

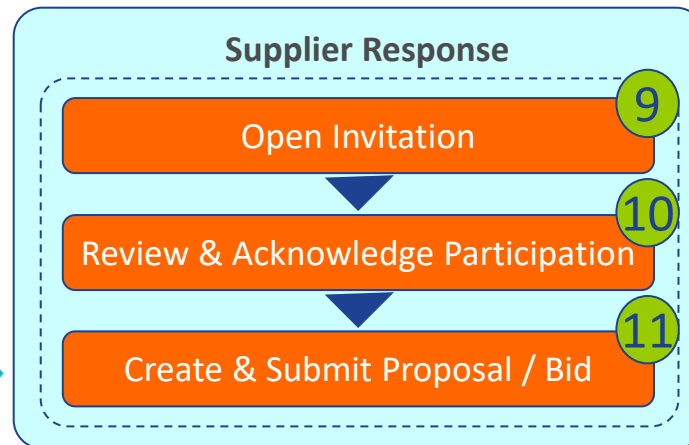
Oracle Sourcing

Quick Start Guide



GE imagination at work

RFI, RFX, Auction Process



Create RFI, RFQ or Auction

- Select

+ GE(US) Sourcing Buyer

+ Sourcing

+ Sourcing Homepage

Oracle Applications Home Page

Main Menu

- GEE AMER Sourcing Super User
- GEHBS Sourcing Super User
 - Sourcing**
 - Sourcing Home Page**
 - Approve/Reject Supplier
 - Users
 - Worklist

Worklist

From	Type	Subject	Sent	Due
Sinha, Prashant	Sourcing Negotiation	Open for bidding: Auction 2185 (Test Auction)	21-Jan-2011	
Sinha, Prashant	Sourcing Negotiation	Open for bidding: Auction 2120 (Office Supplies)	19-Jan-2011	
Sinha, Prashant	Sourcing Negotiation	Open for quoting: RFQ 2103 (Test RFQ)	17-Jan-2011	

TIP Vacation Rules - Redirect or auto-respond to notifications.
 TIP Worklist Access - Specify which users can view and act upon your notifications.

- Select Create RFI, RFQ or Auction

Oracle Sourcing

Negotiations Intelligence Administration

Search Published Negotiations: Number [] Go Advanced Search

Published Negotiations

Number	Title	Type	Time Left	Role	Responses	Monitor
2103	Test RFQ	RFQ	20 hours 24 minutes	Owner	0	

Quick Links

Create	Manage	Templates	Reusable Lists
<ul style="list-style-type: none"> RFI RFQ Auction Copy Event 	<ul style="list-style-type: none"> Drafts Events Draft Surrogate Responses Supplier Research 	<ul style="list-style-type: none"> RFI RFQ Auction 	<ul style="list-style-type: none"> Invitation Attribute Requirement Cost Factor

Dev URL: <http://ospcdev.corporate.ge.com:8051>

Stage URL:

Production:



Step 1: Input Header Details

- Enter a **Title**
- **Negotiation Style** : Standard Negotiation
- **Quote Style** : Blind
- **Event** : Blank
- **Security Level** : Public
- **Description** : Optional
- **Operating Unit** : Your Business Unit
- **Outcome** : Standard Purchase Order

ORACLE Sourcing

Negotiations Intelligence Administration

Create Auction 2107: Header

* Indicates required field

* Title [] Buyer **Sinha, Prashant**

Negotiation Style Standard Negotiation * Operating Unit GE Home and Business Solutions

Bid Style Open Outcome Standard Purchase Order

Event []

Security Level Public

Description []

Cancel Apply Template Online D

Collaboration Team

Select Members: **Notify**

Select All | Select None

Select	*Member	Position	Approver	Access	Task	Target Date
<input type="checkbox"/>	Sinha, Prashant		<input type="checkbox"/>	Full	[]	[]

Add Another Row

Terms

Ship-To Address Appliance Park

Currency

Currency **USD** Price Precision Any

Requirements

Step 2: Manage Collaboration Team

- Internal users who have specific access to the negotiation

- Creator is added as default and cannot be removed
- Additional team members may be added if desired by clicking on **Add Another Row** and searching for team members

- Access can be set for team members:

