Oracle® Exchange

Company Administration Guide

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Oracle Exchange Company Administration Guide, Release 6.2

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Contents

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Oracle Exchange Company Administration Guide, Release 6.2

Part No. B12137-01

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Preface

This guide describes the setup and maintenance tasks an Oracle Exchange Company Administrator performs using the Company Administration application.

Intended Audience

This guide is written for users who function as the Company Administrator for their company.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at `http://www.oracle.com/accessibility/`.

Structure

This manual describes the following:

Chapter 1, "Overview"

This chapter is an overview of the Company Administrator's tasks and information on Multi-Lingual and Multi-Currency support.

Chapter 2, "Upgrade Setup Steps"

This chapter identifies the new setup steps for a Company Administrator introduced since the last release of this guide (for release 6.2.2).

Chapter 3, "Oracle Exchange Setup Overview"

This chapter lists the set up steps for a Company Administrator.

Chapter 4, "Oracle Exchange Setup Steps"

This chapter contains the details of the setup steps listed in the previous two chapters. Consult this chapter for details on each of the steps you are directed to perform in Chapter 2 or 3.

Chapter 5, "Ongoing Maintenance"

This chapter provides a checklist of some of the typical maintenance tasks a Company Administrator performs.

Appendix A, "Registration"

This appendix provides information about the registration process.

Appendix B, "Transaction Delivery Communication Methods"

This appendix provides information about the different communication methods you can choose to use when sending and receiving XML documents.

Appendix C, "Billing"

This appendix provides information about fees and billing for Company Administrators.

Appendix D, "Job Functions and System Tasks"

This appendix provides descriptions of the job functions and system tasks initially provided by the system.

Related Documents

Other documentation includes the following:

- Oracle Exchange online Help (accessed by the Help button)—for instructions on all other, non-administrator tasks.

  The Oracle Exchange online Help also includes instructions on setting up other Exchange applications such as Supply Chain Exchange.
- *Oracle Exchange Installation Guide*—for instructions on installing the Exchange.
- *Oracle Exchange System Operator Implementation Guide*—for instructions on implementing Oracle Exchange.
- About Oracle Exchange Release 6.2.4 - for information on new features in Oracle Exchange release 6.2.4.

Conventions

The following terms are used commonly in this setup guide:

System Operator

The System Operator is in charge of the initial setup and day-to-day operation of the site, such as approving companies that register with the system.

Company Administrator

The Company Administrator is responsible for setting up the applications used by the company, approving users, and performing ongoing administrative tasks as needed.

Independent Entity

A company that registers as an independent entity will not be associated as a subsidiary, division, or branch of any other company and must be approved by the System Operator.

Affiliate

Companies such as subsidiaries, divisions, or branches can register as affiliates of parent companies. The parent company must approve the registration of the affiliate.

User

Individuals within a company can register specifically as users of the company. The Company Administrator approves the user's registration.

Trading Partner

Any company with which your company transacts business. Trading Partners generally fall into two types, Buying or Selling, as described below.

Buyer (or Buying Company)

Any company registered on the system that functions as a buyer. In Oracle Exchange, a buyer's tasks include ordering items, managing price changes submitted by sellers, creating buyer auctions, and so on.

Seller (or Supplier or Selling Company)

Any company registered with the system that functions as a seller. A seller's tasks include adding catalog items, accepting orders created by buyers for the goods it sells, and creating seller auctions.

Purchasing Manager

An Oracle Exchange user who is assigned the Purchasing Manager job function exports suppliers' catalogs, manages pricing changes submitted by suppliers, and views buyer intelligence reports.

Catalog Author

A user who is assigned the Catalog Author job function adds or updates a seller's catalog items or services and prices to the system catalog.

System Catalog

A central catalog repository where all sellers can add their catalog items under a basic, common catalog structure.

System Tasks

System tasks are discrete functions that can be granted to a user. Examples include viewing particular tabs or having access to particular links. System tasks are grouped to form job functions. System tasks are installed with the system.

Job Functions

A job function consists of one or more system tasks that users can perform. For example, one of the tasks that the "Buyer" job function includes is "Create buyer negotiations." A user who has been assigned this job function can perform this task.

A set of default job functions comes installed in the system although the System Operator can create new job functions using the installed tasks. The System

Operator grants job functions to a registered company as appropriate. The Company Administrator then grants the job functions to users as needed. Additionally, a Company Administrator can create new job functions although the Company Administrator cannot make use of any system task not originally granted the company by the System Operator.

1

Overview

This chapter provides an overview of the functional areas with which the designated Company Administrator is concerned.

How to Use This Manual

This manual contains setup information for administrators.

New and Upgrade Company Administrators

If your company is new to the Exchange, you should skip Chapter 2, but read through the rest of this guide. Consult Chapter 3, "Oracle Exchange Setup Overview" on page 3-1 for a list of the setup steps. Some steps are required, others are optional.

If your company has an existing Oracle Exchange account, and your Oracle Exchange instance has recently upgraded, see Chapter 2, "Upgrade Setup Steps" on page 2-1 for a list of new setup steps in releases 6.2.3 and 6.2.4.

Setup Step Details

Once you have identified the appropriate setup steps (the required steps and any optional steps you choose to perform), for each of the setup steps you should consult Chapter 4, "Oracle Exchange Setup Steps" on page 4-1for detailed information on performing the step.

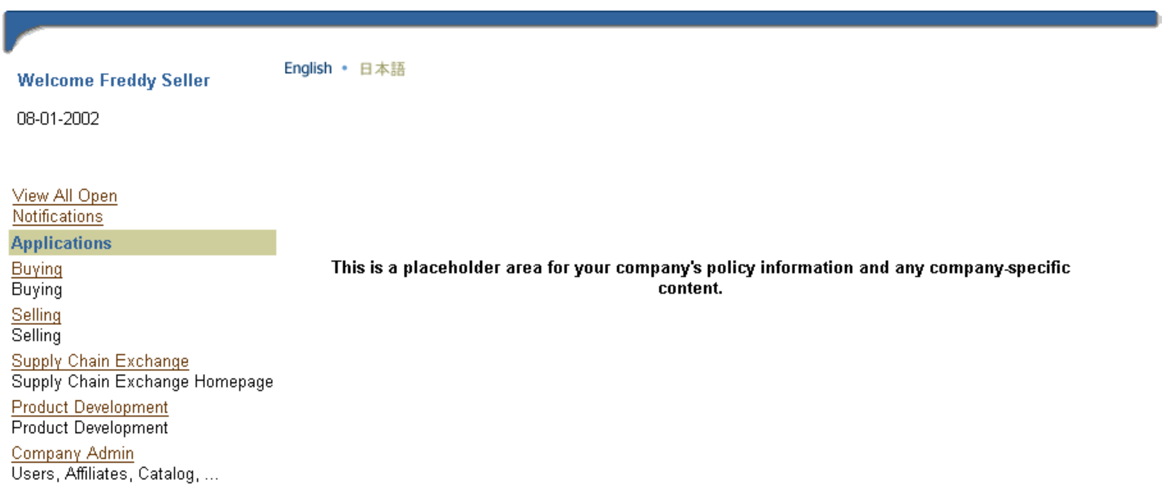
System Operators and Company Administrators

The System Operator is responsible for setting up system-wide functionality. This includes many tasks, such as initial system setup and customization, approving companies' registration requests, and specifying which authorizations are granted to registered companies.

The Company Administrator is the person who is responsible for setting up and managing the system for a particular company. Such setup and maintenance tasks include setting a default company currency, creating negotiation templates, and performing ongoing administrative tasks as needed.

An important part of the Company Administrator's job is to approve uses' registration requests and grant them job functions as appropriate. A Company Administrator cannot grant a job function which has not been granted to the company by the System Operator.

The Company Administration application is available (along with the other applications) on the **Home** page, as seen below:



The following sections provide an overview of the Company Administration functional areas. For information on the other applications, click the Help icon.

Company Registration

The first person to register a company with the system is automatically made the default Company Administrator for that company. Once approved by the System Operator, the default Company Administrator can begin setting up the system, including approving other users' registration requests. The default Company

Administrator can later designate additional Company Administrators to help with administration and maintenance tasks.

Company Administration

The Company Administrator manages the company's setup on Oracle Exchange. This may include creating and maintaining the information discussed in the sections below.

Profile Information

Company Administrators maintain a company-wide profile, which other participants can view in the Trading Partner Directory.

The Company Administrator also sets company-wide profile information (such as company currency and company address). Participants within the company can modify their own settings for time zones, language, and credit card information on the **Edit Personal Information** page. The Company Administrator can also view and maintain some of the participants' profile information (such as password and contact information).

Currency Conversion Rates

The Company Administrator can bulk load company-wide currency conversion rates for use in different company processes. For example, these rates can be used in the company's negotiations. (Negotiation creators can also enter their own negotiation-specific conversion rates).

Trading Partner Key Words

Trading partner key words allow buyers to search for supplier companies.

Trading partner key words can also enable people to search for a company's catalog items using words other than an exact company name.

Address Book

The Company Administrator can create a company address book and a personal address book. The company address book stores a company's complete list of shipping and billing addresses. Participants in that company inherit the company addresses and can decide to keep them as their own address(es), or create their own address(es) in My Profile, if the Company Administrator allows them. The Company Administrator can create additional bill-to, ship-to, and ship-from addresses that participants in the company can select while creating transactions.

The Company Administrator can enforce these addresses or allow participants to create their own.

To use the Offers functionality of Negotiations, Company Administrators must associate one or more company addresses with one or more Business Regions, and also associate users with that Address/Region combination. These users can then create and/or respond to offers associated with that region.

XML Transactions and Transaction Delivery

A Company Administrator can choose which (if any) transactions to send and receive in the form of XML documents. These transactions can be sent from or received into a company's external enterprise resource planning (ERP) or other system.

Transaction Delivery:

- Ensures secure, guaranteed delivery of business documents.
- Provides multiple communication methods, such as HTTP, HTTPS, Oracle Transport Agent, and WebMethods (a third-party licensed product).
- Supports Open Applications Group, Inc. (OAGI) XML standards.

For complete information on transaction delivery and the XML documents used in the Buying and Selling applications, click the Application Setup tab in the Company Administration application. Click the "Transaction Delivery" link, then the "Download Transaction Delivery Guide and DTDs" link. Also see the information in Appendix B, "Transaction Delivery Communication Methods" on page B-1 for more details about each communication method.

Data Mapping

When transaction documents (in OAGI XML format) are exchanged between companies, data mapping is used to define the conversions between the companies' codes (for example, buyers' and sellers' codes) and the system's codes. The Company Administrator enters the conversions (translations) that his or her company uses. For an example, see "Step 3 Enter Transaction Delivery Data Mappings (Buyer and Supplier) (Optional)" on page 4-17.

Billing

The Company Administrator can click the Billing tab in the Company Administration application to see the current charges for particular services. See Appendix C, "Billing" on page C-1 for details on how to view this information (this information is also revealed during registration if the System Operator provides it in the Fee Schedule link). See Appendix C, "Billing" on page C-1 for information on the different billing types and examples.

User Administration

Registration

Users can register one of two ways, depending on what functionality has been allowed by the System Operator. Users can individually submit a registration request online, or the Company Administrator can upload an XML document to bulk load and approve a large number of users.

Online Registration Users can submit registration requests online. The online registration process collects all data needed to set up user accounts. Once the request is submitted, notifications are sent to the Company Administrator. The Company Administrator can then approve these requests. During the approval process, the Company Administrator grants the appropriate job functions to the user.

See Appendix A, "Registration" on page A-1 for a complete picture of the registration process.

Bulk Registration The Company Administrator can bulk load XML documents to quickly add a large number of registrants. The bulk load file can also include updates to existing user information.

Individual approval is not required for bulk load registration since all individuals and companies in the bulk loaded XML document are considered automatically approved. (The "approval" is already given by the Company Administrator bulk loading the registrants.)

Job Function Security

Job functions enable the Company Administrator to control people's access to system features and tasks (for example, tabs, links, and pages). For example, not all users in a company may be allowed to create an Offer to Buy. Only users assigned the Create Buyer's Negotiation job function can perform this task.

Job functions are groups of discrete system tasks (such as the ability to view a tab or access a link). While the complete list of system tasks is set, the System Operator can define which tasks comprise which job functions and can additionally create new job functions using existing system tasks.

Job functions are granted to a company by the System Operator. The Company Administrator in turn assigns all or a subset of those job functions to the users. The Company Administrator can also create new job functions and grant these new job functions to users. Note that the Company Administrator cannot use any system tasks not originally granted to the company by the System Operator. See Appendix D, "Job Functions and System Tasks" on page D-1 for information on the job functions and system tasks initially provided by the system.

Approval Hierarchy

Company Administrators can set approval limits and identify approving managers for each participant in the company to create a supervisory approval hierarchy. The system automatically routes orders outside a buyer's approval limit to the designated approvers using e-mail notifications with links to the order in the system.

Contact and Notifications Designations

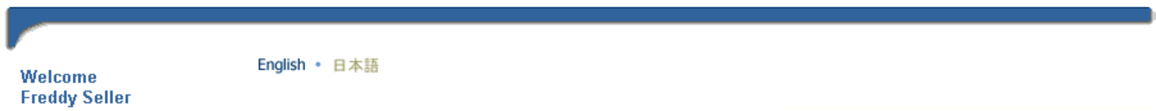
The system uses many types of notifications to keep participants informed of the progress of an action. For example, when a user registers online, a notification is sent to the Company Administrator asking for approval. Or when a negotiation is created, notifications can be sent to the invitees. The Company Administrator can designate a default contact person and/or additional recipients for several types of notifications.

