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# Strategic Sourcing Without Supplier Enablement

Session #26774  
March 24, 2009

ALLIANCE'09

Anaheim, California



# Your Presenters

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- David Best
- Senior Business Analyst
- Seven Years with ERP
- Past Associate Director of Purchasing
- 42 Year Seminole



# Overview

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- When FSU encountered an urgent need to convert legacy bidder records and track bid events the decision was made to use PeopleSoft Strategic Sourcing for that purpose even though the ERP system did not include a supplier portal.



# Response to Need

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## Phase 1 Strategic Sourcing Implementation without Supplier Enablement :

1. *Store Bidder records and categorizations in OMNI (FSU PeopleSoft System)*
2. *Enable Purchasing Dept staff to add and update bidder records online, and*
3. *Create numbered competitive solicitation events within PeopleSoft Financial/SCM.*



# Florida State University

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**.....a public university with an emphasis on research, education and public service.**

- **Located in Tallahassee, the capital city of Florida**
- **Over 39,000 students**
- **Over 14,000 employees**
- **Annual Operating Budget: \$1.1B**



# FSU and Oracle

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- Big Bang go live with PeopleSoft Financials version 8.4 on July 1, 2004 and HR on December 17, 2004.
- Currently on FIN version 8.9, MP5.
- Upgrade to FIN version 9.0, MP5 and conversion from DB2 to Oracle Database Go Live on April 6, 2009.



# History of Bidder Management

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- Three Ring Binders
- dBase
- Outsource to App Service Provider
- Oracle Strategic Sourcing



# Project Timeline

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- Project Assessment
  - *First Look*                      *Sept 1, 2007*
  - *Formal Approval*              *Nov 15, 2007*
  
- Configuration through Stabilization
  - *Setup*                              *Nov 16, 2007*
  - *Go-Live*                          *Feb 21, 2008*
  - *Stabilization Ends*            *March 25, 2008*





# In Scope, Phase 1

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*Load Legacy Bidder Records*

*Employee Online Bidder  
Registration and Management*

*Create Bid Events*



# Out of Scope

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- Bidder Self Registration via Supplier Portal
- Bidder Self Service Maintenance
- Event Posting
- Open Period Event Management
- IM via MultiChannel Framework
- Receipt of Bids
- Awards



# Preliminaries

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- PeopleBooks
- Explore with Delivered Roles
- Fit Gap Analysis
- Estimate Resource Requirements
- Project Plan
- Document from the Outset



# Setup Manager

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- Create Sourcing Project
- Track Completion of Sourcing Tasks
- Security Issues
  - *Delivered Role:*
    - PTLT\_IMPLEMENTER
    - PTLT\_PROJECT\_MGR
  - *Access to Task List Pages and Components*



# Select Options & Create Project

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  - ▶ Process Scheduler
  - ▶ Application Engine
  - ▶ Integration Broker
- ▼ Setup Manager
  - Manage Implementation Projects
  - Tax Center
  - My Personalizations
  - My System Profile
  - My Dictionary

**Select the features you want.**

[New Window](#) | [Help](#) | [Customize Page](#) | [http](#)

Product Summary Business Process Summary

Customize Find View All First 1-10 of 20 Last

Product Suite Name	Product Name	Selected Features	Feature Name	Delete
<a href="#">Supply Chain Management</a>	<a href="#">Strategic Sourcing</a>	10 of 22	ChartField Configuration	★
			Strategic Sourcing General	★
			Vendor Setup	★
			Bidder Groupings	[-]
			Bidder Registration	[-]
			Bidder Self-Categorization	[-]
			Sourcing Bid Factors	[-]
			Sourcing Constraints	[-]
			Standard Comments	[-]
			Vendor Users	[-]

Implementation Project SOURCING1 Strategic Sourcing Phase 1

Add/Remove Features [By Product](#) [By Business Process](#)

Setup Task List	Last Update Date/Time	Last Generated Date/Time	Delete Template
✓ <a href="#">View Setup Task List</a>	02/22/08 3:57:12PM	02/22/08 10:23:59AM	🗑

**Navigation: in PeopleTools**



# Setup Summary

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Project SOURCING1 Strategic Sourcing Phase 1