- **Full** : can perform most activities
 Only the owner can publish, close early, extend, create amendment
- **Scoring** : members can contribute by scoring supplier responses
- **View Only** : members can only view the negotiation

Collaboration Team

Select Members:

[Select All](#) | [Select None](#)

Select *Member	Position	Approver	Access	Task	Target Date
<input type="checkbox"/> Sinha, Prashant		<input type="checkbox"/>	Full		

Terms

Ship-To Address:

Currency

Currency: USD

Price Precision: Any

Requirements

Note:

- (optional) Buyer can select if a member is an Approver by checking the box below **'Approver'**. Buyer can also assign Task and Target date.
- Collaboration team may be template driven

Step 3: Add Requirements

Requirements are questions that the supplier should answer as part of supplier response

Requirements

Display Scoring Criteria to Suppliers: No Yes

Select Requirement: | Actions:

| | |

Select Focus Title	Type	Target	Maximum Score	Update
<input type="checkbox"/>	Requirements			

Grand Total

Maximum Score: 0

- Check box for Requirements and Click **Add Section** and enter a Section Name
- Click **Apply and Add Requirement**
 - Create a question
 - Select Properties and Apply

Requirements can be optional, required, or view only
 Answers can be set drop down lists or open free responses
 Responses can be auto-scored
 Team members with Full or Scoring access can rate the responses

ORACLE Sourcing

Header: Add Section (Auction 2187)

* Indicates required field

Add:

* Name:

TIP: You need to add requirements to the section before you publish the negotiation.

Header: Add Requirement (RFQ 2068)

* Indicates required field

Section: **Test Section 1**

* Requirement: Requirement

View HTML Source

Test question 1 - just enter a free text answer

Properties

Type:

Value Type:

Target:

Scoring Method:

Maximum Score:

Knockout Score:

Display To Supplier

Acceptable Values

Response Value

No results found.

Step 3: Add Requirements

An example of Section and Question added to the **Requirement** section of the header

Currency USD Price Precision Any Manage Response Currencies

Requirements

Display Scoring Criteria to Suppliers No Select Scoring Settings

Select Requirement: Add Section Add Requirement Move Delete | Actions Equalize Weights Go

[Select All](#) | [Select None](#) | [Expand All](#) | [Collapse All](#)

Select	Focus	Title	Type	Target	Weight	Maximum Score	Update
<input type="checkbox"/>		Requirements					
<input type="checkbox"/>		Business					
<input type="checkbox"/>		What is your total number of employee	Optional			5	
<input type="checkbox"/>		What is your website URL?	Optional				
<input type="checkbox"/>		What is the date of your fiscal year end?	Optional				
<input type="checkbox"/>		Describe your company philosophy	Optional				
<input type="checkbox"/>		Management					
<input type="checkbox"/>		Financial					

Grand Total

Weight 0 Recalculate

Note:

Requirements can be entered through multiple means:

- Create in UI
- Can be template driven
- Bulk upload Excel template

Step 4: Manage Terms/Attachments

Terms

- **Bill-To Address:** defaulted to main GE plant

- **Currency:** Base currency is displayed.

(Optional) Response currencies may be set so that suppliers can quote in local currency and the system will automatically convert to the base

Additional Header Attributes

- **Test Auction:** Set to Yes or No. Only flags the negotiation as test or live for reporting purposes

- **Category:** Select appropriate Category

Notes and Attachments

(Optional) Provides additional information to suppliers

The screenshot shows a software interface for managing terms and attachments. Several sections are highlighted with orange boxes:

- Terms:** A dropdown menu for 'Ship-To Address' is set to 'Appliance Park'.
- Currency:** A button labeled 'Manage Response Currencies' is highlighted.
- Requirements:** A table with columns for 'Select Focus Title', 'Type', 'Target', 'Maximum Score', and 'Update'. The first row is 'Requirements' with a checkbox.
- Additional Header Attributes (Buyer Only):** Two dropdown menus are visible: '* Test Negotiation' set to 'No' and '* Category *Test*' set to 'DIRECT MATERIALS'.
- Notes and Attachments:** A text area for 'Note to Suppliers' and a button for 'Add Attachment...' are highlighted.