Multilingual, Global Support

Your system may need to support participants using other languages, currencies, or located in multiple time zones. The following sections describe the support available for such a global system.

Multiple Languages

If the system is installed with multiple languages, these languages appear at the top of the **Home** page when people log in, as shown in the following illustration. Only the installed languages (those that the System Operator installed and supports) appear.



When a participant selects a language at the top of the page, the fields, tabs, and buttons automatically change to that language. Customized text, such as the **Welcome** page, also appear in that language if it was translated. The same is true of customized purchase order text if the Company Administrator customized the text in each installed language.

Registration and Administration

Registration e-mail notifications are sent to the registrant in the language that the registrant selects when using the **Home** page to submit a registration request.

After registration, users can specify in which language they wish to receive notifications by updating the **Edit Personal Information** page.

Negotiations

Participants can respond to negotiations in their own language, regardless of the language used by the negotiation owner when creating the negotiation.

Company Administrators can set up a negotiation's terms and conditions in multiple languages. Negotiation participants will see the text in their own language (the language selected on the **Home** page).

Catalog Hosting

Suppliers can bulk load catalog items in any of the installed languages. Buyers can select a language in which to conduct business. That language becomes the default search language unless they identify a different language in their Search profile.

Purchasing

A Company Administrator or Purchasing Manager can customize the purchase order header text for each installed language. Buyers logged on in that language will then see the customized purchase order text in their language.

Intelligence Reports

The Intelligence reports are presented in each user's default language (the language selected on the **Home** page).

Multiple Currencies

Registration and Administration

The System Operator sets a default currency for the system. The Company Administrator can accept this currency as the default company currency or select a different company currency. Users within the company can select a different currency for their transactions if desired.

The Company Administrator bulk loads currency exchange rates that are used for negotiations and order approvals.

Negotiations

Participants can respond to the negotiation in currencies other than the negotiation currency. The currency exchange rates that the Company Administrator loads for the company are used to convert the negotiation currencies. The system uses the currency conversion rates of the company that created the negotiation. Additionally, negotiation owners can enter negotiation-specific conversion rates. (Negotiation owners can choose whether to display these rates to the respondent).

Catalog Hosting

Suppliers can create multiple price lists, each in a different currency. Currency specifications use the standard ISO currency codes that the system provides.

Purchasing

The system creates a separate purchase order for each currency, and for each supplier.

Intelligence

Participants can choose the currency for which they want to view Intelligence reports. (Currency is one of the fields that appears when running the report.) Intelligence reports will present all transactions performed in the chosen currency. Participants can also choose All Currencies to display the currency beside each transaction. A report total is given when a single currency is selected.

Time Zones

The System Operator sets up the default time zone. The default time zone is applied to all persons who register on the system. After their registrations are approved, participants can change their default time zone in the **Edit Personal Information** page in My Profile.

Catalog Hosting

Catalog authors can define price lists with beginning and ending effective dates and times. When a buyer in a different time zone views a price list, these effective dates/times are adjusted to reflect the buyer's time zone.

Intelligence

Participants can also choose the start and end date for Intelligence reports. The time zone of the report is the time zone that is set for the participant (or that the participant sets) in the **Edit Personal Information** page in My Profile.

Negotiations

Negotiations support time zones for both negotiation creation and monitoring. For example, a close date of 5:00 p.m. Pacific Standard Time (PST) closes at 8:00 p.m. Eastern Standard Time (EST).

Setting Up Multi-Lingual Support

Note the following points if you are setting up a multi-language system:

- Translate your trading partner key words if you wish you company to be visible to searches conducted in other languages.
- Individuals in your company can specify a Default Language in the **Edit Personal Information** page, although regardless of what an individual's Default Language setting is, that person can click any language that appears on the **Home** page to change the language just for that logon session. Whatever language is chosen for the individual is what that person sees when conducting transactions, such as creating an order or entering or viewing numbers. For example, American English uses periods to indicate decimal separators in prices or currency conversion rates. German uses commas to indicate decimal separators.

  The default language you specify is the default search language unless you additionally specify a default search language using the Search Options link on the **My Profile** page.

- Some of the setup steps (such as Chapter 4 "Step 4 Edit Trading Partner Preferences (Optional)" include a Language field that enables you to specify the information in multiple languages.
- Translate your catalog items if you want them available in other languages. See the bulk load Readme files for information and instructions on translating items. To download the Readme file, click the "Selling" link on the **Home** page, then click the Catalogs tab. On the **Catalog Authoring** home page, click the "Download Templates/DTDs" link. On the **Download Spreadsheet Templates & XML Resources** page, click Download Now.

Setting Up Multi-Currency Support

If you will be conducting negotiations in multiple currencies (for example, allowing bidders to bid in multiple currencies), upload currency conversion rates as described in "Step 5 Upload Company Currency Conversion Rates (Optional)" on page 4-11, to handle the conversions.

You don't have to upload currency conversion rates for negotiations. The creators of the negotiations can define their own conversion rates on the negotiations.

2

Upgrade Setup Steps

This chapter identifies the new setup steps introduced since the last release of this guide (for release 6.2.2). If your company has an existing Oracle Exchange account, and your Oracle Exchange instance has recently upgraded from release 6.2.2, review all of the steps in this chapter. If your Oracle Exchange instance has recently upgraded from release 6.2.3, review the release 6.2.4 steps in this chapter. If you are not upgrading (you are a new customer), skip this chapter and review the full list of setup steps in "Oracle Exchange Setup Overview" on page 3-1.

For information about how to use the features associated with the setup steps in this chapter, see the online Help.

Release 6.2.3

Define Trading and Customer Groups (Optional)

This feature allows buyers to group themselves into trading groups, and suppliers to group themselves into customer groups. A trading group is a group of buying companies that jointly negotiate with their common suppliers to achieve cost savings typically available only to larger-volume buyers. A customer group enables suppliers to specify the same pricing for several buyers at once.

For more information on defining trading groups, see "Purchasing Setup Steps for Buyers and Suppliers" on page 4-14.

For more information on defining customer groups, see the online Help.

Online Help: Help icon> Buying and Selling> Catalog Authoring> Managing Customer Group Price Lists.

If you would like your users to manage customer groups, you must assign them a job function that includes the OEX: Manage Customer Group system task.

If you would like your users to manage trading groups, you must assign them a job function that includes the OEX: Manage Trading Group system task. Note that the Group Operator job function includes this system task. You may assign this job function to users whom you want to manage trading groups.

If you would like your users to be able to review the list of trading groups to which their company belongs, you must assign them a job function that includes the OEX: Review Group Membership system task.

If you would like your users to be able to withdraw their company from a trading group, you must assign them a job function that includes the OEX: Withdraw from Trading Group system task. For details on how to customize and assign a job function, see "User and Affiliate Administration Setup Steps" on page 4-30.

For more information on job functions and system tasks, see Appendix D, "Job Functions and System Tasks" on page D-1

Configure Category Browsing Tree (Optional)

You may configure which top-level categories display on the **Shopping** home page.

For details on configuring a category browsing tree, see "Purchasing Setup Steps for Buyers and Suppliers" on page 4-14.

Define Minimum Sales Order Amount (Optional)

This feature enables sellers to minimize their overhead costs by defining a minimum sales order amount, which prevents buyers from placing small orders.

For details on defining a minimum sales order amount, see "Purchasing Setup Steps for Buyers and Suppliers" on page 4-14.

Restrict Access to Favorites List (Optional)

The favorites list is a list of a buyer's favorite items. Buyers create their favorites lists by searching for items (in the Buying application), selecting an item, and choosing to add the item to their favorites list. This feature allows you to control user access to favorites lists.

Allowing users to have access to favorites lists requires you assign a job function that includes the OEX: View Favorites List system task.

For details on system tasks and what job functions they are seeded in, see Appendix D, "Job Functions and System Tasks" on page D-1.

For details on how to customize and assign a job function, see "User and Affiliate Administration Setup Steps" on page 4-30.

For more information on the OEX: View Favorites List system task, see Appendix D, "Job Functions and System Tasks" on page D-1.

Release 6.2.4

Customize Job Functions with New System Tasks (Optional)

There are two new features in this release that require you to customize a job function so that it includes a specific system task, then assign that job function to those users whom you want to use the feature. No other setup is required for these new features. These features include:

- **Mass Owner Change (Vacation Handling)** - this feature allows a user to reassign, either permanently or temporarily, the ownership of his or her negotiations or orders to another registered participant within the company. The new owner can perform transactions on the negotiation or orders, and will receive all future e-mail notifications for the transactions (until ownership is transferred back to the original user).
    - To enable users to use this feature, assign a job function that includes the OEX: Reassign Work system task to the appropriate users.

If you (the Company Administrator) assign yourself the OEX: Reassign Work system task, then you can also change ownership of a transaction on the owner's behalf.

- **Enhanced Content Hub** - suppliers and third-party catalog authors can load catalog interchange format (CIF) and commerce eXtensible Markup Language (cXML) files. Buyers can then download these files for their own purposes. For example, catalog administrators in Oracle iProcurement can download the files from Oracle Exchange, then bulk load the files in Oracle iProcurement.
    - To enable suppliers to use this feature, assign a job function that includes the OEX: Catalog Authoring - Manage Catalog Files system task to the appropriate users .
    - To enable buyers to use this feature, assign a job function that includes the OEX: Download Supplier-Defined Catalogs system task to the appropriate users.

There are some new features associated with system tasks that are already seeded in job functions. These new features require you to assign the appropriate seeded job function to a user whom you want to use the feature.

To enable these features, you may also choose to customize a new job function so that it includes the appropriate system task, then assign that job function to a user.

- **Catalog Deletion** - the system task (OEX: Catalog Authoring - Catalog Deletion) associated with this feature allows suppliers to delete all items in its catalog. This feature deletes all items, prices, and price lists the supplier created, including unpublished jobs and prices pending approval. The supplier can also use this feature to delete only those items without prices. (The supplier can load items without prices, but these items do not display to buyers. Deleting all items without prices is a way to clean these items out of the catalog if desired.)
- **Respondent Disqualification** - the system task (OEX: Disqualify Invitees) associated with this feature allows negotiation owners, both buyers and sellers, to disqualify respondents from further participation in or viewing of a private auction or RFQ. Once disqualified, a company can no longer view the negotiation, monitor bidding activity, or submit a new response.

For details on these system tasks and what job functions they are seeded in, see Appendix D, "Job Functions and System Tasks" on page D-1.

For details on how to customize and assign a job function, see "User and Affiliate Administration Setup Steps" on page 4-30.

Set up Buyer-Preferred Pricing View

Like the previous upgrade step, setting up this feature requires only that you assign a new seeded job function to a user whom you want to use the feature (or customize a job function with a new seeded system task, then assign the customized job function to the appropriate user). However, Oracle Exchange includes two existing system tasks that are related to buyer-preferred pricing view, so setup of this feature, and the impact of the existing system tasks on this feature, are explained in this step.

Buyer-preferred pricing view introduces a new system task. You can now control access to catalog items by assigning a job function that includes any of the following three system tasks (in the bullets below, trading group or customer group pricing is considered a buyer-specific price):

- OEX: View All Items - This is an existing system task. If assigned to the buyer, all prices associated with an item are displayed, including both list and buyer-specific prices.
- OEX: View Items with Buyer-Specific Pricing - This is an existing system task. If assigned to the buyer, only items with buyer-specific pricing are displayed.
- OEX: View Items with Preferred Pricing - This is a new system task. If assigned to the buyer, only items with buyer-specific pricing are displayed; however, if buyer-specific pricing is not available, the list price is displayed

Buyers assigned all three system tasks will have access to both buyer-specific pricing and list pricing.

Setting up the buyer-preferred pricing view requires that you assign the OEX: Buyer Preferred Pricing View job function (or any job function that contains the OEX: View Items with Preferred Pricing system task) to your users.

For details on how to customize and assign a job function, see "User and Affiliate Administration Setup Steps" on page 4-30.

For information on the OEX: Buyer Preferred Pricing View job function, and details on what system tasks are included within the job function, see Appendix D, "Job Functions and System Tasks" on page D-1.

Set Up Catalog Bulk Load API (Optional)

This feature enables suppliers and third-party catalog authors to automate the process of loading a catalog file using an application programmable interface (API). Using the API, suppliers do not have to log in to Oracle Exchange to submit their catalog files. Suppliers can use the API to integrate the Oracle Exchange catalog with their catalog content management systems.

For details on enabling this feature, see "Catalog Setup Steps" on page 4-13.

Set Up Punchout Category Preferences (Optional)

If a company plans to choose category preferences when performing a punchout from Oracle iProcurement or Oracle Exchange, or a transparent punchout from Oracle iProcurement, then you will need to define category preferences on the **Punchout and Transparent Punchout Preferences** page.

For details on setting up your punchout category preferences, see "Purchasing Setup Steps for Buyers and Suppliers" on page 4-14.

Define Document Control (Optional)

This feature allows buying and selling organizations to control access to all negotiations. When enabled, users can view subordinates' transactions (including their subordinates' subordinates' transactions) using a new **View My Subordinates' Auctions**, **View My Subordinates' RFQs**, or **View my Subordinates' Offers** page.

For details on defining document control, see "Negotiations Setup Steps" on page 4-20.

Set Up Negotiations API (Optional)

This feature automates the process of loading or exporting a draft auction or RFQ using an application programmable interface (API). For loading, the negotiating company needs to create a tab-delimited spreadsheet text file using a pre-defined format. The file must include all necessary negotiation header information. It can optionally include items and invitees. For exporting, specify the export action on the API command line.

