Message:

Event Award Send Message:

Event Resume Send Message:

Unsuccessful Bid Send Mess...:

Bidder URL:

Submit Close

**Boiler-Plate "Print" messages**

# Sourcing Constants – T&C Message

- G43Q

The screenshot shows the Oracle EnterpriseOne web interface. The browser title is "Print Message Revisions - Work With Print Message - Microsoft Internet Explorer provided by J.D. Edwards". The address bar shows "http://localhost:7080/jde/E1Menu.maf". The Oracle logo is at the top left. The main content area is titled "Print Message Revisions - Work With Print Message". It features a search bar with "BIDT&C" entered, a "To Language" dropdown, and an "Omit Expired Messages" checkbox. Below this is a table with one record:

Print Message	Description	Eff Date	Expired Date
BIDT&C	Bidder Terms and Conditions	01/27/06	12/31/15

A callout bubble points to the table with the text "T&C Print Message text". The left sidebar contains the "EnterpriseOne Menu" with "Operational Sourcing" expanded to "Print Message Revisions".

# Sourcing Constants

- Tables
  - F43Q90 – Sourcing Constants

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