Step 5: Create Lines

- Click on “**Lines**” tab from the left menu

- Select **Display Rank As and Ranking**

- Select **Create Line** from Actions drop down and click Go

- Enter required fields and click Apply

- Description is free text

- Start/Target/Current price is optional

- **Attributes (optional)**

Attributes are used to describe the good or service being purchased. They identify characteristics which will be negotiated on in addition to item price. To add attributes, click Add Another Row or Add Attribute List. In a Multi-Attribute Weighted Scoring negotiation, you can assign weights and scores to attributes.

ORACLE Sourcing

Negotiations Intelligence Administration

Create Auction 2109: Lines

Display Rank As: 1,2,3...
Ranking: Price Only

Actions: Create Line [Go]

Select Line	Item, Rev	Category	Unit	Quantity	Add Line	Requisition
No results found.						

ORACLE Sourcing

Negotiations Intelligence Administration

Lines: Create Line 1 (Auction 2109)

* Indicates required field

Line Type: Goods [Go]
* Description: [Text Field]
* Category: [Dropdown]
Unit of Measure: Bi-Weekly [Dropdown]
* Quantity: [Text Field]
* Ship-To Address: Appliance Park [Dropdown]

Currency: USD
Price Precision: Any decimal places
Start Price: [Text Field]
Target Price: [Text Field]
Current Price: [Text Field]
Need-By From: [Text Field]
Need-By To: [Text Field]

Attribute

Sequence	Attribute	Group	Attribute Type	Value Type	Target Value
No results found.					

Notes and Attachments

Note to Suppliers: [Text Area]

Title	Type	Description	Category	Last Updated By	Last Updated
No results found.					

Step 6: Set Controls & Event Timings

- Click on “**Controls**” tab from the left menu

- Set Schedule

- **Preview Date:** in this period, all eligible Suppliers may view the RFx/Auction but not submit responses.

- **Open Date:** The date and time the negotiation opens.

- **Close Date:** The date and time the negotiation closes. Once closed, no further responses may be accepted.

- **Award Date** (RFQs and auctions): The date and time by which RFQ/Auction will be awarded.

- Review Response Rules

ORACLE Sourcing Navigator Favorites Home Logout Preferences Help Diagnostics

Negotiations Intelligence Administration

Header: Create Auction 2187: Controls
* Indicates required field

Cancel Online Discussions Save as Draft Review

Header: Lines Controls Suppliers

Schedule

Preview Date Immediately Specify Time
* Close Date (example: 22-Jan-2011 19:45:00) Staggered Closing

Open Date Immediately Specify Time
Award Date

Response Rules

- Restrict to invited suppliers
- Allow supplier to select lines on which to respond
- Display best price to suppliers
- Require full quantity
- Allow multiple responses
- Allow multiple rounds of negotiation
- Suppliers are required to lower the line price when submitting a revised response
- Allow manual close before the Close Date
- Allow manual extend when the negotiation is open
- Allow AutoExtend

AutoExtend Settings

Lowest Triggering Response Rank Blank field will allow any triggering response.