Using the API, users do not have to log in to load or export the file. A listener (using HTTP or HTTPS) waits for incoming files from the companies. After validating user authenticity, file format, and data integrity, a draft negotiation document is created.

For details on setting up the Negotiations API, see "Negotiations Setup Steps" on page 4-20.

Enable Users to View Subordinates' Transactions (Optional)

This feature allows managers to view, on the View My Direct Subordinates' Orders page, purchase orders that their direct subordinates' have created.

To enable this feature, you must define the approval hierarchy. You must also apply the OEX: View Direct Subordinates' Orders system task to a job function, then assign that job function to a user.

For details on defining the approval hierarchy, see "User and Affiliate Administration Setup Steps" on page 4-30.

For details on customizing and assigning a job function, see "User and Affiliate Administration Setup Steps" on page 4-30.

Set up Bulk Load Registration API (Optional)

This feature automates the process of loading company and user registration files using an application programmable interface (API). For example, companies can use the API to export data from their own user and business detailed systems to Oracle Exchange.

For details on enabling this feature, see "Registration" on page 5-1.

3

Oracle Exchange Setup Overview

The following tables and the steps within the tables show the recommended order of the setup steps. Each setup step is described in detail in Chapter 4, "Oracle Exchange Setup Steps" on page 4-1 . These setup steps cover company-wide setup that the Company Administrator performs.

You need to be assigned the Company Administrator job function to perform these steps. For some steps, you may also need additional job function assignments. Any additional job functions you need will be identified in the step's detailed information.

Setting Up Other Exchange Applications

If your company will be using the following applications, see the online Help for their product-specific setup information:

- Oracle Product Development Exchange
- Oracle Supply Chain Exchange
- Oracle Transportation

The Workflow Management section in the Company tab of the Company Administration application is used by the Product Development application. Consult Product Development online Help for instructions on using this function.

Setup Steps

Use the steps listed in the tables below to set up your company on Oracle Exchange. Some of the tasks (mostly concerning registering and approving users) are required, but most are optional. As the Company Administrator, you decide how much to customize.

Table 3–1 Company Registration and Application Setup Performed by: Company Administrator

Step	Step Name	Required?
1	Register Company	Required
2	Set Company Profile	Optional
3	Specify Address Book Settings	Optional
4	Edit Trading Partner Preferences	Optional
5	Upload Company Currency Conversion Rates	Optional

Table 3–2 Catalog Setup Performed by: Company Administrator or Catalog Author

Step	Step Name	Required?
1	Add Catalog Items or Create a Punchout	Optional
2	Enable Catalog Bulk Load API	Optional

Table 3–3 Purchasing Setup Steps for Buyers and Suppliers Performed by: Company Administrator or Oracle Exchange Purchasing Manager

Step	Step Name	Required?
1	Customize Purchase Order Text (Buyer)	Optional
2	Modify Transaction Delivery Settings (Buyers and Suppliers)	Optional
3	Enter Transaction Delivery Data Mappings (Buyers and Suppliers)	Optional
4	Set Up Buyer Pricing Approval Rules (Buyer)	Optional
5	Define Trading Groups (Buyer)	Optional
6	Define Punchout Preferences (Buyer)	Optional
7	Configure Category Browsing Tree (Buyer)	Optional
8	Define Minimum Sales Order Amount (Supplier)	Optional

Table 3–4 Negotiations Setup
Performed by: Company Administrator

Step	Step Name	Required?
1	Define Negotiations Terms and Conditions	Optional
2	Define Company-Specific Reusable Attributes Lists *	Optional
3	Define Company-Specific Reusable Invitation Lists +	Optional
4	Define Company-Specific Negotiation Templates +	Optional
5	Select a Transaction Delivery Method for Negotiation-Generated Purchase Orders	Optional
6	Define Transaction Deliveryv Data Mappings	Optional
7	Assign Regions	Required for Offers Functionality
8	Select Rank Indicator and Define Visibility	Optional
9	Define Document Control	Optional
10	Enable Negotiations API	Optional

* This step can also be performed by anyone with the Manage Attribute Lists job function.

+ Users within the company can also define their own private lists and templates.

Table 3–5 User and Affiliate Administration Setup
Performed by: Company Administrator

Step	Step Name	Required?
1	Review Job Functions Granted by the System Operator	Recommended
2	Customize Job Functions	Optional
3	Set Up a Default Job Functions List	Optional
4	Register and Approve Users	Required
5	Authorize Users for Intelligence Reports	Optional

Table 3–5 User and Affiliate Administration Setup
Performed by: Company Administrator

Step	Step Name	Required?
6	Define Approval Hierarchy	Optional
7	Choose Alternate Default Company Administrator	Optional
8	Designate New Order Contact	Optional
9	Designate Additional Negotiations Notifications Recipients	Optional
10	Approve Affiliates	Required
11	Administer Affiliates	Optional

4

Oracle Exchange Setup Steps

This chapter describes in detail the setup steps a Company Administrator performs to set up Oracle Exchange for a company. These steps fall into five broad categories:

- Company Registration and Application Setup Steps on page 4-1
- Catalog Setup Steps on page 4-13
- Purchasing Setup Steps for Buyers and Suppliers on page 4-14
- Negotiations Setup Steps on page 4-20
- User and Affiliate Administration Setup Steps on page 4-30

Setup steps that apply to other applications, such as Product Development Exchange or Supply Chain Exchange, are documented in those applications' online Help. Click the Help icon in Oracle Exchange to access other applications' setup information.

Company Registration and Application Setup Steps

This section consists of the following steps:

Step 1 Register Company (Required)

Step 2 Set Company Profile (Optional)

Step 3 Specify Address Book Settings (Optional)

Step 4 Edit Trading Partner Preferences (Optional)

Step 5 Upload Company Currency Conversion Rates (Optional)

Prerequisites

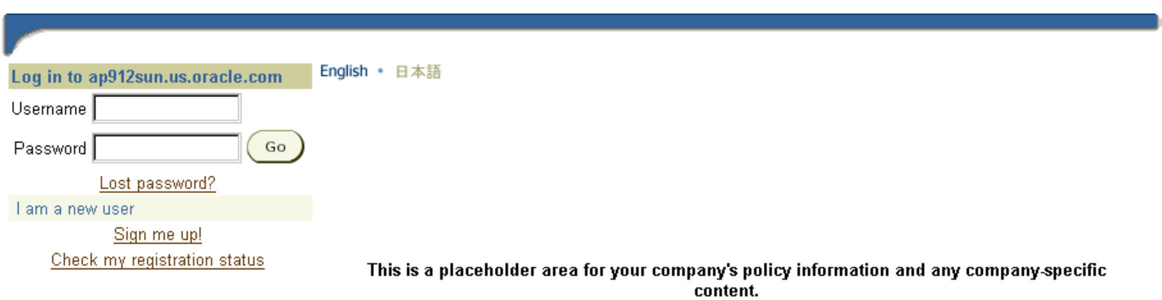
- Obtain the system URL from the System Operator.
- Decide who will be the Company Administrator for your company.
- Review the legal terms and conditions by clicking the "Legal Terms or Use" link on the Home page. (You do not have to be logged in to do this.)

Step 1 Register Company (Required)

The first person to register a company becomes that company's default Company Administrator. Other people in the company, or affiliates of the company who register, need to be approved by the default Company Administrator. (The Company Administrator can appoint another registered user in the company as the default Company Administrator.)

To register:

1. Access the system using the system URL you received from the System Operator. Click the "Sign me up!" link and register online. The registration system prompts you for all the needed information and makes you the default Company Administrator.



2. Wait for approval. You can return to the system **Home** page at a later time and click "Check my registration status" to see whether your request has been approved. Once your company's registration request has been approved, users at your company can start registering with the system, or you can bulk load their registrations.

Step 2 Set Company Profile (Optional)

Follow these steps if you want to edit your company's profile information or provide company key words.

To edit your company profile and key words:

1. Once your registration has been approved, access the Company Administration application (on the **Home** page, click the "Company Administration" link).
2. On the **Company Administration** home page, click the Company tab, then the "Company Profile" link. The Company Profile page displays the same information that you entered when you registered, but you can edit that information if needed.

3. On the **Company Profile** page, check that the Company Currency field displays the currency you want. The Company Currency is the currency in which your company conducts business. For example, if your currency is set to USD, then USD is the default currency that appears whenever someone in you company creates a new negotiation. The company currency that appears by default in the Company Currency field is originally set by the System Operator; however, you can change it as appropriate.
4. In the Company tab, click the "Trading Partner Keywords" link if you want to enter key words that other trading partners can use when searching for your company. Select a language from the drop down menu and enter appropriate key words in the text box. If you are supporting multiple languages, select additional installed languages from the menu and enter key words for those languages.

Step 3 Specify Address Book Settings (Optional)

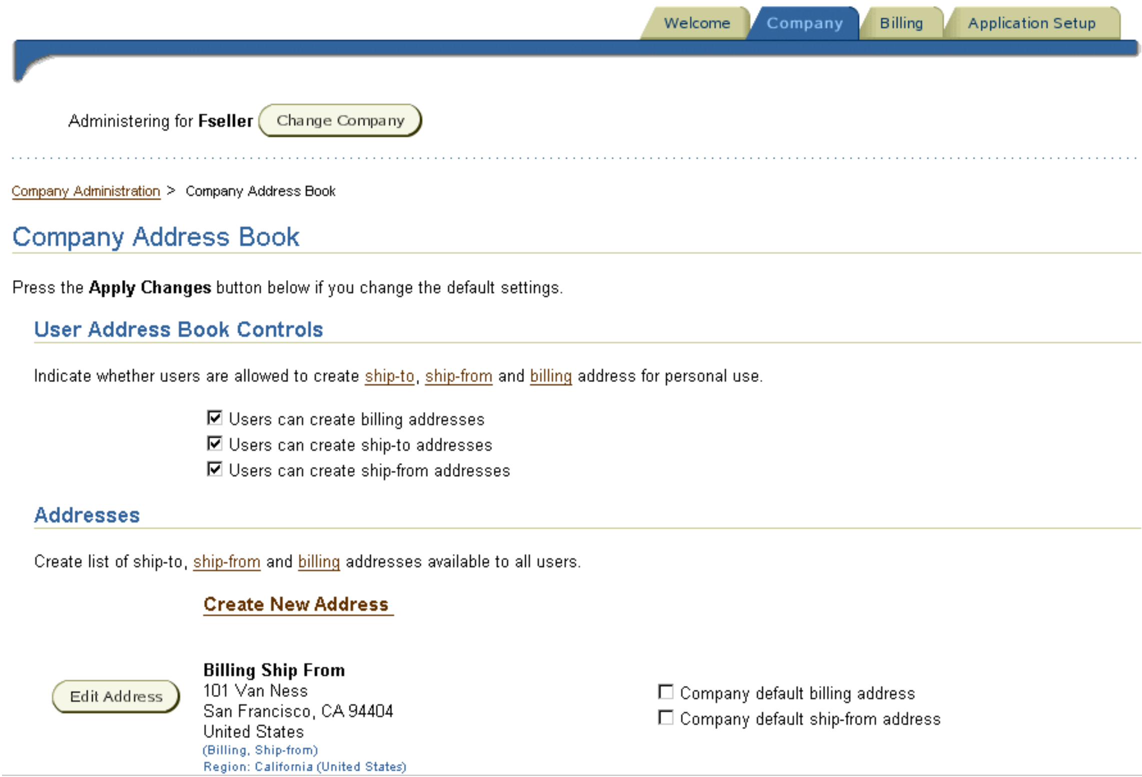
The Company Address Book stores a company's complete list of shipping and billing addresses. While the addresses in the Company Address Book can be viewed by all the users in a company, only the Company Administrator can edit company addresses, enter new company addresses, or set new defaults in the Company Address Book. Users in a company and the Company Administrator can also enter addresses in a Personal Address Book by clicking the My Profile icon, then the "Address Book" link. Both company and personal addresses are displayed in the Personal Address Book.

Once entered into the Company Address Book (or Personal Address Book), addresses cannot be deleted. Addresses can only be edited or deselected as shipping and billing defaults.

Use the Company Address Book to specify ship-to, ship-from, and bill-to addresses that you want people in your company to use.

To create company addresses:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link.
2. Click the Company tab, then the "Company Address Book" link.



3. On the **Company Address Book** page, choose whether you will allow users in your company to specify their own bill-to, ship-to, or ship-from addresses when creating transactions (such as negotiations). (Links online describe what each of these addresses means.)

4. If you want, click the "Create New Address" link to create bill-to, ship-to, and ship-from addresses that users in your company will see as address options when completing transactions.

   To keep your addresses clearly organized, be sure to give different nicknames to each of the addresses you enter.

5. Indicate whether the address is a shipping (ship-to) address, a ship-from address, or a billing address.

6. When you are finished entering information, click OK.

You can set an address as your default address for shipping, ship-from, or billing. This is the address that appears by default in the appropriate address fields on transactions unless users change it or select another address from the address book. If allowed to create their own addresses, users can also set their own personal address defaults, which override the company address defaults.

7. Add other addresses or edit addresses if desired on the **Company Address Book** page.

8. When you have finished updating your Company Address Book, click Apply Changes.

Note: If the System Operator has installed business regions, you will see an Assign Region and Users section when you click Edit Address for an address you have already created and saved. Using this functionality, you can assign an address to a business region, and assign users to a business region. Business regions are used for the offers functionality of negotiations and the Transportation application. For instructions, see "Step 7 Assign Regions (Required for Offers)" on page 4-26.