View All

Setup Tasks Summary Tracking Task Details

Customize Find View All First 61-76 of 76 Last

Seq	Status	Setup Task	Description	Navigation	Products Affected	Features Affected
61.001	?	<a href="#">Bid Factor Setup</a>	Set up and define bid factors for use in sourcing events.	Sourcing > Create Events > Bid Factor Setup	AUC, SSP	<a href="#">Sourcing Bid Factors</a> , <a href="#">Sourcing Bid Factors</a>
62.001	?	<a href="#">Bid Factor Group Setup</a>	Combine bid factors into groups.	Sourcing > Create Events > Bid Factor Group Setup	AUC, SSP	<a href="#">Sourcing Bid Factors</a> , <a href="#">Sourcing Bid Factors</a>
63.001	?	<a href="#">Constraints Setup</a>	Setup Event Constraints	Sourcing > Create Events > Constraints Setup	AUC	<a href="#">Sourcing Constraints</a>
64.001	?	<a href="#">Bidder Group Setup</a>	Setup and maintain Sourcing bidder groups.	Sourcing > Create Events > Bidder Group Setup	AUC	<a href="#">Bidder Groupings</a>
65.001	?	<a href="#">Standard Comments Type</a>	Set up and modify an available standard comments type.	Sourcing > Create Events > Standard Comments Type	AUC	<a href="#">Standard Comments</a>
66.001	?	<a href="#">Standard Comments</a>	Create and edit standard comments.	Sourcing > Create Events > Standard Comments	AUC	<a href="#">Standard Comments</a>
67.001	?	<a href="#">Document Association Rules</a>	Define rules to associate receivers with vouchers.	Set Up Financials/Supply Chain > Product Related > Procurement Options > Vouchers > Document Association Rules	AP, AUC, EPO, MPA, PO	<a href="#">Matching</a> , <a href="#">Vendor Setup</a> , <a href="#">Purchase Orders</a>

Link to task site in new window

Manage Setup Tasks

PeopleBooks help link



# Online Project Tracking

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**Track tasks online.**

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**Manage Setup Tasks**

Project SOURCING1 Strategic Sourcing Phase 1

View All

**Setup Tasks** Customize | Find | View All | First 61-76 of 76 Last

Seq	Status	Setup Task	Assigned To	Start Date	End Date	Discussion	Percent Complete
61.001	✓	<a href="#">Bid Factor Setup</a>	David Best	02/22/2008	02/22/2008	Discussion	100
62.001	✓	<a href="#">Bid Factor Group Setup</a>	David Best	02/22/2008	02/22/2008	Discussion	100
63.001	✓	<a href="#">Constraints Setup</a>	David Best	02/22/2008	02/22/2008	Discussion	100
64.001	✓	<a href="#">Bidder Group Setup</a>	David Best	02/22/2008	02/22/2008	Discussion	100
65.001	✓	<a href="#">Standard Comments Type</a>	David Best	02/22/2008	02/22/2008	Discussion	100
66.001	✓	<a href="#">Standard Comments</a>	David Best	02/22/2008	02/22/2008	Discussion	100
67.001	✓	<a href="#">Document Association Rules</a>	DLB	02/22/2008	02/22/2008	Discussion	100
68.001	✓	<a href="#">Purchasing Definition</a>	David Best	02/22/2008	02/22/2008	Discussion	100
69.001	✓	<a href="#">Ship To Locations</a>	DLB	02/22/2008	02/22/2008	Discussion	100
70.001	✓	<a href="#">Match Rule Type</a>	DLB	02/22/2008	02/22/2008	Discussion	100
71.001	✓	<a href="#">Match Rules</a>	DLB	02/22/2008	02/22/2008	Discussion	100