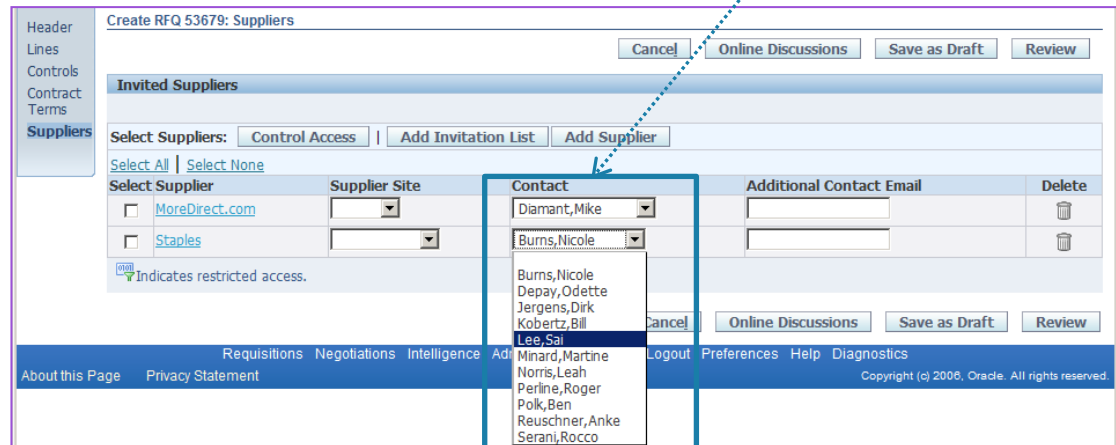
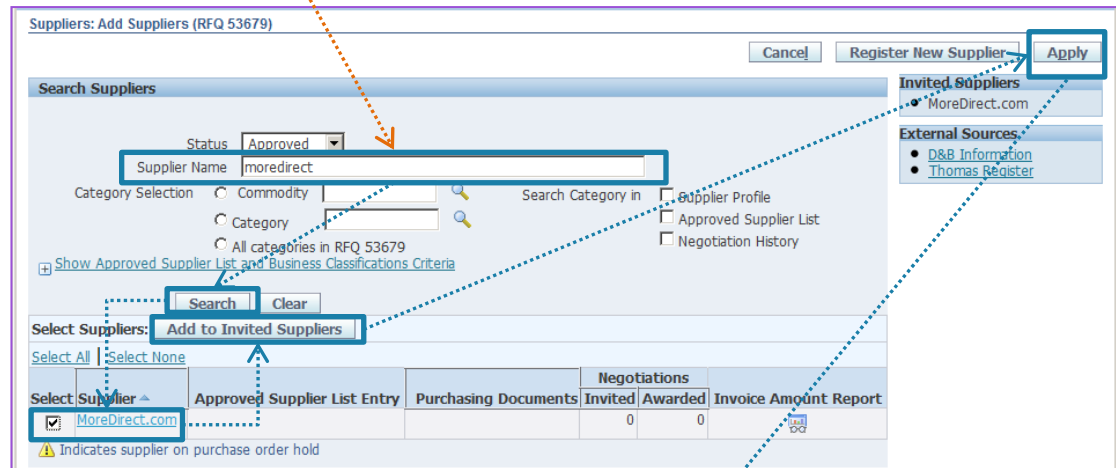
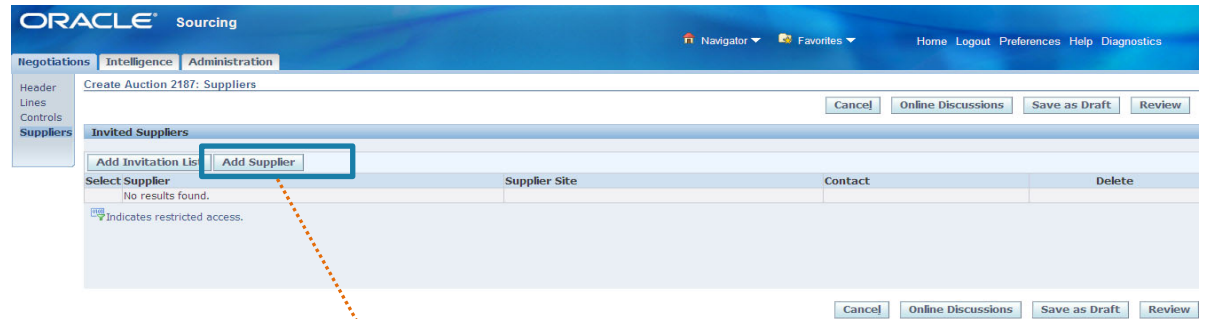
Lines to AutoExtend All Lines Lines that have triggered AutoExtend

Start Time of Extensions Close Date Receipt time of the triggering response

* AutoExtend Period (minutes)

Step 7: Select Suppliers

- Click on **“Suppliers”** tab from the left menu
- Click **Add Supplier**
- Enter supplier name and click **Search**
- Click **Add to Invited Suppliers**
- Repeat search for other suppliers as desired
- Click **Apply**
- Ensure that the Contact Name for the supplier is the contact in the supplier table
- If supplier or supplier contact not found, click on **Register New Supplier**. This will link to Aravo ([pending setup in Dev, details to follow](#))



Step 8: Review & Publish

- After adding suppliers, click **Review**
- If changes are required, click **Update**
- If ready, click **Publish**

The invited suppliers will receive email notification to participate in the negotiation