Step 4 Edit Trading Partner Preferences (Optional)

Trading partner preferences refer to the transaction values that apply when your company buys or sells goods or services.

To pick preferences:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).

2. Click the Application Setup tab, then the "Trading Partner Preferences" link.

3. On the **Trading Partner Preference** page, specify options you wish to use when interacting with your trading partners. Some options are applicable for buyers and others for sellers; some are applicable for both. These are marked below:

4. **Buyers:** Indicate whether suppliers can update shipping information (Quantity, Need-By Date) for individual items in an order.

5. **Sellers: I**ndicate whether buyers can update shipping information (Quantity, Need-By Date, Ship-To Address) for individual items in an order.

6. **Sellers:** Choose whether you will allow multiple shipments for orders (or you can return to this option later if you're not sure yet).

   Multiple shipments allow buyers who are purchasing your items or services to enter different shipping information (ship-to address, need-by date, and mailstop) for individual lines on an order. For example, an order for 10 computer monitors and 20 printers contains two lines; a buyer can ship all the monitors to one address, and all the printers to a different address. The buyer also can specify different need-by dates and mailstops for each line.

7. **Sellers:** In the Terms and Conditions section, select the default value you want to appear on orders sent from buyers. Click Edit to de-select those values you will not accept. You cannot add values but you can contact the System Operator. The System Operator can add, modify, and delete values from these methods and terms so the exact values you see may be different from those described below. For detailed descriptions of each of the values, see the following tables:

Table 4–1 FOB Terms

Look Up Type	Explanation of Values
FOB Terms	Point at which the supplier's responsibility for the goods ceases and the buyer takes title of the goods purchased: ■ Origin. Responsibility ceases upon transfer to carrier. ■ Destination. Responsibility for goods ceases upon acceptance by buyer. ■ CIF. Responsibility for goods ceases at specified location. ■ EXW. Ex Works. Responsibility ceases when the goods become available to the buyer at the supplier's premises. ■ FCA. Free Carrier. Supplier's responsibility ceases when he has handed over the goods, cleared for export, to the buyer's designated carrier at the named place or point. ■ FAS. Free Alongside Ship. Supplier's responsibility ceases when the goods have been placed alongside the vessel on the quay or in lighters at the named port of shipment. ■ FOB. Free on Board. The supplier's obligation to deliver ceases when the goods have passed over the ship's rail at the named port of shipment. ■ CFR. Cost and Freight. The supplier pays the cost and freight to bring the goods to the named port of destination, but the risk of loss/damage to the goods transfers from supplier to buyer once the goods pass the ship's rail in the port of shipment. ■ CPT. Carriage Paid To. The supplier pays the freight for the carriage of the goods to the named destination. ■ CIP. Carriage and Insurance. The supplier pays the freight and cargo insurance for the carriage of the goods to the named destination. ■ DAF. Delivered at Frontier. Obligation ceases when the goods have been made available, or cleared for export, at the named point and place at the frontier, but before the customs border of the adjoining country. ■ DES. Delivered Ex Ship. Obligation ceases when the goods have been made available to the buyer on board the ship uncleared for import at the named port of destination. ■ DEQ. Delivered Ex Quay. Obligation ceases when the goods have been made available to the buyer on the quay at the named port of destination, cleared of importation. ■ DDU. Delivered Duty Unpaid. Obligation ceases when the goods have been made available at the named place in the country of importation. ■ DDP. Delivered Duty Paid. Obligation ceases when the goods have been made available at the named place in the country of importation. ■ Other. If Other is selected, the buyer will be directed to enter a text note explaining FOM terms in the Additional Information field.

Table 4–2 Freight Carriers

Look Up Type	Explanation of Values
Freight Carriers	Carrier chosen to transport the goods to the buyer: ■ DHL Worldwide Express ■ FedEx 2 Day ■ FedEx Freight Services ■ FedEx International ■ FedEx International Economy Freight ■ FedEx Overnight ■ FedEx Same Day ■ Other (enter details in the Notes field) ■ UPS 2nd Day ■ UPS Ground ■ UPS Next Day ■ UPS Worldwide Express ■ United States Postal Service

Table 4–3 Freight Terms

Look Up Type	Explanation of Values
Freight Terms	Provisions for freight payment: ■ Allowed. Supplier reimburses buyer for freight. ■ Due. Buyer pays freight. ■ Other. If Other is selected, the buyer is directed to enter a text note explaining freight terms in the Additional Information - Notes field. ■ Paid. Supplier pays freight. ■ Pre-paid. Supplier pays freight and invoices buyer.

Table 4–4 Payment Methods

Look Up Type	Explanation of Values
Payment Methods	Preferred method of payment for a seller's goods or services: ■ American Express ■ Cash on Delivery ■ Diner's Club ■ Discover ■ Invoice Account ■ MasterCard ■ Other (enter details in the Notes field) ■ Visa

Table 4–5 Payment Terms

Look Up Type	Explanation of Values
Payment Terms	Provision for paying for the goods or services ordered: ■ Immediate. The balance of the transaction is due immediately (on the transaction date). ■ Net 15 (or 30, 45, or 60). The balance of the transaction is due within 15 (or 30, 45 or 60) days of the invoice date. ■ 1/10 Net 30 (or 45 or 60). The buyer will receive a one percent discount if payment is received within 10 days of the invoice date. The balance of the transaction is due within 30 (or 45 or 60) days of the invoice date. ■ 2/10 Net 30 (or 45 or 60). The buyer will receive a two percent discount if payment is received within 10 days of the invoice date. The balance of the transaction is due within 30 (or 45 or 60) days of the invoice date. ■ Other. If Other is selected, the buyer will be directed to enter a text note explaining payment terms in the Additional Information - Notes field.

8. You will return to the Designate Transaction Contacts section later, after you have approved your users. (This section is used to choose a primary point of contact and additional contacts for negotiations and orders. Any notifications that are sent for these transactions can be sent to one the person you designate.)

9. Click Apply Changes.

Step 5 Upload Company Currency Conversion Rates (Optional)

If you will be conducting transactions in multiple currencies (for example, allowing bidders to bid in multiple currencies) or requiring order approvals for orders that buyers in your company create in foreign currencies, upload currency conversion rates to handle the conversions.

To facilitate and standardize currency exchange rate conversion across your company, the currency exchange rates can be used by all users in your company (rather than, for example, requiring each individual user to enter acceptable bid currencies and exchange rates when creating a new auction). You can upload currency conversion rates as frequently as needed. The conversions are not automatically updated. You must update them yourself through bulk loading.

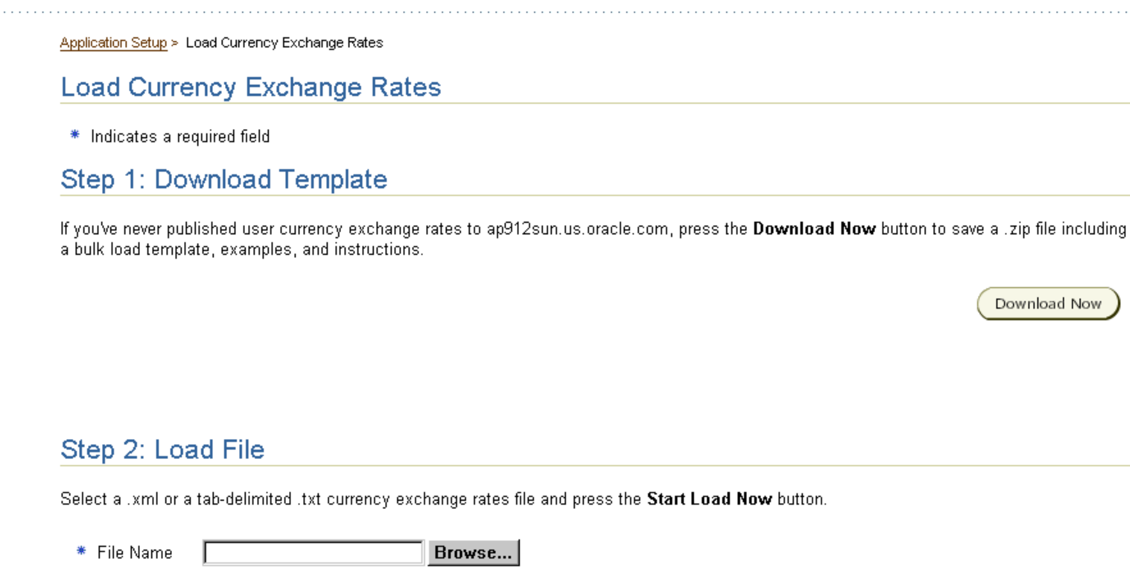
You can bulk load your currency exchange rates using XML-based resources or a spreadsheet-based template.

To bulk load currency exchange rates:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).

2. On the **Company Administration** home page, click the Application Setup tab.

3. Click the "Load Currency Exchange Rates" link.



4. On the **Load Currency Exchange Rates** page, click Download Now for the XML resources, spreadsheet template, and *Readme* instructions file for bulk loading your currency exchange rates.

   Refer to the *Readme* for complete information on loading and understanding the currency conversions.

5. Once you have completed your currency exchange rate files according to the directions in the *Readme*, return to the **Load Currency Exchange Rates** page, click Browse, and locate your currency exchange rate file (saved as a .txt file for spreadsheet-based upload or a .xml file for XML-based upload).

6. Click Start Load Now.

To view bulk loaded currency exchange rates:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).

2. On the **Company Administration** home page, click the Application Setup tab.

3. Click the "View Currency Exchange Rates" link.

4. Select the From and To currency for which you want to see the exchange rate.

5. Click Go.

Catalog Setup Steps

This section consists of the following steps:

Step 1 Add Catalog Items or Create a Punchout (Optional)

Step 2 Enable Catalog Bulk Load API (Optional)

Step 1 Add Catalog Items or Create a Punchout (Optional)

Suppliers can add catalog items to the Oracle Exchange catalog or create a link ("punchout") from Oracle Exchange to their own hosted catalog.

For instructions on adding catalog items to the Oracle Exchange catalog, see the online Help.

Online Help: Help icon> Buying and Selling> Catalog Authoring> Getting Started

For instructions on implementing a punchout, see the *Oracle iProcurement Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange*. To access the guide:

1. Access the Selling Application (on the **Home** page, click the "Selling" link).
2. Click the Catalogs tab.
3. On the **Catalog Authoring** home page, click the "Download the activation kit" link.

Step 2 Enable Catalog Bulk Load API (Optional)

If you would like your catalog authors to be able to automate the process of loading a catalog file using an application programmable interface (API), perform the following steps:

1. Access the Selling Application (on the **Home** page, click the "Selling" link).
2. Click the Catalogs tab.
3. On the **Catalog Authoring** home page, click the "Set Catalog Preferences" link.
4. On the **Set Catalog Preferences** page, choose whether to receive e-mail notifications about bulk load features. This setting sends e-mail notifications for bulk load API and manual bulk load failures. By default, the setting is checked.

5. Return to the **Catalog Authoring** home page and click the "Download Templates/DTDs" link.
6. On the **Download Spreadsheet Templates & XML Resources** page, click Download Now.
7. Save the Zip file to your local disk.
8. From the Zip, extract the following files:

- HttpClient.zip. This file contains sample Java files.
- *Oracle Exchange API Guide*. This file provides information on the API and Java client files.

9. Use these file resources to help you set up your API bulk load.

The tasks you can perform through the API are controlled by the Catalog Authoring system tasks assigned to the user named in the API file.

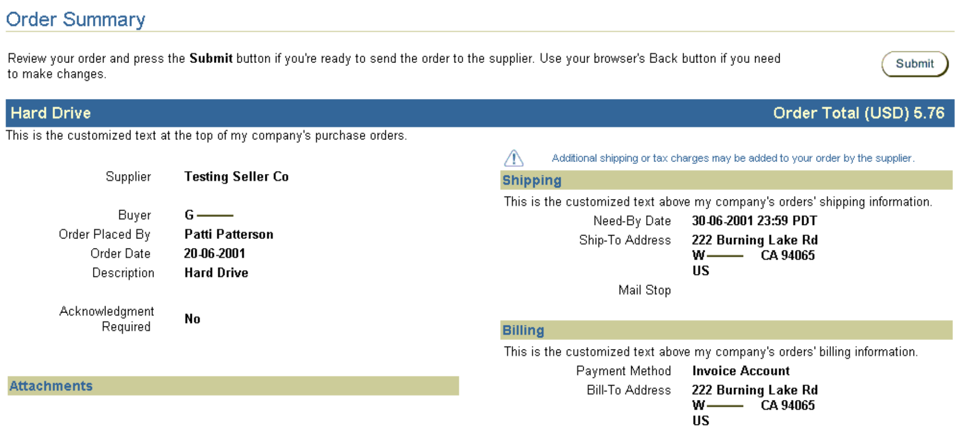
Purchasing Setup Steps for Buyers and Suppliers

This section consists of the following steps:

Except for Steps 4, 5 and 6, you must be assigned the Company Administrator job function to perform these steps. Steps 1- 3, 7, and 8 are performed in the Company and Application Setup tabs of the Company Administration application (as shown in the illustration below). Steps 4 and 6 are performed in the Purchases tab of the Marketplace Buying application; anyone with Purchasing Manager job function can perform these steps.