**Download documentation to Excel Spreadsheet**

**Keep notes in the Discussion comments feature**



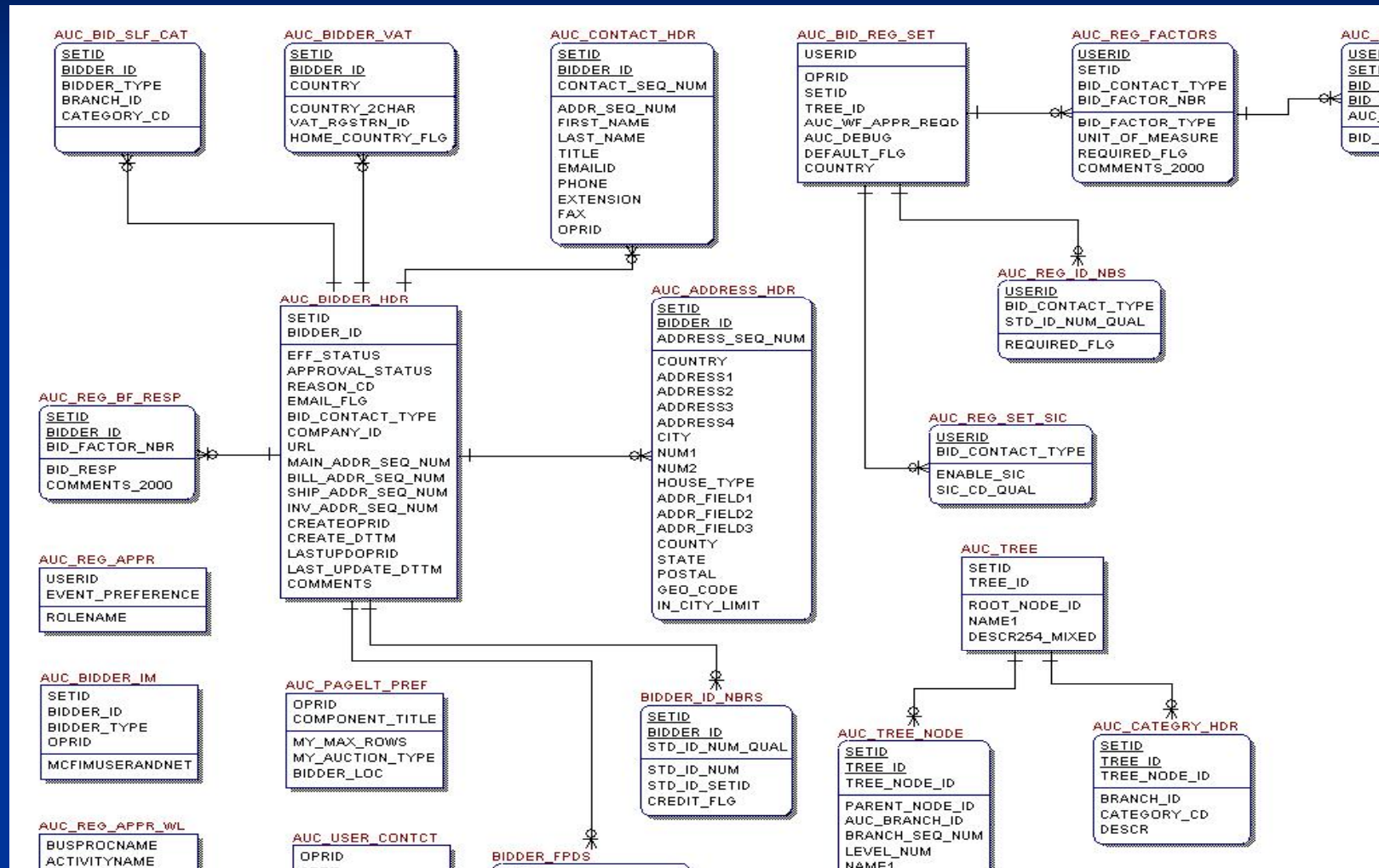
# Download to Spreadsheet

G67					
	A	B	C	D	E
1	TASK	TASK_NAME	ASSIGNED	PCT_COMPLETE	PTLT_DISCUSSION
64	56.001	Notification Templates	David Best	100	Will be needed for Phase 2. Add to Config guide.
65	57.001	Create SelfCategorization Tree	David Best	100	Used temporary All Items tree until the fix for adding a tree in Self Categorization Tree is migrated.
66	58.001	Bidder Registration Setup	David Best	100	Add to Config Guide. Use user_id FSU_BIDDER. Set up all Purchasing Dept staff who will access sourcing.
67	59.001	Define Terms and Conditions	David Best	100	Use TBD for Phase 1
68	60.001	Administer File Attachments	David Best	100	Not needed until Phase 2.
69	61.001	Bid Factor Setup	David Best	100	Set up sample numeric type bid factor for testing. Revise when details are provided by buyers and more fully understood.
70	62.001	Bid Factor Group Setup	David Best	100	No using this until bid factor setup is more fully understood and used by buyers.
71	63.001	Constraints Setup	David Best	100	Not setting up any constraints in Phase 1.
72	64.001	Bidder Group Setup	David Best	100	Available but could not finish a bidder group setup because of an error message saying that I did not have the correct user preferences. Note: Defining User Preferences is not done until task # 76, which is the last task.
73	65.001	Standard Comments Type	David Best	100	Set up Type NAS: Not As Specified
74	66.001	Standard Comments	David Best	100	
75	67.001	Document Association Rules	DLB	100	
76	68.001	Purchasing Definition	David Best	100	Set up FSU01 as the SS Unit
77	69.001	Ship To Locations	DLB	100	





# ERDs



# Configuration

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**Bid Factor Group Setup**  
Assign bid factors and establish rules for bid factor groups.

**Reason Code Setup**  
Setup bidder registration denial, bid rejection, disallow bid, auction pause and auction resume reason codes.

**Standard Comments**  
Create and edit your standard comments.

**Standard Comments Type**  
Setup and modify the available standard comments type.

**Update Bidder Profile**  
Update an existing bidders profile.

**Vendor User Setup**  
Add the Event Vendor role to vendor users who wish to participate in Strategic Sourcing events.

**Forum Administration**  
Manage forum messages and permissions.

**System Administration**

**Strategic Sourcing Installation Options**  
Installation options including award details display options and multichannel framework setup.