ORACLE Sourcing Navigator Favorites Home Logout Preferences Help Diagnostics

Negotiations Intelligence Administration

Create Auction 2187: Review

Title: **General Supplies** Status: **Draft**

Buyer: **Sinha, Prashant** Approval Status: **Requires No Approval**
 Negotiation Style: **Standard Negotiation** Operating Unit: **GE Home and Business Solutions**
 Bid Style: **Blind** Outcome: **Standard Purchase Order**
 Security Level: **Public** Event:
 Description:

Collaboration Team

Member	Position	Approver	Access	Task	Target Date	Task Completed	Last Notified
Sinha, Prashant		No	Full				

Terms

Bill-To Address: [Appliance Park](#) Payment Terms:
 Ship-To Address: [Appliance Park](#) Carrier:
 FOB Freight Terms:

Currency

Auction Currency: **USD** Price Precision: **Any**

Requirements

Display Scoring criteria to Suppliers: **No**

Details Section	Scoring Team	Maximum Score
No results found.		
		Total 0

Abstract and Forms

Supplier Response

Step 9: Open Invitation

- Published negotiations will show up under “**You Company’s Open Invitations**”

- Click on the Negotiation Number

The screenshot displays the Oracle Sourcing web application interface. At the top, the Oracle Sourcing logo is visible, along with navigation and favorites icons. Below the header, there is a search bar for open negotiations and a welcome message for Kenny Powers. The main content area is divided into two sections: 'Your Active and Draft Responses' and 'Your Company's Open Invitations'.

Your Active and Draft Responses

Response Number	Response Status	Supplier Site	Negotiation Number	Title	Type	Time Left	Monitor	Unread Messages
1031	Draft		2185	Test Auction	Auction	3 days 17 hours		0
14	Active		2015	template test 3	Auction	0 seconds		0
27	Active		2048	test alternate currency	Auction	0 seconds		0
29	Draft		2035	JP Publish Error Test	Auction	0 seconds		0
1025	Active		2112	Demo auction 1-18	Auction	0 seconds		0

Your Company's Open Invitations

Supplier Site	Negotiation Number	Title	Type	Time Left
	2184	Test eAuctions for Motors	Auction	2 days 14 hours
	2136	Test Stamping RFQ	RFQ	2 days 16 hours
	2187	General Supplies	Auction	2 days 23 hours
	2036	JP Publish Error Test RFI	RFI	3 days 9 hours
	2037	JP Publish Error Test RFQ	RFQ	3 days 10 hours

Quick Links

Manage	View Responses
<ul style="list-style-type: none"> Drafts Personal Information 	<ul style="list-style-type: none"> Active Disqualified Awarded Rejected

Step 10: Review & Acknowledge Participation

- Review the negotiation under Header, Lines and Controls
- Under Action select "Acknowledge Participation" (default) and click GO

ORACLE Sourcing

Navigator Favorites Home Logout Preferences Help Diagnostics

Negotiations > Auction: 2187

Title: General Supplies
Status: Active
Time Left: 2 days 23 hours

Open Date: 23-Jan-2011 00:25:39
Close Date: 25-Jan-2011 23:41:25

Buyer: Sinha, Prashant
Bid Style: Blind
Description: Standard Purchase Order

Outcome: Event

Actions: Acknowledge Participation **Go**

Header Lines Controls

Terms

Currency: Auction Currency USD Price Precision Any

Requirements

Details Section: No results found.

Additional Header Attributes (Buyer & Supplier)

Notes and Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Return to Negotiations

Actions: Acknowledge Participation **Go**

- Enter Note to Buyer (optional) and click Apply

ORACLE Sourcing

Navigator Favorites Home Logout Preferences Help Diagnostics

Negotiations > Auction: 2187 > Acknowledge Participation (Auction 2187)

Will your company participate? Yes No

Note to Buyer: We plan to participate

Cancel **Apply**

Cancel **Apply**

Step 11: Create & Submit Bid/Proposal

- Under Action select **Create Bid** and click **GO**

ORACLE Sourcing

Negotiations > Auction: 2187

Title: General Supplies
Status: Active
Time Left: 2 days 23 hours

Open Date: 23-Jan-2011 00:00
Close Date: 25-Jan-2011 23:41:25

Buyer: Sinha, Prashant
Bid Style: Blind

Outcome Event: Standard Purch

Actions: Acknowledge Participation, Acknowledge Participation, **Create Bid**, Online Discussions, View Bid History, Monitor Auction, Printable View, Export to Spreadsheet