Step 1 Customize Purchase Order Text (Buyer) (Optional)

You can customize the text that appears on the purchase orders created by buyers in your company. Customized text can appear at the top, as well as above the billing and shipping sections, of the purchase order (as shown in the following illustration):



To customize purchase order text:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link.
2. Click the Application Setup tab, then the "Customize Purchase Order Text" link.
3. Choose the Language in which you want users to see the text. If the system supports multiple languages, create the purchase order text in each language if you want users in other languages to see the text in their preferred language.
4. If you want the language you chose to be the default language, select the "Default language" checkbox. This language will be used if you cannot create the text in a user's preferred language.
5. Enter the order, shipping or billing text you want.
6. Click Preview if you want to see how the text will look before you save it.
7. Click Apply Changes.

Step 2 Modify Transaction Delivery Settings (Buyer or Supplier) (Optional)

If buyers and suppliers want to send and receive documents (such as orders, acknowledgments, and cancellations) in the Open Applications Group, Inc. (OAGI) XML format between Oracle Exchange and their own enterprise resource planning (ERP) or other system, follow the steps below to choose a transaction delivery communication method.

For a list of detailed descriptions of the XML transactions that are sent, including the document type definitions (DTDs) that are used, example transactions, and references to the OAGI standards that are used in the XML documents, access the *XML Transaction Delivery Guide.* See Appendix B, "Transaction Delivery Communication Methods" on page B-1 for more information on the different communication methods supported.

To access the *XML Transaction Delivery Guide*:

1. In the Company Administration application, click the Application Setup tab.
2. Click the "Transaction Delivery" link.

Application Setup > Transaction Delivery

Transaction Delivery

Select a transaction type and press the **Edit Transaction Type** button to choose a communication method. Download Transaction Delivery Guide and DTDs.

Select	Transaction Type	Format	Communication Method
(•)	Advance Ship Notice Inbound	OAG XML Standard	No Electronic Delivery
( )	Advance Ship Notice Outbound	OAG XML Standard	No Electronic Delivery
( )	Billing Activity Inbound	OAG XML Standard	No Electronic Delivery
( )	Billing Activity Outbound	OAG XML Standard	No Electronic Delivery
( )	Billing Customer Information Outbound	OAG XML Standard	No Electronic Delivery
( )	Cancel PO Inbound	OAG XML Standard	No Electronic Delivery

3. On the **Transaction Delivery** page, click the "Download Transaction Delivery Guide and DTDs" link.

   This guide describes XML transactions used by the Buying and Selling applications only.

To enter your company's transaction delivery settings:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link.
2. In the **Company Administration** home page, click the Application Setup tab, then the "Transaction Delivery" link.
3. On the **Transaction Delivery** page, select the transaction type for which you want to enter settings.
4. Click Edit Transaction Type.
5. Select a transaction communication method for the transaction type.
6. Enter the communication method information required for the selected transaction communication method (as applicable). See Appendix B, "Transaction Delivery Communication Methods" on page B-1 for details on each communication methods and its parameters.
7. Click Done.
8. Repeat the above steps for the other transaction types.

Step 3 Enter Transaction Delivery Data Mappings (Buyer and Supplier) (Optional)

When transaction documents are exchanged, data mapping is used to define the conversions between your codes and those used by your trading partner. Enter data mappings if you are using transaction delivery or supplier-hosted catalogs (punchouts).

For example, assume the system uses the unit of measure (UOM) code EA for Each. Your company uses E. You would enter the following values on the **Data Mapping** page (<system name> is the name defined by the System Operator):

<System name> Value: EA

<System name> to My Company: E

My Company to <System name>: E

Another company may use EACH. That company would enter the following values:

<System name> Value: EA

<System name> to My Company: EACH

My Company to <System name>: EACH

When you send and receive documents with the company using XML transaction delivery, your UOM code of E is automatically mapped to the other company's UOM code of EACH. When the company receives the XML document, the UOM code that they receive is EACH, even though the code that you continue to send and use is E.

If you do not enter data mapping settings, and if you do not use the same mapped values as the system, you will receive an XML transaction delivery error.

You can update your data mappings at any time.

To enter your company's data mapping settings:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link.
2. On the **Company Administration** home page, click the Application Setup tab, then click the "Data Mapping" link.
3. On the **Data Mapping** page, select the data type for which you would like to enter settings and click Edit Mapping.
4. Enter your preferred value for documents sent from your system to your company and documents sent from your company to the system. If you want to clear your changes, click Clear Changes.
5. Click Apply Changes.
6. Repeat these steps for the other data types.

Step 4 Set up Buyer Pricing Approval Rules (Buyer) (Optional)

When adding or loading catalog items, a seller can create buyer pricing that is visible only to specific buyers. The designated Purchasing Manager of a buying company can choose to review and approve or reject buyer pricing changes before they are published by setting up pricing approval rules. The pricing approval rules that a buying company sets up apply to all sellers.

For instructions on setting up and using pricing approval rules, see the online Help. Other ongoing Purchasing Manager activities, such as exporting sellers' catalogs, are also covered in the online Help.

Online Help: Help icon > Buying and Selling > Catalog Authoring> Approving Buyer Price lists.

Step 5 Define Trading Groups (Buyer) (Optional)

Multiple buying companies can group themselves into trading groups. A trading group is a collection of companies, created and maintained by the group operator. A trading group enables buyers to jointly negotiate with their common suppliers to achieve cost savings typically available only to larger-volume buyers.

For details on trading groups, see the Purchasing Manager section of the online Help.

Online Help: Help icon > Buying and Selling > Purchasing Management > Managing Trading Group Price Lists.

Step 6 Define Punchout Preferences (Buyer) (Optional)

If your company plans to perform a punchout or transparent punchout from Oracle iProcurement to Oracle Exchange, then you will need to define your company's punchout or transparent punchout preferences.

For details on defining punchout preferences, see the *Punchout and Transparent Punchout Guide for Oracle iProcurement and Oracle Exchange.* To access the guide:

1. Access the Selling Application (on the **Home** page, click the "Selling" link).
2. Click the Catalogs tab.
3. On the **Catalog Authoring** home page, click the "Download the activation kit" link.

Step 7 Configure Category Browsing Tree (Buyer) (Optional)

You may configure which top-level categories display on the **Shopping** home page. For example, you may want to hide categories that your buyers do not need to see.

To customize the category browsing tree for your company:

1. Access the Company Admin application (on the **Home** page, click "Company Admin").
2. Click the Company tab.
3. On the **Company** home page, click "Set Browsing Preferences."
4. On the **Set Browsing Preferences** page, select Yes.
5. Click "Clear All."

6. Select the checkboxes of the top-level categories you would like to display to your end users.
7. Click "Apply Changes."

Step 8 Define Minimum Sales Order Amount (Supplier) (Optional)

Suppliers may wish to prevent buyers from placing small orders (in order to minimize supplier overhead costs), and may define a minimum sales order amount to prevent buyers from placing orders below a pre-defined order limit.

To define a minimum sales order amount:

1. Access the Company Admin application (on the **Home** page, click "Company Admin").
2. Click "Application Setup."
3. Click "Purchasing Preferences."
4. On the **Purchasing Preferences** page, click Update.
5. On the **Minimum Sales Order Amount Preferences** page, click "Create Minimum Sales Order Amount."
6. On the **Add a Minimum Sales Order Amount** page, enter the buyer company, currency, and amount.
7. Click "Apply."

Negotiations Setup Steps

This section consists of the following steps:

You need to be assigned the Company Administrator job function to perform most of these tasks. However, anyone with OEX: Manage Attribute Lists system task can define company-specific reusable attributes lists; anyone with the OEX: Manage Invitation Lists system task can define invitation lists, and anyone with the OEX: Manage Negotiation Templates system task can define templates.

Step 1 Define Negotiation Terms and Conditions (Optional)

Negotiation terms and conditions are presented to participants before they respond to a negotiation for the first time. When responding to a negotiation created by someone in your company, participants must agree to accept your terms and conditions before submitting a response. These terms and conditions are presented to the first user from any company that responds to the negotiation; subsequent responses from that participant, or other users from that participant's company will not require acceptance of the terms and conditions again.

To define negotiation terms and conditions:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).
2. Click the Application Setup tab, then the "Set Up Negotiation Terms and Conditions" link. Use the **Negotiations Terms and Conditions** page to define the terms and conditions that you want to display on negotiations.

   If the system supports multiple languages, select a Language and translate the terms and conditions for each language if your participants speak other languages.
3. Click Apply Changes.

To confirm other terms and preferences (Oracle Exchange):

1. Make sure you have set the following selling preferences as described on page 4-6.

- Payment Terms
- Freight Terms
- Freight Carriers

- FOB

2. Confirm your company's default ship-to, ship-from, and bill-to addresses, which will be used on negotiations (See "Step 3 Specify Address Book Settings (Optional)" on page 4-4).

Step 2 Define Company-Specific Reusable Attribute Lists (Optional)

You can create negotiation attribute lists to include on your auction, RFQ, or offer templates, or to use when creating any new auction, RFQ, or offer. Attribute lists are named groups of item attributes (item characteristics) that apply to items in a negotiation. Attributes define the details that a participant should provide when responding to an item in a negotiation. For example, when an auctioneer adds an item to an auction for vehicles, the auctioneer can add an attribute called *mileage* to specify that the bid item must have fewer that 12,000 miles on the odometer.

If you or your company's users repeatedly include the same item attributes with your negotiation items, attribute lists can streamline new negotiation creation and standardize your negotiation items.

If you include an attribute list on a negotiation template, the attributes on the list will apply to all items added to the negotiation created with that template (though the person using the template can edit and remove attributes as appropriate). Any changes you make to an attribute list are automatically reflected in any templates using that attribute list.

The System Operator can also create attribute lists that are available to all companies on the system.

Except for the attribute list name, you can edit attribute lists after you've created them.

To create or edit a new attribute list:

1. Access the Company Admin application (on the **Home** page, click the "Company Admin" link).
2. Click the Application Setup tab.
3. Click the "Reusable Attribute Lists" link.
4. Click "Create New List."
5. On the **Create Attribute List** page, enter a List Name and brief Description for your attribute list. Choose the Status (Active or Inactive). An Active list can be

used immediately; an Inactive list will be stored in the system, but will not be available for use unless you edit the list and change the list status to Active.

6. To add attributes to your attribute list, click the "Add Attributes" link. An attribute list must include at least one attribute.

7. On the **Add Item Attributes** page, enter your attribute information in the appropriate fields. Required fields are marked with an asterisk (*):

- *Attribute: Enter a name for your attribute (for example, Mileage, PPM Defect Rate; Grade; and so on).
- Response: If you want all participants to enter a value for this attribute when responding, select Required. If you don't want to require participants to enter a value for this attribute when responding, select Optional. If you want this attribute to be displayed to the participant without allowing any response, select Display Only.
- Value Type: Select the type of value that participants should enter for this attribute when bidding. Participants may enter *Text* (letters, words, digits, and so on), *Number* (digits with decimals allowed), *Date* (numbers in date format), or *URL* (Web site addresses that begin with a valid URL protocol such as http://, https://, and ftp://; only values with a URL type display as links; for example a Web site address entered as a *Text* type will display simply as text). The value type you select also governs the value you can enter in the Negotiation Value field. *Text* is the most flexible value type. If you select Text, participants will be allowed to enter letters as well as numbers. If you select *Number*, participants will only be allowed to enter digits; if you select *Date*, participants will only be allowed to enter numbers in date format.
- Value: If desired, set your item specifications by entering a target value for the item in the Value field (for example: "Fewer that twelve thousand miles per vehicle"; "Fewer that eight defects per million parts manufactured"; and so on).
- Display Value to Participants: If you want participants to see the Value, select Yes. If you do not want participants to see the Value, select No.

8. When you have finished entering your attribute information, click Add Another to add another new attribute, or click OK to add your current attribute to your attribute list and return to the **Create Attribute List** page.

9. On the **Create Attribute List** page, review your attribute list name, description, status, and attributes. When you are satisfied with your attribute list, click Submit.

Step 3 Define Company-Specific Reusable Invitation Lists (Optional)

If you typically invite the same core group of participants to many (or all) of your negotiations, you can add these people to a reusable invitation list to use with your negotiations. Using an invitation list can help standardize your business practice by ensuring that all appropriate people are invited to targeted negotiations and help streamline the negotiation process. You can add invitation list(s) when creating a new negotiation; you can also attach invitation list(s) to a negotiation template.

To create a new invitation list:

1. Access the Company Admin application (on the **Home** page, click the "Company Admin" link).
2. Click the Application Setup tab.
3. Click the "Reusable Invitation Lists" link.
4. Click "Create New Invitation List."

   All users in your company with the correct authorizations can view and use Public lists, but only you can edit and use Private lists. The lists you create are immediately available for use. If, at some time in the future, you no longer need a list, you can inactivate it.
5. Click the "Add Members" link to search for and select participants to add to your invitation list.
6. When you have finished adding participants, click Submit.

Step 4 Define Negotiation Templates (Optional)

If the majority of the auctions, RFQs, or offers you create contain the same features—the same attributes, business terms and conditions, response controls, and so on—you may want to create a template that participants in your company can use each time they create a new auction, RFQ, or offer. Using a template can save time by streamlining the negotiation creation process. Your template will contain the features that are similar among the negotiations your company commonly creates. When participants in your company create a new auction, RFQ, or offer using a template, they simply open the template, add to and edit details of the template (if necessary), and publish the negotiation. Templates can be used over and over again.

You can create as many templates as you like. You can create both private templates (templates that only you can view, edit and use as the Company Administrator) and public templates (templates that all users in your company can view and use).

To create a negotiation template:

1. Access the Buying or Selling application (on the **Home** page, click the "Buying" link. Oracle Exchange users can also use the "Selling" link).
2. Click the Negotiations tab.
3. In the task bar directly below the tabs, click Auctions to create auction templates, RFQs to create RFQ templates, or Offers to create offers templates.
4. On the **Auctions** (or **RFQs** or **Offers)** home page, click the "Create Auction (or RFQ or Offer) Template" link.
5. Since many of the fields in the template are the same as those on an actual negotiation, see the online Help for descriptions of the template fields.