**Define User Preferences**  
Update a user's general and product preferences.

**Business Unit Creation**  
Create business units for Strategic Sourcing.

**Setup Approval Process**  
Define custom rules and criteria for triggering an approval process.

**Assign Approval by Business Unit**  
Specify whether or not approval is required for a Strategic Sourcing Business Unit.

**Define Terms & Conditions**  
Define the default terms & conditions for your events.

**Bidder Registration Setup**  
Setup before bidder registration can start.

**URL Setup**



# Configuration

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- BU Setup
- Define User Preferences
- Bidder Registration Setup



# BU Definition

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**Business Unit Definition** **Default Dates**

Unit: FSU01 Florida State University  
Short Description: FSU01

**Business Unit Definition**

Location Code: SUCA1400 Dispatch Method: Email  
Billing Location: SPCC0111A Currency Code: USD  
AM Business Unit: FSU01 Rate Type: CRRNT  
Bill Source: MISC

Allow MultiCurrency Events  Log History of Event Changes  
 Require New Version for Edits  Permit Award to Previous Round

External PO Integration: No External Integration

**Default Options for All Events**

Allow Bidder XML Downloads Round/Version Display: Display Round and Vers  
Factor Event Score Into:  Total Score  Line Score Event Header Weighting:  
Bid Quantity Rule: Bid Up to Maximum Quantity  Bid Required On All Lines  
Start Price Rule: Do Not Display

**Rfx Event Default Options**

Multiple Bids Allowed  Sealed Event



# Define SS User Preferences

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- ▷ Sales and Use Tax
- ▷ Search Indexes
- ▷ Shipping and Receiving
- ▷ Units of Measure
- ▽ User Preferences
  - AP User Preferences Report
  - Define User Preferences
  - **User Preferences Report**
  - VAT and Intrastat
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**User Preferences** Strategic Sourcing

User ID: DBEST BEST, DAVID  
 Department: 027000 Purchasing Services

**Permissions and Defaults**

Format:	Buy	Sell	RFI	Type:	Auction	RFx
Create:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Default:	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		<input type="radio"/>	<input checked="" type="radio"/>

**Event Authorizations**

Approve Events  
 Cancel Events  
 Award Events  
 Award more than requested qty

**Copy-From Transactions**

Requisition  Manufacturing BOM  
 Purchase Order  Engineering BOM  
 Contract  Planning Order

**Sourcing Constraint Permission**

Allow user to override Mandatory constraints for the following types:

Event  Business Unit  Global

**Sourcing Template Permissions**

Template Type	Add	Update	Delete
Business Unit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Department	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Auctions and Reverse Auctions**

**Copy Req to Bid**

**Generally avoid deletes**



# Bidder Registration Setup

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**Bidder Registration Setup Homepage** ← **Fictitious User**

Registration Settings For: FSU\_BIDDER

**General Settings**

Default Flag SetID: SHARE

\*Country: USA United States

**Setup Default Bidder Profile**

Select a UserId from the prompt below. This user's settings will be used as the default values to create a new registered Strategic Sourcing bidder.

User ID: FSU\_BIDDER

**Select Bidder Categorization Tree**

Select the default categorization tree used by bidders to register for selected item and asset categories.

Tree ID: 0802221149380 Bidder Self Categorization Tree

**Select Approval Settings**

Workflow Approval Required

**Administer Bidder Classification Information**

**SIC Codes**

Enable Bidders to enter SIC Codes

SIC Code Type: [Dropdown]

**Update when new Self Categorization Tree is Created**

**Profile Questions**



# Build Categorization Tree

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- Tree Manager
  - *New Security Roles*
  - *Self Categorization Tree*
- UNSPSC Structure
  - *Hierarchical Taxonomy for Roll Ups*
  - *1,350 Item Category Codes for eProcurement*
  - *407 Bidder Self Categorization Codes*
    - Buyers Finalize Category Codes



# SelfCategorization Tree

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**Tree Legend**

- Edit Node
- Add Sibling Node
- Paste Node
- Add PeopleSoft Tree
- Add Child Node
- Cut Node
- Delete Node

**Bidder Self Categorization Tree**

- Sourcing - Sourcing Categories
  - Sell - Sell Categories
  - Buy - Buy Categories
  - 10100000 - Live animals
  - 10120000 - Animal feed
  - 10130000 - Animal containment
  - 10150000 - Seeds/Bulbs/Cuttings
  - 10160000 - Floriculture/silviculture pro
  - 10170000 - Fertilizers/Plant Nutrients
  - 10190000 - Pest Control Products
  - 11110000 - Earth and Stone
  - 11120000 - Forestry Products
    - 11121700 - Peat/Bark/Mulch
    - 11121600 - Wood Plywood/Hardwood
  - 11150000 - Fibers/threads/yarns
  - 11160000 - Fabrics/leather
  - 12000000 - Chem/Bio Chem/Gas
    - 12140000 - Elements and Gases
    - 12142200 - Isotopes
    - 12142100 - Industrial use gases
    - 12352200 - Chemical/BioChem
    - 12161500 - Indicators/Reagents