- Header: Enter details/Add Attachments (optional)

ORACLE Sourcing

Negotiations > Auction: 2187 > Create Bid: 1033 (Auction 2187)

Title: General Supplies

Supplier: Lyreco
Auction Currency: USD
Bid Currency: USD
Price Precision: Any

Bid Valid Until: []
Reference Number: []
Note to Buyer: []

Attachments

Add Attachment...

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

- Lines: Enter **Bid Prices** and click **Continue**

ORACLE Sourcing

Negotiations > Auction: 2187 > Create Bid: 1033 (Auction 2187)

Title: General Supplies

Auction Currency: USD
Price Precision: Any
Bid Currency: USD

Line	Update	Ship-To	Rank	Start Price	Target Price	Bid Price	Proxy Minimum Unit	Target Quantity	Bid Quantity	Promised Date
1 Line 1 - Goods	[]	Appliance Park	No Bid	100		[]	Each	10	10	[]
2 Line 2 - Goods	[]	Appliance Park	No Bid	100		[]	Each	10	10	[]
3 Line 3 - Services	[]	Appliance Park	No Bid	100		[]	Each	1	1	[]
4 Line 4 - Services	[]	Appliance Park	No Bid	100		[]	Each	1	1	[]

Indicates more information requested. Click the Update icon.

Step 11: Create & Submit Bid/Proposal

- Review and click **Submit**

ORACLE Sourcing

Navigator Favorites Home Logout Preferences Help Diagnostics

Negotiations

Negotiations > Auction: 2187 >

Create Bid 1033: Review and Submit (Auction 2187)

Cancel Back Validate Save Draft Printable View **Submit**

Header

Title: General Supplies
 Supplier: Lyreco
 Auction Currency: USD
 Bid Currency: USD
 Price Precision: Any

Time Left: 2 days 22 hours
 Close Date: 25-Jan-2011 23:41:25
 Bid Valid Until:
 Reference Number:
 Note to Buyer:

Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Lines

Bid Total (USD) 2,019.00

Proxy Bid Decrement

Select Line	Ship-To	Start Price	Target Price	Bid Price (USD)	Proxy Minimum Unit	Target Quantity	Bid Quantity	Line Total	Need-By Date	Promised Date
<input checked="" type="radio"/> 1 Line 1 - Goods	Appliance Park	100		90	Each	10	10	900.00		
<input type="radio"/> 2 Line 2 - Goods	Appliance Park	100		92	Each	10	10	920.00		
<input type="radio"/> 3 Line 3 - Services	Appliance Park	100		99	Each	1	1	99.00		
<input type="radio"/> 4 Line 4 - Services	Appliance Park	100		100	Each	1	1	100.00		