   Online Help: Help icon > Buying and Selling > Negotiations > Creating New Negotiations > (see topics on how to create and edit templates).

Step 5 Select a Transaction Delivery Method for Purchase Orders (Optional)

You can export purchase orders created from buyer's auctions and RFQs using the PO from Outbound Buyer's Auction & RFQ transaction delivery document.

When awarding a buyer's auction or RFQ, the buyer can generate one or more purchase orders for auction or RFQ items (one purchase order for each supplier to whom business was awarded). The system will send the purchase order(s) to the buyer using the buyer's selected communication method.

For instructions on selecting a transaction delivery method for auction-generated purchase orders using the PO from Outbound Buyer's Auction & RFQ transaction, see "Step 2 Modify Transaction Delivery Settings (Buyer or Supplier) (Optional)" on page 4-16.

Step 6 Define Transaction Delivery Data Mappings (Optional)

If you are using transaction delivery to generate purchase orders, data mapping is used to perform any necessary conversions between your codes and codes used by your trading partner. Enter data mapping codes used by your company to allow such conversions to be made. See "Step 3 Enter Transaction Delivery Data Mappings (Buyer and Supplier) (Optional)" on page 4-17 for details on defining your codes.

Step 7 Assign Regions (Required for Offers)

The system provides the capability to associate company addresses with particular locations of the country. These associations are called business regions. Business regions are installed by the System Operator and can be as big as a country or as small as a zip code. Once you have associated your company address with a location to create the appropriate business region, your company can be selected by any other companies seeking to transact business only with companies in that business region.

For example, some companies are not capable or are simply not willing to conduct business with other companies that are not in the physical vicinity. In particular, geographical considerations play a critical role in determining shipping costs. Such costs can significantly influence business decisions, and many companies would like to be able to control for such costs at the time a transaction is created.

The System Operator loads the available location values. Once the location values exist in the system, the Company Administrator can associate a company address with the appropriate location to create the business region in which the company wishes to transact business. Business regions can be as broad as an entire country or as small as a postal code. Business regions are used for offers and the Transportation application only.

Once you have associated users with an address that is associated with a business region, those users are authorized to create offers and can restrict the recipients of those offers to a particular business region.

Note: People can create offers only if they are associated with an address that is associated with a region.

If you wish to create Offers to Buy, you must associate your ship-to address with a business region. Additionally, for Oracle Exchange, if you wish to create Offers to Sell, you must associate your ship-from address with a business region.

To assign a company address to a business region:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).
2. Click the "Company Address Book" link. The **Company Address Book** page appears displaying all addresses defined for your company. Scroll through the display until you find the address you wish to assign to a business region.

3. Click the Edit Address button next to the address.
4. Scroll down to the Assign Region and Users section and click Assign.
5. On the **Assign Business Region and Users** page, click Select below the address.
6. On the **Regions** page, select the appropriate country. If you know the exact State, City, or Zip Code, you can enter those values directly.
7. Click the Search button. The **Regions** page shows all business regions that match your search criteria.
8. If you didn't enter a specific State, City, or Zip Code and want your region to be a state, city, or zip code, click a region name to view its sub-regions. For example, click the "United States" link to see its states; click the "Pennsylvania" link to see its cities.

   Remember that the regions you see are only those that the System Operator has provided.
9. Once you have found the region you want to associate with that address, select it and click Submit.

   If you want to assign users to this region see **To assign users to a business region** below.
10. Click Apply Changes.
11. On the **Edit Address** page, click OK.
12. On the **Company Address Book** page, click Apply Changes.

To assign users to a business region:

1. Follow steps 1 - 9 above to assign a company address to a business region.
2. On the **Assign Region and Users** page, scroll to the Assign Users section and click Edit. The **Select Users** page appears displaying all registered users for this company.
3. Specify which users should be defined for this business region by selecting the user's name.
4. When you have finished selecting users, click Submit.
5. Review the list of users, and click Apply Changes. To correct any errors, click Edit to return to the previous page.

6. On the **Edit Address** page, click OK.
7. On the **Company Address Book** page, click Apply Changes.

Step 8 Select Rank Indicator and Define Visibility (Optional)

The system can display the ranking of responses to negotiations participants during the negotiation process. You can choose which type of indicator is used to display rankings. You can also choose whether ranking information is visible during blind auctions or RFQs.

To choose a ranking indicator:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).
2. Click the "Application Setup" link.
3. Click the "Negotiations Configuration" link.
4. In the Rank Indicator section of the **Negotiations Configuration** page, select a default rank indicator. This indicator is then used to display the rank of responses for negotiations created by your company.
5. If you want to allow negotiation creator’s to select a different rank indicator when creating a negotiation, click the checkbox.

To define a ranking visibility for blind auctions and RFQs:

Other respondents’ bid information in blind auctions and RFQs is typically not revealed while the negotiation is taking place. However, if you choose a rank indicator (you choose a rank indicator other than "None"), you can choose to display a bid’s ranking by selecting the appropriate radio button under Should Rank be Visible in Blind Auctions/RFQs.

Step 9 Define Document Control (Optional)

If you would like to control access to negotiation documents, you must:

- Specify the employee-manager approval hierarchy
- Assign the OEX: View Subordinates’ Negotiations system task to a job function, then assign that job function to managers requesting to view subordinates’ negotiations
- Set the security level to private

For details on defining the approval hierarchy, see "Step 6 Define Approval Hierarchy (Optional)" on page 4-37.

For details on how to customize and assign a job function, see "User and Affiliate Administration Setup Steps" on page 4-30.

To set the security level to private:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).
2. Click the Application Setup tab.
3. Click the "Negotiations Configuration" link.
4. On the **Negotiations Configuration** page, select the Private security level. By default, the Public security level is selected. When the Public security level is selected, everyone in the company can view and perform transactions on each others' documents controlled by their respective system tasks.

If you assign the appropriate system tasks, but do not select the Private security level, users cannot access the **View My Subordinates' Auctions** or **View My Subordinates RFQs** page.

Step 10 Enable Negotiations API (Optional)

The negotiations API automates the process of loading or exporting a draft auctions or RFQs. For loading, the negotiating company needs to create a tab-delimited spreadsheet text file using a pre-defined format. The file must include all necessary negotiation header information. It can optionally include items and invitees. For exporting, the company must specify the export action on the API command line.

Using the API, users do not have to log in to load or export the file. A listener (using HTTP or HTTPS) waits for incoming files from the companies. After validating user authenticity, file format, and data integrity, a draft negotiation document is created.

If your company plans to use the negotiations API, complete the following steps:

1. Access the Buying application (on the **Home** page, click the "Buying" link) for buyer's negotiations; access the Selling application (on the **Home** page, click the "Selling" link) for seller's negotiations.
2. Click the Negotiations tab, then click Auctions or RFQs in the task bar directly below the tabs.
3. Click the "Manage Draft Auctions" or "Manage Draft RFQs" link.

4. On the **Manage Draft Auctions** or **Manage Draft RFQs** page, click the "Load Draft Auction from Spreadsheet" or "Load Draft RFQ from Spreadsheet" link.
5. On the **Load Draft Auction from Spreadsheet** or **Load Draft RFQ from Spreadsheet** page, click the link to download a Zip file with instructions on how to perform an automated file upload.
6. Your company must set up its own integration using the API. The instructions provide information about the API.

The tasks you can perform through the API are controlled by the negotiations-related system tasks assigned to the user named in the API file.

User and Affiliate Administration Setup Steps

This section consists of the following steps:

Step 1 Review Job Functions Granted by System Operator (Recommended)

The System Operator specifies which job functions are available to companies registered with the system. Since in most cases, this will initially be a standard set of default job functions assigned to all registered companies, you should review the job functions assigned to you to see if they fully meet your needs.

Compare the job functions you have been granted against the complete set of job functions that are available from the system. These job functions and their system tasks are described in Appendix D, "Job Functions and System Tasks" on page D-1.

Note: The System Operator can customize the initially-provided job functions, so the job functions and system tasks you see in your system may be different from those documented in this appendix.

To view a list of all of the job functions and their tasks assigned to you:

The following steps describe how to view all of the job functions and their tasks that the System Operator has assigned to you.

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).
2. Click the Application Setup tab, then the "Manage Job Functions" link.

   The table on the **Manage Job Functions** page lists the job functions and a high-level description of each. (You may need to click a Go button first, leaving the search fields blank, to see the table.)
3. Click on the function to see its system tasks. The **System Tasks** page displays all the tasks defined to the function.
4. Once you have compared the functions assigned to your company with the possible functions allowed by the system, you may identify a function you feel should be granted to your company. If so, contact the System Operator to request the function.

Step 2 Customize Job Functions (Optional)

The system provides job functions that you, as the Company Administrator, can use to control the access that people in your company have to certain functions. You can use these job functions to create new types of roles and security for participants in your company.

A job function consists of one or more system tasks that participants can perform. For example, two of the tasks that a job function called "Seller" includes are "OEX: Create Event" and "OEX: View Negotiations." A user who has been assigned this job function can perform these tasks. A system participant who has not been assigned a job function that contains these tasks cannot perform these tasks.

The System Operator assigns each company its appropriate job functions, but as the Company Administrator, you can create and edit new ones (not existing ones) for your company's participants. System tasks are predetermined and cannot be edited. Be sure that a user is assigned job functions that contain all of the tasks you want the user to be able to perform. The Company Administrator cannot assign more job functions and tasks than have been assigned to the company by the System Operator.

Note that some features available in Oracle Exchange require no setup beyond assigning, or customizing and assigning, a job function. For example, if you want to enable your users to reassign ownership of their orders and negotiations to another registered user, you need to do one of the following:

- Create and assign a customized job function that includes the OEX: Reassign Work system task.
- Customize and assign an existing job function to include the OEX: Reassign Work system task.

No other setup is required for this feature. (Details on how to reassign work are available to all users in the online Help).

You should review all system tasks and job functions described in Appendix D, "Job Functions and System Tasks" on page D-1, before making decisions about customizing and assigning job functions. See the online Help for more information about the features enabled by these system tasks and job functions.

Warning: You should document any customizations you make so you can reapply them after a product upgrade.

Caution: If you want to create job functions other than those that the System Operator assigns you, generally you should create them before you register and approve other users in your company. If you customize job functions after users in your company are already using the system, be sure to update each person's assigned job functions to use the new ones you created and let users know that their access to certain pages has been updated.

Note: Iif you have affiliates, your customizations to job functions could interfere with job function customizations that the affiliates themselves have performed for their users.

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1. Make a high-level inventory of the business processes that your company will be using. For example, some of these business processes might be industry-specific.
2. Identify the roles and responsibilities of the people in your company who you will register and who will support these processes.
3. Think of the job functions that you would need to cover these roles and responsibilities.
4. Use the instructions in the preceding step to look at the job functions that the System Operator has already assigned your company. Map these to the job functions that you need. Create new job functions if needed. You should not duplicate existing job functions. You may want to contact the System Operator to see if a job function already exists but has not yet been assigned to you, before you create a new one.

To create a new job function:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).
2. Click the Application Setup tab, then the "Manage Job Functions" link.
3. On the **Manage Job Functions** page, click the "Create a new Job Function" link at the top of the page to create your own job function out of existing tasks. You cannot update existing job functions, only create new ones. You can update only new job functions you create. (A job function is typically "owned" by whomever created the job function. Because job functions can only be edited by their owners, you will only be allowed to edit those job functions that you have created. An "Update" link will not appear if you are not the owner of that job function.)
4. Add system tasks to the job function either individually or by copying an existing job function. Follow the guidance on screen to search for the task or job function.

- If you are adding tasks individually, select the checkbox to the left of the system task(s) you want to add to your job function, then click Add to Job Function.

- If you are copying tasks from an existing job function, select the checkbox to the left of the job function(s) from which you want to copy the system tasks, then click Copy System Tasks.
- To delete a system task from this job function, click the "Remove" link for the system task.

5. **5.** When you are satisfied with your changes, click Submit.

Step 3 Set Up a Default Job Functions List (Optional)

Once you have reviewed the job functions granted you by the System Operator and created any new job functions, you can create a default job functions list which you can select and assign to every user who registers on the system. This makes it easier for you to assign default privileges.

To create a default job functions list:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).
2. Click the Application Setup tab, then the "Manage Job Functions" link.
3. On the **Manage Job Functions** page, click "Set default Job Functions to assign when approving users" or "Set default Job Functions to assign when approving affiliate companies" (for Oracle Exchange).
4. Click the "Select and add existing job functions" link to add job functions to the default job functions list. Click the "Create and assign new job function" link if you want to create a new job function for the default job functions list. (See "Step 2 Customize Job Functions (Optional)" on page 4-34 for instructions.) Click the "Remove" link to remove a job function from the default job functions list.
5. When you are finished creating the default job functions list, click Review and Submit. Use your browser's Back button to make additional changes if necessary.
6. If you are satisfied with the changes, click Submit.

Step 4 Register and/or Approve Users (Required)

You are also responsible for approving users at your company and affiliate companies, if any. If you will be allowing and approving affiliate companies, see

Appendix A, "Registration" on page A-1 first, to understand how a hierarchy of companies works.

To register and approve others:

Users can become registered in two ways: online (if allowed by the System Operator), or through a bulk load of user information by the Company Administrator.