**Options for buying and selling**

**UNSPSC values form Item Categories; Mostly at segment, family and class levels**





# Goal # 1

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Store Bidder records and self-categorization codes



# Import Legacy Bidders

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- Obtain Master File from Hosted Application
  - *Ownership*
  - *17,905 Bidder Records for IK*
- Cleanse and Organize Bidder Data
  - *Remove Duplicate Bidders*
    - No Unique Identifier
  - *Determine Requirements for Valid Bidders*



# Minimum Requirements

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- *Original IK Bidder File* 17,905
- *All with an Email Address* 5,941
- *Email and Address* 5,862
- *Email, Address & Phone* 5,797
- *Email, Address, Phone, Contact* 4,395
- *Email, Complete Address, Phone, Contact*

3,921



# Take Out the Garbage

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- Invalid Email Addresses
  - *Format*
  - *Domain*
- Invalid Phone or Fax Number
- Invalid Government Classification
- No Commodity Classification



# Identify Required Fields

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**Bidder Registration**

**Step 2 of 8: User Account Setup**

Begin creating your user account here. Note that you may register other users for your company in addition to yourself. To create additional accounts for other users, click "Save and Add Another User" to expand the form. You may also provide instant messaging account information (for real-time communication with others using the system), as well as preferred time zone and currency.

**\* Required Field**

\*Company Name

URL: http://

**User Information**

\*First Name  [Delete](#)

\*Last Name

Title

\*Email ID

\*Telephone  Ext

Fax

**Other Contact Info (Optional)**

Instant Messaging (IM) Information

IM Service

IM User Name

**Asterisk designates required field**

**First and Last Name Required by PeopleSoft but not FSU**



# Identify Required Fields

	A	B	C	D	E	F
48	<b>Field</b>	<b>Required</b>	<b>Default Setting</b>	<b>Load From IK Sheet/Column</b>	<b>IK Column Description</b>	<b>Comments</b>
49	Company	Y	N/A	Data/F	Company Name	IK has no naming conventions
50	URL	N	N/A	Data/F	Url	
51	First Name	Y	N/A	Data/H	Full Name	Column H has First, Last, and Prefix in one field. How should this be split? Also, many bidders have "Primary Contact" as the contact name.
52	Last Name	Y	N/A	Data/H	Full Name	Ditto M75
53	Title	N	N/A	Data/I	Title	Mostly blank in IK data
54	Email ID	Y	N/A	Data/T	Email	Need cleanup on syntax
55	Telephone	Y	N/A	Data/P	Phone 1	IK data inconsistently formatted. Some have extension in same field as area code, exchange, number. Home or Work. Some have 2 periods in format others have only one period.
56	Ext	N	N/A	Data/P	Phone 1	Ditto M79
57	Fax	N	N/A	Data/R		IK data inconsistently formatted. Some have extension in same field as area code, exchange, number.
58	User ID	Y	TBD			TBD: need convention for creating bidder User ID
59						
60	Currency Code	N	USD			
61						



# Look Ahead

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Question: Should bidder records be added to PSOPRDEFN and PSOPRALIAS?



# PSOPRDEFN & PSOPRALIAS

OPRID	VERSION	OPRDEFNDESC	EMPLID	EMAILID	OPERPSWD	ENCRYPTED
BID0000105		1 BRIAN SHEA		RFP@INDUSTRIALSOLUTIONSGROUP.NET	5JSOsHwIGbMYNBESb/dfGCvFgMw=	1
BID0000106		1 ROBERT BRAGAGLIA		sales@xicomputer.com	kLEJw3dmcvN3a2zms1UC0E9Yme4=	1
BID0000107		1 PRIMARY CONTACT		INFO@1-888-MAGNETS.COM	kLEJw3dmcvN3a2zms1UC0E9Yme4=	1
BID0000108		1 PRIMARY CONTACT		INFO@101PHONES.COM	kLEJw3dmcvN3a2zms1UC0E9Yme4=	1
BID0000109		1 STEPHEN DETTON		SALES@10-S.COM	kLEJw3dmcvN3a2zms1UC0E9Yme4=	1

OPRID	OPRALIASVALUE	EMPLID	CUST_ID	VENDOR_ID	BIDDER_ID
BID0000445	0000000445				0000000445
BID0000446	0000000446				0000000446
BID0000447	0000000447				0000000447
BID0000448	0000000448				0000000448
BID0000449	0000000449				0000000449