Line 1: Line 1 - Goods

Notes

Note to Buyer

Attachments

- Confirmation screen

ORACLE Sourcing

Navigator Favorites Home Logout Preferences Diagnostics

Negotiations

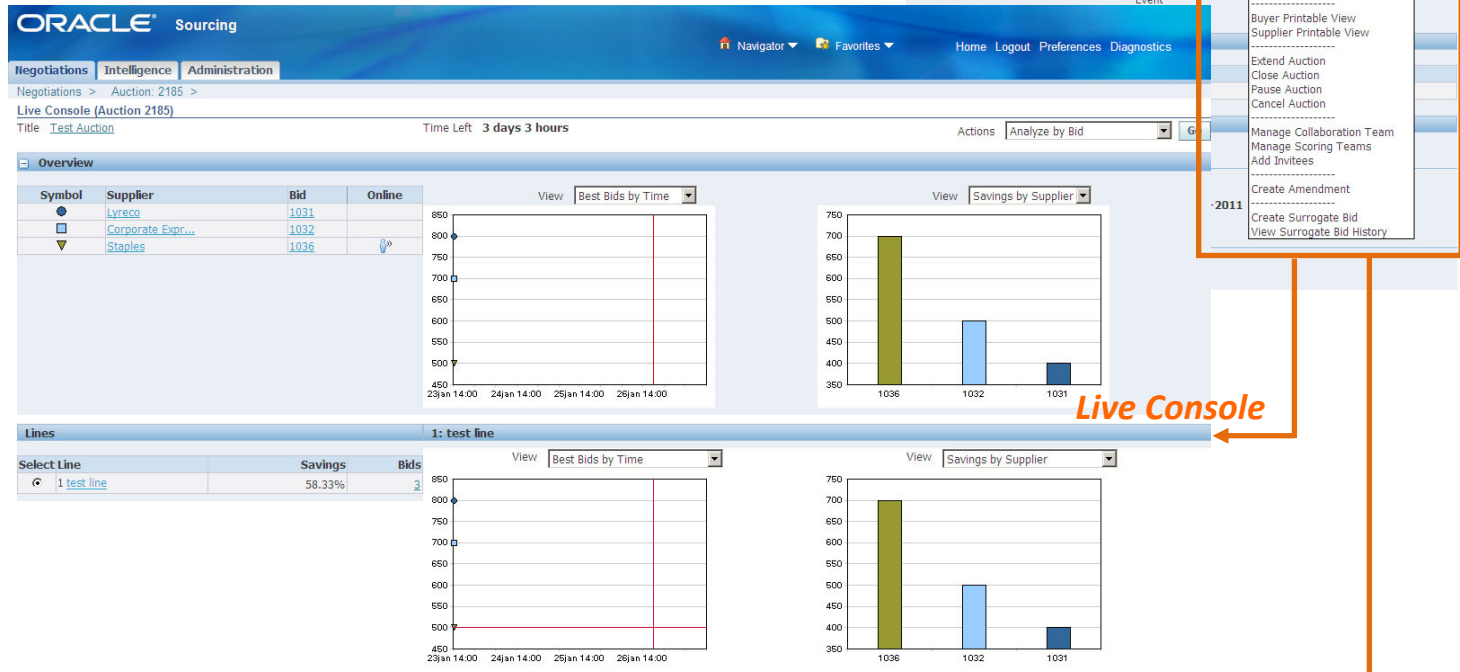
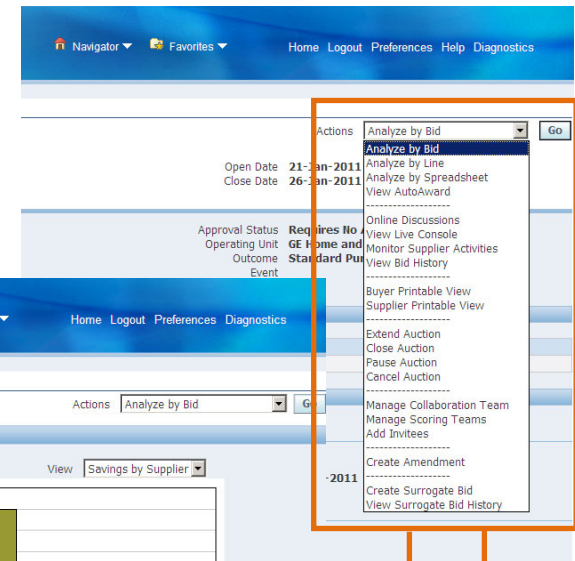
Confirmation
 Bid 1033 for Auction 2187 (General Supplies) has been submitted.

[Return to Sourcing Home Page](#)

Review Supplier Response and Award

Step 12: Open Negotiations – Monitor Supplier Responses

- Click on **Published Negotiation**
- From the **Action** drop down menu, select your option to review, for example select **View Live Console** or **Analyze by Bid** and click Go



Live Console

Analyze by Bid

ORACLE Sourcing

Negotiations > Auction: 2185 > Live Console (Auction 2185) > Analyze by Bid (Auction 2185)

Title: Test Auction
Time Left: 3 days 3 hours
Status: Active
Close Date: 26-Jan-2011 17:57:38

Supplier	Supplier Site	Contact	Bid	Bid Total (Bid Currency)	Bid Total (USD)
Staples		Middleton, Kate	1036	500.00 (USD)	500.00
Corporate Express		O'Shea, Katty	1032	700.00 (USD)	700.00
Lyreco		Powers, Mr. Kenny	1031	800.00 (USD)	800.00