Online Registration

If the System Operator has allowed users to enter registration requests online, you will receive an e-mail notifications requesting that you approve the registration requests. To approve registration requests:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).
2. If you have outstanding approvals, you will see a active link under the To Do List. Click this link to go to the **Approve Users** page, or click the Company tab, then click "Approve Users."
3. Select the user(s) and click either Approve or Reject.
4. From the users you are approving, select a user and click Assign Job Functions.
5. Assign users job functions as appropriate. You can use bothjob functions that the system provides, or those that you have created. Click "Select and add existing job functions."
6. Select the job functions appropriate for this user and click Assign to User.
7. Review the assigned job functions. If you have misassigned a function, click Remove to delete it. If you need to add additional job functions, click "Select and add existing job functions" again. Any functions already assigned are retained. When your assignments are correct, click OK.
8. Click Submit.

When you approve a user, you assign the job functions appropriate for that user by selecting from the job functions either granted by the System Operator or created by you.

If the System Operator later grants additional job functions to your company, you will need to explicitly grant them to the appro

priate users. **Note that this includes granting the job function to yourself.**

Bulk Load Registration

Bulk Load Registration allows Company Administrators to easily manage user and affiliate company information. The operations that can be performed through the Bulk Load Registration functionality are essentially the same as those that a Company Administrator can perform through the user interface and that individual users can perform through self-service user interface.

There are two ways to bulk load register. You may upload a single XML file formatted to contain all the necessary information required to register your users, or you may use the Bulk Load Registration API.

To bulk load register with XML, access the Company Administration application and, in the Company tab, click the "Bulk Registration Management" link. Click Download Now for instructions on XML bulk load. (See Self Service vs. Bulk Load Registration in Appendix A, "Registration" on page A-1 for more information.)

To use the Bulk Load Registration API, complete the following steps:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).
2. Click the Company tab.
3. Click the "Bulk Registration Management" link.
4. On the **Bulk Registration Management** page, click the "Download Instructions" link.
5. Save the Zip file to your local disk.
6. Use the resources in the Zip file to help you set up your bulk load registration using the API. The HttpClient.zip file contains sample Java client files.

   The tasks you can perform through the API are controlled by the system tasks assigned to the user named the API file.

Step 5 Authorize Users for Intelligence Reports (Optional)

To enable users to access intelligence reports, assign the appropriate system task to the appropriate job function:

- Assign the OEX: View Seller Negotiations Intelligence Reports task to those job functions needing access to the seller reports, including catalog purchases and sales negotiations.

- Assign the OEX: View Buyer Negotiations Intelligence Reports task to those job functions needing access to the buyer reports, including catalog purchases and buyer negotiations.

Step 6 Define Approval Hierarchy (Optional)

Defining an approval hierarchy will allow you to:

- Define Approval Controls for your Users
- Define Document Control
- Enable Users to View Subordinates' Transactions

Define Approval Controls for your Users

You can define approval controls for orders that people in your company create. For example, if your company has four registered users, you can create approval controls that enable three of them to approve their own orders up to $5,000.00, but for any order over $5,000.00 you require the approval of the other user, who is their manager. These approval controls apply only to orders that you create by adding items to your shopping cart.

Until you define approval controls and limits for someone in your company, that person has unlimited approval authority. For more information about the approval process, see the online Help.

Online Help: Help icon > Buying and Selling > Shopping > Order Approval

Define Document Control

Your company may enable buying and selling organizations to control access to auctions, requests for quotations (RFQs), and offers.

For details on defining document control, see "Step 9 Define Document Control (Optional)" on page 4-28.

Enable Users to View Subordinates' Transactions

You may allow managers to view purchase orders that their direct subordinates have created.

Create Approval Hierarchy

You must approve registered users in your company before you specify them in an approval hierarchy.

To create an approval hierarchy:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).
2. Click the Application Setup tab, then the "Define Order Approval Controls" link. (You can also access this link in the Buying application, in the Purchases tab.)
3. On the **Order Approval Controls** page, select your options and click Apply Changes.
   - Enable Order Approvals? Choose **Yes** to require order approvals. Then specify a default approver. If you want to create a hierarchy of approvers in addition to the default approver, see step 4 below. Choose **No** if you do not want to require order approvals or if you no longer want to use an approval hierarchy that you defined previously.
   - Can order owners approve their own documents? If you choose **Yes**, everyone in your company who creates an order can approve his or her own order up to (and including) the approval limit you set for that person, if any.
   - Who is the default approver? The default approver approves orders when no other approver can be found, when the previous approver did not respond by the Respond By date, when the order total exceeds everyone's approval limits, or when a currency conversion rate is not found for an order created in a foreign currency (in this case, the default approver gets the approval notification first because the system cannot determine the total order amount in the company currency, and therefore cannot determine whose approval limit it falls within).

     Note: The default approver does not have to be the final approver or someone outside the approval hierarchy. For example, someone within the approval hierarchy, with an approval limit and approving manager, could also be the default approver. In that case, that person still needs manager approval for orders he or she creates over his or her approval limit; however, that person also plays the role of default approver when the default approver is needed—for example, when a currency conversion rate is not found for an order created in a foreign currency.

4. Define approval limits and approver relationships to create an approval hierarchy by either or both of the following methods:

- Access the Company Administration application (on the **Home** page, click the "Company Admin" link). Click the Company tab, then the "Registered Users" link. Select a user and click Edit Profile. Scroll down to the Define Order Approval Controls section to specify an approval limit and approving manager for this person.
- If you prefer to create one approval hierarchy, including approval limits, for everyone in your company at once and upload that as a file to the system, access the Company Administration application. Click the Application Setup tab, then the "Load User Approval Controls" link and follow the instructions on the page. Click Download Now to download a WinZip (Zip) file that contains instructions and templates.

You can use any combination of online editing, XML files, and spreadsheet text files to create and update approval limits and an approver hierarchy. See "Administration" on page 5-2 for information on what happens to existing orders when you update your existing approval limits and hierarchy.

Step 7 Choose Alternate Default Company Administrator (Optional)

Once others in your company register, you can authorize them to perform Company Administration operations by assigning them the Company Administration Job Function. Regardless of how many Company Administrators exist, only one can function as the default Company Administrator.

To designate the default Company Administrator:

1. Access the Company Administration application (on the **Home** page, click the Company Admin” link).
2. Click the Company tab, then the "Company Profile" link. In the Designate Default Administrator section of the **Company Profile** page, designate another user in your company as the default Company Administrator for your company if desired.

   Although you (as a Company Administrator) can still perform administrative tasks for your company, the default Company Administrator receives all registration requests for your company and is the single point of contact for administrative tasks. For example, a "contact your Company Administrator" link will provide the e-mail address of the default Company Administrator. Although any Company Administrator in a company can approve a registration request, only the default Company Administrator receives the registration request notifications.

Step 8 Designate New Order Contact (Optional)

You can choose to have a single user receive notifications any time someone places an order with your company. This provides a single point of contact for incoming orders.

To designate the New Order Contact:

1. Access the Company Administration application (on the **Home** page, click the “Company Admin” link).
2. Click the Application Setup tab.
3. On the **Application Setup** page, click "Trading Partner Preferences."
4. On the **Trading Partner Preferences** page, scroll to New Order section.
5. On the **Search and Select: Contact Name** page, and search for the user.
6. Click select the user and click Submit.

Step 9 Designate Additional Negotiations Notification Recipients (Optional)

The system sends e-mail notifications whenever certain processes are executed. For example, when a negotiation is published, e-mails are sent to all companies defined on the invitation list. By default, these notifications are sent to the company administrator, but you can choose to designate additional persons at your company as potential notification recipients.

To designate additional recipients for negotiation notifications:

1. Access the Company Administration application (on the **Home** page, click the “Company Admin” link).
2. Click the Application Setup tab.
3. On the **Application Setup** page, click "Trading Partner Preferences."
4. Scroll to the Designate Transaction Contact(s) area.
5. Click Add.
6. The **Search and Select: Contact** page displays all registered users of the company who are not already designated as a notification recipient.

7. Select one or more users and click Add.

Note that you can create a "user" that actually represents a broadcast list or e-mail group and then designate it as a notification recipient. This is an easy and quick way to have notifications sent to many users at once (for example, all the personnel in your Purchasing department).

Step 10 Approve Affiliate Companies (Required)

You are responsible for approving the registration requests of any affiliate companies. You receive an e-mail notification requesting approval and will also see an active link under the To Do List section of the Company Administration **Home** page if you have outstanding approval requests.

To authorize affiliate companies:

1. Access the Company Administration application (on the **Home** page, click the " Company Admin" link).
2. Click the Company tab.
3. Under Affiliates on the **Company** home page, click "Approve Companies."
4. All unapproved affiliates are displayed under Company Search Results. If you wish to approve a particular affiliate, and it is not displayed, you can search for the company to display it.
5. Select the company and click Approve.
6. On the **Review Approvals** page, check the information. Click Assign Job Functions.
7. On the **Delegate Job Functions** page, "Select and add existing job functions."
8. All the job functions granted your company by the System Operator are displayed under Job Function Search Results. Select the functions you wish to grant to your affiliate and click Assign to Company.
9. When you return to the **Delegate Job Functions** page, click OK.
10. On the **Review Approvals** page, check the functions you granted and if correct, click Submit.

Step 11 Administer Affiliates (Optional)

You can administer both your own company and any affiliate companies. When you access the Company Administration **Home** page directly under the tab bar, you see which company you are administering. Typically, this will be your own company, however, you can choose to administer one of your affiliates by clicking Change Company.

On the **Change Company** page, you see a graphic representing the hierarchy of your affiliate companies. To begin administering an affiliate company, click that company's Select button, and then click OK.

From this point on, you can perform the typical administration tasks discussed in this manual.

5 Ongoing Maintenance

This chapter contains the following sections:

The following sections are not an exhaustive list of ongoing activities you should perform, and your company may have its own list that better suits your business practices. This chapter simply gives you an idea to help you develop your own checklist of ongoing activities.

Registration

If you let people in your company register online, you must approve them. Access the Company Administration application and, in the Company tab, click the "Approve Users" link. (When you bulk load users, they are considered automatically approved, and you need to let them know their user names and passwords.)

If you are registering a large number of users yourself, you may bulk load register. For details on bulk load registering your users, see "User and Affiliate Administration Setup Steps" on page 4-30.

Administration

Maintaining User Access

Grant any new job functions to users as appropriate. For example, the System Operator may have granted your company a new or customized job function. You will have to explicitly grant that job functions to users (including yourself) before anyone can use it. See "Step 4 Register and/or Approve Users (Required)" on page 4-31 for instructions on granting job functions to users.

Maintaining Currency Conversion Rates

Update company currency conversion rates (see "Step 5 Upload Company Currency Conversion Rates (Optional)" on page 4-11) as appropriate.

Maintaining Approval Hierarchies

Update approval hierarchies (see "Step 6 Define Approval Hierarchy (Optional)" on page 4-37) as appropriate. When you change an approval hierarchy, here is what happens to existing orders:

The following approval changes do not affect existing order:

- A change to the Enable Order Approvals section on the **Order Approval Controls** page does not affect existing orders, but affects orders that are created after you save this change.
- A change to the "Can order owners approve their own documents?" section on the **Order Approval Controls** page does not affect existing orders, but affects orders that are created after you save this change.

The following approval changes do affect existing orders:

- A change to the "Who is the default approver?" section on the **Order Approval Controls** page can affect existing orders. If an existing order has not yet gone through the approval hierarchy, or is halfway through the approval hierarchy, the system uses the latest default approver you have specified (if a default approver is needed) rather than the default approver that was specified when the order was first created.
- A change to the approval limits or approver hierarchy affects existing orders. *The system always looks for the latest next approver.* For example, your approvers are as follows, and currently Joe Smith's order for $4,000 is in Anna Garcia's approval queue:

Table 5–1

Company User	User's Approval Limit (USD)	User's Approving Manager
Joe Smith	100	Anna Garcia
Anna Garcia	1,000	Ben Moore
Ben Moore	(No approval limit)	(No approving manager)

You make the changes marked with an asterisk (*) below after Joe Smith's order for $4,000 is submitted and sitting in Anna Garcia's approval queue:

Company User	User's Approval Limit (USD)	User's Approving Manager
Joe Smith	100	Margaret Jones
Margaret Jones*	500*	Anna Garcia*
Anna Garcia	5,000*	Ben Moore
Ben Moore	(No approval limit)	(No approving manager)

Instead of going to Anna Garcia, and then to Ben Moore for final approval, as the order would have done before the changes, Joe Smith's order is now approved and sent to the supplier when Anna Garcia approves it, since $4,000 is now within her approval limit. The next order for over $100 that Joe Smith submits will go first to Margaret Jones for approval. Since his current order was already in Anna Garcia's queue, it did not "go back" to Margaret Jones for approval.

Billing

If your system charges for its services, click the Billing tab in the Company Administration application to see your charges and modify your company's payment information.

To view charges:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).

You need to be assigned the Account Manager job function (or its relevant tasks), to see your company's billing information.

2. Click the Billing tab, then any of the following links:

- Click the "View System Price List" link to view what the system charges for various operations.

> **Note:** See Appendix C, "Billing." on page C-1 for a description of the price list types, such as Spot Purchase or Publish Seller Auction, including examples.

- Click the "View Charges" link to view your company's actual charges. Transactions will have a status of billed only if the system is integrated with Oracle Receivables and the transaction has been invoiced. (Some transactions may be marked with the status Exception. Exception transactions occur when no pricing is currently specified for your company, or some other pricing error occurred. The System Operator is made aware of these exceptions and can resubmit them for pricing later. Once resolved and resubmitted, these transactions reappear without the Exception status.)
- You will see "View Invoices," "View Payments," and "View Credits" links only if the system is integrated with Oracle receivables to process and display invoices and payments online.