# Map Data to Bidder Tables

---

- Source Data Files
  - ^ *Delimited Spreadsheet*
  - *Bidder UNSPSC in DAT file*
- Target Sourcing Tables
  - *AUC\_BIDDER\_HDR*
  - *AUC\_ADDRESS\_HDR*
  - *AUC\_USER\_CONTACT*
  - *AUC\_BID\_SLF\_CAT*
  - *FSU\_AUC\_GOV\_CER*



# Specification Document

## *Conversion Flow, Systems*

- *Source(s)*: IK bidder records in Excel spreadsheet.
- *Target(s)*: AUC\_BIDDER\_HDR, AUC\_ADDRESS\_HDR, BIDDER\_ID\_NBR, AUC\_USER\_CONTACT, AUC\_BID\_SLF\_CAT, AUC\_CONTACT\_HDR

## *Assumptions*

- IK bidder records can be loaded into OMNI AUC bidder files using CI or App Engine processes.
- The processes can perform formatting and editing as described below.

## *Dependencies*

- Clean up and preparation of the IK bidder by the Purchasing Dept prior to loads.

## *Source Data Extraction*

### **Selection Criteria**

- ◆ Excel spreadsheet (See FSU\_BID\_IKEY\_20071206)

### **Formatting Rules**

- In Step 1, All IK bidders will be loaded as Bidder Type "Business" (default)
- In Step 1, All IK bidders will be loaded as "Selling goods/Services" (default)
- In Step 2, Company names longer than 40 characters will be truncated.
- In Step 2, the distinction in the IK data for "Work" or "Mobile" phone numbers will be disregarded. Also, we will not attempt to extract extensions from the single Phone1 field for the IK data. Instead, the load will use only the area code, exchange, and number, (numbers) as separated in the cell by periods.



# Build Process and Load Data

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- Asset Management

**Process Scheduler Request**

User ID: DBEST Run Control ID: Bidder\_Load

Server Name: PSUNX Run Date: 03/12/2009  
Recurrence: Run Time: 8:30:14PM [Reset to Current Date/Time](#)  
Time Zone:

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	<u>FSU_AUC_BID</u>	FSU_AUC_BID	<u>Application Engine</u>	Web	TXT	<a href="#">Distribution</a>

OK Cancel



# Build Process and Load Data

---

- Application Engine Process
  - *Defaults*
  - *Order of Precedence*
  - *Edits*
  - *Truncations*
  - *Convert*
  - *Generate*



# Build Process and Load Data

---

- Test and Validate
  - *Control Report and Error Handling Log*
  - *Start Small*
  - *Iterative Process*

1,791 Valid Vendors Loaded



## Goal # 2

---

# Employee Bidder Management

- Modify Bidder Registration
- Modify Maintain Bidder



# Modifications to Bidder Registration

---

- Provide staff access to online Bidder Registration via the employee portal
- Auto-generate sequentially numbered and formatted user ids
- Auto-assign a user password
- Block email notification approval message



# Modifications to Bidder Registration

---

- Create Page Modifications
  - *Hide and Grey-out fields*
  - *Change selected fields to required status*
  - *Set Defaults to aid data entry*
- Change Additional Classification Numbers
  - *Remove Standard ID, SIC, and VAT information*
  - *Add FSU\_AUC\_GOV\_CER box*





# Modifications to Bidder Registration

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- ▶ Enterprise Components
- ▶ Worklist
- ▶ Tree Manager
- ▶ Reporting Tools
- ▶ PeopleTools
- OMNI Portal Home
- Tax Center
- My Personalizations

**Bidder Registration**

**Step 6 of 8: Additional Classification Information**

Please fill out the following information. This information allows us to more accurately tailor the Sourcing process with your business.

\* Required Field

**More About Your Organization (Optional)**

Certification Source  🔍

Government Classification  🔍

<< Back    Next >>    Cancel Registration

\* Required Field

**Hide Standard Id, SIC, and VAT Info Boxes**

**Add Government Certification Box**

**These are required fields. Testers noticed the missing astericks.**



# Modifications to Bidder Registration

## New custom table: FSU\_AUC\_GOV\_CER

SETID	BIDDER_ID	EFFSEQ	EFFDT	GOV_CLASS	CERTIF_SOURCE
SHARE	0000000179	1	2008-02-25	C	NONE
SHARE	0000000180	1	2008-02-25	R	NONE
SHARE	0000000181	1	2008-02-25	M	OSD
SHARE	0000000182	1	2008-02-25	A	NONE
SHARE	0000000183	1	2008-02-25	A	NONE
SHARE	0000000184	1	2008-02-25	C	NONE
SHARE	0000000185	1	2008-02-25	A	NONE
SHARE	0000000186	1	2008-02-25	A	NONE
SHARE	0000000187	1	2008-02-25	O	NONE
SHARE	0000000188	1	2008-02-25	A	NONE
SHARE	0000000189	1	2008-02-25	A	NONE
SHARE	0000000190	1	2008-02-25	C	NONE
SHARE	0000000191	1	2008-02-25	A	NONE