[Return to Live Console \(Auction 2185\)](#)



Step 13: Closed Negotiations – Award Negotiation

- From the **Action** drop down menu, select your option to review and decide award scenario, for example **Analyze by Bid**

The screenshot shows the Oracle Sourcing interface for a negotiation titled 'Test Auction' with a status of 'Closed'. The 'Actions' dropdown menu is open, highlighting the 'Award by Bid' option. Other options include 'Award by Line', 'Award by Spreadsheet', 'View AutoAward', 'Award Summary', 'Complete Award', 'Online Discussions', 'View Live Console', 'Monitor Supplier Activities', 'View Bid History', 'Buyer Printable View', 'Supplier Printable View', 'Manage Collaboration Team', 'Manage Scoring Teams', 'Create New Round', 'Create Surrogate Bid', and 'View Surrogate Bid History'.

- Select applicable suppliers and click **Award Multiple Lines**

The screenshot shows the Oracle Sourcing interface for the 'Award by Bid (Auction 2185)' screen. The 'Award Multiple Lines' button is highlighted with an orange box. Below the button is a table with the following data:

Select Supplier	Supplier Site	Contact	Bid	Bid Total (Bid Currency)	Bid Total (USD)	Award Total (USD)	Shortlist
<input type="checkbox"/> Staples		Middleton, Kate	1036	500.00 (USD)	500.00	0.00	✓
<input type="checkbox"/> Corporate Express		O'Shea, Katy	1032	700.00 (USD)	700.00	0.00	✓
<input type="checkbox"/> Lyrecop		Powers, Mr. Kenny	1031	800.00 (USD)	800.00	0.00	✓

Step 13: Closed Negotiations – Award Negotiation

- Select lines to award to each supplier by selecting the radio button

- Click **Recalculate Award** button to update the award and savings amounts at the bottom of the screen

- When done, select **Save Award** from the Actions drop down and click Go

Label	Staples	Corporate Express	Lyreco
Supplier Site			
Bidder Contact	Middleton, Kate	O'Shea, Katty	Powers, Mr. Kenny
Shortlist	✓	✓	✓
Bid	1036	1032	1031
Bid Valid Until			
Bid Total (Bid Currency)	500.00 (USD)	700.00 (USD)	800.00 (USD)
Bid Total (USD)	500.00	700.00	800.00
1 test line	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Award Total	500.00 (100.00%)	0.00 (0.00%)	0.00 (0.00%)

Current Value (USD) **1,200.00**
 Total Award Amount (USD) **500.00**
 Savings Amount (USD) **700.00**
 Savings Percent **58.33**

- Return to the negotiation header by clicking on the Title link

Label	Staples	Corporate Express	Lyreco
Supplier Site			
Bidder Contact	Middleton, Kate	O'Shea, Katty	Powers, Mr. Kenny

Step 13: Closed Negotiations – Award Negotiation

-Select **Complete Award** from the Actions drop down and click Go

The screenshot shows the Oracle Sourcing interface for Auction: 2185. The 'Actions' dropdown menu is open, and 'Complete Award' is highlighted. Other options include 'Award by Bid', 'Award by Line', 'Award by Spreadsheet', 'View AutoAward', 'Award Summary', 'Online Discussions', 'View Live Console', 'Monitor Supplier Activities', 'View Bid History', 'Buyer Printable View', 'Supplier Printable View', 'Manage Collaboration Team', 'Manage Scoring Teams', 'Create New Round', and 'View Surrogate Bid History'. The 'Go' button is visible next to the dropdown.

- Check “Share award decisions with suppliers immediately” for automated emails to awarded suppliers

-Click **Submit**

The screenshot shows the 'Information' section of the Oracle Sourcing interface. The checkbox 'Share award decisions with suppliers immediately' is checked. The 'Submit' button is highlighted with an orange box. The 'Cancel' button is also visible.

- Confirmation screen

The screenshot shows the confirmation screen in the Oracle Sourcing interface. A message box displays: 'Confirmation Auction 2185 Completed, Purchase Order Not Requested.' The 'Auction: 2185' text is highlighted with an orange box. The 'Analyze by Bid' dropdown and 'Go' button are also visible.