# Maintain Bidder

---

- Set up Staff as Bidder Registration Users
- Modifications to Component
- Customization for Category Maintenance



# Modified Bidder ID Page

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- SCM Integrations
- Set Up Financials/Supply Chain

**Maintain Bidders in Event Response Component**

SetID SHARE Bidder ID 0000000154

Company ADVANCE BUSINESS SYSTEMS

Profile Questions	Question	Response
1		

**Government Classification** Find | View All First 1 of 1 Last

Certification Source NONE Date 02/25/2008

Government Classification B Small Business, Florida, Non-Minority Owned

Save Return to Search

[FSU Guidelines for MBE Codes](#)



# Modified Bidder ID Page

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- Set Up Financials/Supply Chain
- Enterprise Components
- Worklist
- Tree Manager

New Window | Help | Customize Page | help

Main Addresses Contacts Identifications **Fsu Auc Category**

SetID SHARE Bidder ID 0000000154

Company ADVANCE BUSINESS SYSTEMS

**FSU Custom Page**

Customize | Find | View 4 | First 1-12 of 12 Last

Category	Description
1 14111507	Paper-Printer or copier
2 43211501	Computer servers
3 43211600	Computer Peripherals
4 43230000	Software
5 44000000	Office equip/ acces/ supp
6 44101501	Copiers
7 44101502	Fax machines
8 44101700	Printer/Copier/Fax acces
9 44103103	Toners/drums/lnk Cart.
10 44120000	Office supplies
11 78101804	Relocation services
12 80160000	Business administration servic



# Goal # 3

---

*Create Bid Events*



# Create Bid Events

---

- Event Naming and Definition
- Configure Line Items
- Select Bidders to Invite
  - *Search for Bidders*
  - *Recommend Bidders*
  - *Save as Bidder Group*
- Modifications and Customizations



# Create Events

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- ▷ SCM Integrations
- ▷ Set Up Financials/Supply

**Create Events**  
 Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value  Add a New Value

Business Unit: =

Event ID: begins with

Event Round: =

Event Version: =

Event Format: =

Event Type: =

Event Name: begins with

Event Status: =

Case Sensitive

[Basic Search](#)

**Search Results**  
[View All](#) First 1-100 of 128 Last

Business Unit	Event ID	Event Round	Event Version	Event Format	Event Type	Event Name	Event Status
FSU01	0000000138.1	1	1	Buy	RFx	J 576-0 PC AV EQUIPMENT AND INSTALL	Open
FSU01	0000000137.1	1	1	Buy	RFx	J 5275-0 CHARTER BUS SVCS FOR INTERNATIONAL CTR	Open
FSU01	0000000136.1	1	1	Buy	RFx	J 5274-0 CHARTER BUS SERVICES FOR FSU BASEBALL	Open
FSU01	0000000135.1	1	1	Buy	RFx	ITB 5309-8 TRAINING FOR ACADEMIC WORKSHOPS	Open
FSU01	0000000134.1	1	1	Buy	RFx	RFP 5308-3 X-RAY SCATTERING SYSTEM	Open
FSU01	0000000133.1	1	1	Buy	RFx	ITN 5306-5 PRINTING FCRR READING MATERIALS	Open

**ITB  
RFB  
ITN  
Quotes**





# Create Events

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**SQAFl**

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**Modify an Event**

**Event Summary**

Business Unit: FSU01 Event ID: 0000000134 Round: 1 Version: 1 Event Format: Buy

Event Type: RFx [Change to Auction](#)

Event Status: Open

Preview Date: 01/23/2009 1:43PM EST

\*Event Name: RFP 5308-3 X-RAY SCATTERING SYSTEM \*Start Date: 01/23/2009 1:43PM EST

Description: The Florida State University is inviting proposals from qualified firms for a X-Ray scattering system with simultaneous small angle (SAXS) and wide angle

Copy From: [Delimited File](#) [Item Master](#) [Purchase Order](#) [Request For Information](#) [Requisition](#) [Sourcing Event](#) [Sourcing Template](#)

Required fields reside on pages marked with an asterisk (\*) -- you may not save your event

**Step 1: Define Event Basics**  
Enter basic information, general settings and optional rules for this event.

[\\* Event Settings and Options](#) [Payment Terms and Contact Info](#)  
[Event Comments and Attachments](#) [Event Constraints](#)  
[Event Header Bid Factors](#)

**Step 2: Configure Line Items**  
Create line listings for this event.

[\\* Line Items](#) [Item Line Defaults](#)

**Step 3: Select Bidders to Invite**  
Send out targeted invitations to this event, designate it as a public event, or both.

**Period**

**1 line required**



# Create Events

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**Bidder, Vendor, Customer**

**Bidder Search**

**Search Criteria**

Bidder Type: Bidder  
Company: [ ] State: [ ]  
ID: [ ] City: [ ] SIC Type: [ ]  
Contact: [ ] Country: [ ] SIC Code: [ ]  
Group ID: [ ] Postal: [ ]  
Group Name: [ ]  
Category: 41100000  
Recommend Bidders  Invite to Entire Event  
Maximum Rows retrieved: 50 Search

**Search Results**

Bidder ID	Bidder Type	Location	Name	Bidder Company	Government Classification
1 0000000166	Bidder	1	GAIL MARSHALL	AE TECHRON	C
2 0000000188	Bidder	1	GREG KNITZ	ALIGNMENT SUPPLIES	C
3 0000000204	Bidder	1	PRIMARY CONTACT	AMBION TEXAS	R
4 0000000223	Bidder	1	PRIMARY CONTACT	AMERICAN 3B SCIENTIFIC	C
5 0000000243	Bidder	1	DINO MADRIO	APS WATER SERVICES	A
6 0000000344	Bidder	1	PRIMARY CONTACT	BIOVISION	P
7 0000000262	Bidder	1	PRIMARY CONTACT	ASTRO MED	M

**Customization to add Gov Class**



# Create Events

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  - ▶ Asset Management
  - ▶ Banking
  - ▶ Financial Gateway
  - ▶ VAT and Intrastat

## Modify an Event

### Invite Bidders

Business Unit: FSU01 Event ID: 0000000134 Round: 1 Version: 1 Event Format: Buy Event Type: RFx

Public Event

[Customize](#) | [Find](#) | [View All](#) | First 1-5 of 14 Last

Select	Bidder ID	Bidder Type	Name	*Dispatch Method
1 <input type="checkbox"/>	0000002361	Bidder	RIGAKU AMERICA INC	Email
2 <input type="checkbox"/>	0000002362	Bidder	BRUKER-AXS INC	Email
3 <input type="checkbox"/>	0000002363	Bidder	GE SENSING	Email
4 <input type="checkbox"/>	0000002364	Bidder	SHIMADZU	Email
5 <input type="checkbox"/>	0000002365	Bidder	VARIAN	Email

[Search for Bidders](#) [Dispatch Lines](#) [Save Bidders as Group](#)

[Return to Event Overview](#)

GoTo:

details



# Create Events

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  - ▷ Enterprise Components
  - ▷ Worklist
  - ▷ Tree Manager
  - ▷ Reporting Tools
  - ▷ PeopleTools
  - OMNI Portal Home
  - Tax Center
  - My Personalizations

**Bidder Search**

**Search Criteria**

Bidder Type: Vendor

Name: [ ] State: [ ] Type: [ ]

ID: [ ] City: [ ] SIC Type: [ ]

Contact: [ ] SIC Code: [ ]

Group ID: [ ] Item ID: [ ]

Group Name: [ ]

Category: 11110000

Recommend Bidders

Maximum Rows retrieved: 50 Search

No rows found. Please modify search criteria and try again.

OK Cancel Refresh

**When Bidder Type is Vendor**

**And a Category is selected**

**Customize PeopleCode so that Recommend Bidder will return results from the Vendor file**



# Create Events

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- ▷ SCM Integrations

**Step 2: Configure Line Items**  
Create line listings for this event.  
[\\* Line Items](#) [Item Line Defaults](#)

**Step 3: Select Bidders to Invite**  
Send out targeted invitations to this event, designate it as a public event, or both.  
[\\* Bidder Invitations](#)

**Step 4: Invite Collaborators**  
Invite others to collaborate on this event. You may not post your event while collaborators are reviewing it.  
[Event Collaborators](#)

**Step 5: Post Event**  
When all event creation activities are complete, click Post Event to release your event for scheduled external viewing and trigger any bidder invitations you may have defined.

[Save Event](#) [Post](#) [Save As Template](#) [Preview PDF](#)

**Related Links:**  
[Document Status Inquiry](#) [Plan Task Associations](#)

 **Disabled Post**

 Last Updated By: WARD, MARY 01/23/2009 03:12 PM PDT

[Return to Search](#) [Refresh](#) [Add](#) [Update/Display](#)



# Custom Security Roles

---

- FSU\_SOURCING\_SUPERUSER
  - *For ERP*
  
- FSU\_SOURCING\_MANAGER
  - *For Purchasing Department*



# Home Team Technical Tasks

---

- Maintain a Stand-Alone Online Bidder Registration Web Site
  - *Mirrors Sourcing Registration Requirements*
- Merge Bidder List Into Solicitation Notification Process
- Advertise and Administer Bid Events



# Test, Train, Go Live, Stabilize

---

- Merge testing and training for small group of users.
- Go Live for Central Office only
- Be wary of short stabilization period





# Questions?

---



# Contacts

---

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