To change your company's method of payment:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).

   You need to be assigned the Account Manager job function (or its relevant tasks) to change your company's payment information.

2. Click the Billing tab.
3. Click the "Payment Method" link and choose any of the following payment methods:

- Invoice. Fees incurred by participants in your company will be invoiced at the end of each month.
- Credit Card. Fees incurred by participants in your company will be charged to a designated corporate credit card at the end of each month.

- Electronic Funds Transfer (EFT). Fees incurred by participants in your company will be electronically transferred from a designated bank account at the end of each month.

  Only the payment methods supported by the system are available. Contact the System Operator if you need more assistance.

Your changes are effective immediately (unless you make the change on the day that the payments are due; then the change is effective the next day).

Catalog Hosting

Update Catalog Offerings

Periodically, catalog authors will need to update catalog information. This could include modifying existing information (such as prices) or adding new information, such as new product offerings.

Control Catalog Punchout Availability

If you company has implemented punchout capability to enable buyers to access your locally-hosted catalogs, you may periodically need to disable this access. For example, if you are updating your catalog items or prices, you may wish to remove the visibility of your punchout to buyers until your updates are complete.

1. Sign on to the system with a signon that has Catalog Authoring authority.
2. Access the Buying application (on the **Home** page, click the "Buying" link).
3. Click the Catalogs tab.
4. Click "Configure Catalog Punchout."
5. On the **Configure Catalog Punchout** page, click the "Click here to control the availability of your punchout" link under Step 4: Control Punchout Availability. (Note that the previous steps were performed when the punchout was initially set up and do not need to be performed again).
6. On the **Control Punchout Availability** page, select No and then click Apply Changes. Your punchout no longer appears in the list of punchouts available to buyers.

Note you can re-enable the punchout access at any time.

Applications Setup

Periodically review other setup options that you initially performed For example:

- Review your negotiation invitation lists to reflect the changes in your business.
- Check or update your negotiation attributes lists and templates to streamline the negotiation creation process.
- Check (or have a designated Purchasing Manager check) for supplier price updates for which you require approval, if you set up pricing approval rules.
- Update contact information as necessary.
- Create any new job function required by your users.

A

Registration

This appendix provides information on the following topics:

Independent Entity, Affiliate, and User Registration

When people register on the system, they can register as an *independent entity*, *affiliate*, or *user* of an already-registered company. The System Operator must approve all independent entities. The System Operator can also approve affiliates and users, but this is normally the responsibility of the parent company with whom the affiliate or user is registering.

Independent Entity

If registered as an independent entity, a company will not be associated as an affiliate (subsidiary, division, or branch) of any other company.

Once registered as an independent entity, the Company Administrator will be responsible for administering the company's account and users.

Affiliate

A company can choose to register as an affiliate (subsidiary, division, or branch) of a registered parent company. The parent company must approve the affiliation.

As an affiliate , the company allows the parent company's Company Administrator access to perform administrative tasks for the affiliate company's account at any time. The affiliate Company Administrator will also be able to administer its own company's account and users.

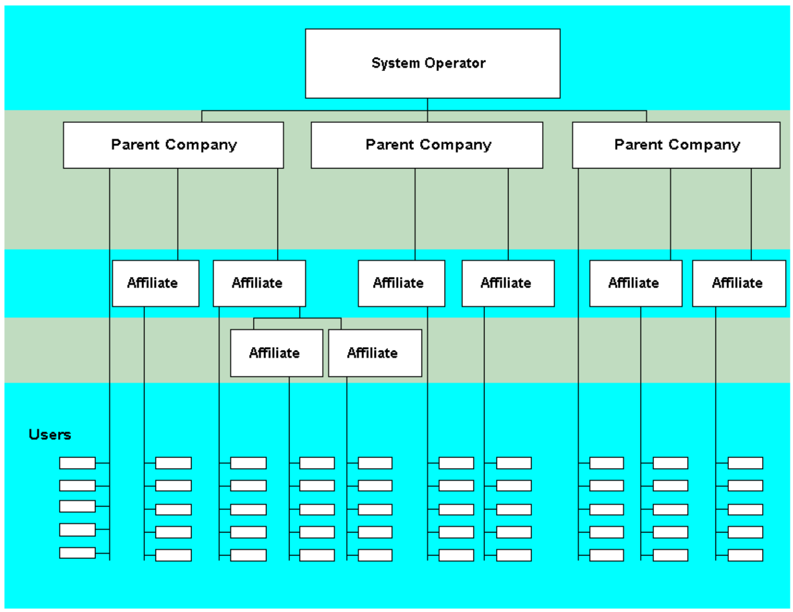
In addition, other companies can register as affiliates of an affiliate company. If this is the case, then the affiliate company will act as both an affiliate (of the parent company) and a parent company (to the company or companies that register as affiliates). The affiliate will allow the parent company's Company Administrator access to perform administrative tasks for its company, and the affiliate will have access to perform administrative tasks for its affiliate company's account.

User Registration

Users can register under a company after the company is registered (as either an independent entity or affiliate). The Company Administrator of the company approves the users and assigns them job functions that will allow them to perform transactions on the system.

Administration Hierarchy with Affiliates

Affiliate companies can have other affiliate companies registered under them, and those affiliates in turn can have more affiliates registered under them. There is no limit to the number of layers of affiliates.



Users can view and navigate a graphical representation of a company’s relationship with its affiliates when registering or administering affiliates.

The System Operator

The System Operator is responsible for approving companies that register as independent entities. The System Operator also can, as an emergency or backup measure, approve affiliates or users of other companies, with the responsible Company Administrator’s permission. When the System Operator approves an independent entity's registration, the System Operator also assigns job functions to that company. Job functions control who has access to certain tabs, pages, and links in the system.

Independent Entity

When a company registers as an independent entity, the registration request is sent to the System Operator for review. Other companies can register as affiliates of the independent entity, with the independent entity's approval, and the independent entity's Company Administrator can administer those companies as well as administer and approve users of his or her own company.

When approving affiliates or users, the Company Administrator also assigns job functions to them. Job functions control who has access to certain tabs, pages, and links in the system. The Company Administrator can also use job functions to give affiliates full or partial administrative control over their company and users.

Affiliate

When a company registers as an affiliate of an independent entity or of another affiliate, the registration request is sent to the Company Administrator of the parent company for approval. Other companies can register as affiliates of another affiliate, with the affiliate's approval, and the affiliate's Company Administrator can administer those companies and administer and approve users of his or her own company. While approving affiliates or users, the Company Administrator also assigns job functions to them. Job functions control who has access to certain tabs, pages, and links in the system. The Company Administrator can also use job functions to give affiliates full or partial administrative control over their company.

User

Users can register only under an already-approved company (an independent entity or an affiliate). A user's registration request is sent to the Company Administrator of the company for approval. While approving users, the Company Administrator also assigns job functions to them. Job functions control who has access to certain tabs, pages, and links in the system.

Relationship between Parent and Affiliate Companies

Any company (an independent entity or an affiliate) with affiliates registered under it is called a parent company. A parent company may choose to do all administrative tasks for an affiliate company, or may give the affiliate full or partial administrative tasks for the affiliate's company. (The affiliate Company Administrator can never be assigned more administrative tasks than the parent Company Administrator has been assigned—only the same tasks, or a subset of those tasks.)

Regardless of whether an affiliate has full or partial administrative rights for its company, the parent Company Administrator can still administer for it. The parent Company Administrator can also administer for its affiliates' affiliates. This means the parent company can click the Change Company button in the Company Administration application, select one of its affiliate companies, and perform any of the administrative tasks in the Company Administration application for that company. However, all notifications to approve users and affiliates that register under an affiliate company are sent only to that affiliate company—but both the affiliate and the affiliate's parent company can approve the affiliate's or user's registration.

Nothing that a parent company does for its own company automatically applies to its affiliates. There is no automatic "inheritance" of a parent company's setup or options to its affiliates, other than that an affiliate can never perform more tasks than its parent company has been assigned. For example, the exchange rates that a Company Administrator of a parent company uploads will be valid only for the parent company. The exchange rates will not be available to any of that parent company's affiliates. (The Company Administrator can upload exchange rates for each affiliate separately when administering for affiliates.) In another example, affiliates also do not "inherit" the buyer prices of their parent company. Prices created specifically for a buyer are visible only to that buying company's users, not its affiliates. A seller would have to create price lists for each company, including each affiliate, and not just for the affiliates' parent company.

Note: If the System Operator deactivates a company, then its users, its affiliates, and its affiliates' users cannot log in.

To administer for affiliate companies:

1. Access the Company Administration application (on the **Home** page, click the "Company Admin" link).
2. In a specific company administration page, click the Change Company button at the top of the page to select and administer for an affiliate company.

Registration and Approval Process

The following sections describe the company and user registration process.

Independent Entity Registration

If registering as an independent entity:

1. Begin registration

   The company begins registering as an independent entity by accepting the role of Company Administrator for the company and entering company and payment information.

2. Read the legal agreement

   If the registrant accepts the agreement:

   If the registrant has the authority to accept the legal agreement and complete the registration submission:

   - Wait for approval. The System Operator reviews the registration request for authenticity, accuracy, and completeness. The registrant may be contacted by the System Operator if questions arise about the registration.

   If the registrant forwards the agreement to a legal representative:

   If the registrant submitted the legal agreement for review by a legal representative in the company:

   - Wait for legal review. The legal representative receives an automated e-mail of the agreement for review and (from the e-mail) submits a response to the agreement directly to the system. The e-mail includes contact information for the System Operator in case the legal representative has questions. If the legal representative does not respond in seven days, the registration request automatically expires (the registrant will be notified by e-mail) and the registrant will need to register again. The System Operator is not informed of the registration request until the legal representative accepts the agreement. The registrant can check the registration status by clicking the "Check my registration status" link on the **Home** page. The status will let the registrant know whether legal review is pending, has been approved, or has been rejected.
   - Receive notification of legal representative’s response. The registrant will receive an automated e-mail notification as soon as the legal representative approves or rejects the agreement. If the legal representative rejects the agreement by responding to the e-mail with Reject, the registration is automatically rejected by the system. The System Operator never received the registration request. The legal representative can discuss the agreement with the Operator offline, and once an agreement is reached, the registrant

can register again. If the legal representative accepts the agreement within seven days, the next step is to await approval from the System Operator.

3. Receive notification of approval or rejection

   When the System Operator approves or rejects a registration request, the system sends an automated e-mail notifying the registrant of the decision. How long it takes to receive a response depends on the System Operator. You can check your registration status by clicking the "Check my registration status" link on the **Home** page. If a request is rejected, the System Operator will provide a reason.

4. Begin business on the system

   If a registration is approved, the registrant can begin business on the system. As part of the approval process, the System Operator chooses which job functions are assigned to the registrant. Job functions control who has access to certain tabs, pages, and links in the system. To check assigned job functions, the registrant can click the My Profile icon in the top right of any page on the system, click "Edit Personal Information," and scroll to the Job Function section of the **Edit Personal Information** page.

Affiliate Registration

If registering as an affiliate of a parent company:

1. Begin registration

   The company begins registering as an affiliate of a parent company by accepting the role of Company Administrator for the company and entering company and payment information.

   Note: The registration request will be submitted to the Company Administrator of the parent company. If the parent Company Administrator approves the registration, the parent Company Administrator may choose to do all administrative tasks for the affiliate company, or may give the affiliate full or partial administrative tasks for its company. Regardless of whether the affiliate has full or partial administrative rights for the company, the parent company's Company Administrator can still administer for the affiliate.

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2. Read the legal agreement

   If the registrant accepts the agreement:

   If the registrant has the authority to accept the legal agreement and complete the registration submission:

   - Wait for approval. The Company Administrator of the parent company reviews the registration request for authenticity, accuracy, and completeness. The affiliate may be contacted by the parent Company Administrator if questions arise about the registration.

   If the registrant forwards the agreement to a legal representative:

   If the registrant submitted the legal agreement for review by a legal representative in your company:

   - Wait for legal review. The legal representative receives an automated e-mail of the agreement for review and (from the e-mail) submits a response to the agreement directly to the system. The e-mail includes contact information for the Company Administrator of the parent company in case the legal representative has questions. If the legal representative does not respond in seven days, the registration request automatically expires (the registrant will be notified by e-mail) and the registrant will need to register again. The Company Administrator of the parent company is not informed of the registration request until the legal representative accepts the agreement. The registrant can check the registration status by clicking the "Check my registration status" link on the **Home** page. The status will let the registrant know whether legal review is pending, has been approved, or has been rejected.
   - Receive notification of legal representative's response. The registrant will receive an automated e-mail notification as soon as the legal representative approves or rejects the agreement. If the legal representative rejects the agreement by responding to the e-mail with Reject, the registration is automatically rejected by the system. The Company Administrator of the parent company never received the registration request. The legal representative can discuss the agreement with the parent Company Administrator offline, and once an agreement is reached, the registrant can register again. If the legal representative accepts the agreement within seven days, the next step is to await approval from the parent Company Administrator.

3. Receive notification of approval or rejection

When the Company Administrator of the parent company approves or rejects the registration request, the system sends an automated e-mail notifying the registrant of the decision. The registrant can check the registration status by clicking the "Check my registration status" link on the **Home** page. If the request is rejected, the Company Administrator will provide a reason.

4. Begin business on the system

   If the registration is approved, the registrant can begin business on the system. As part of the approval process, the Company Administrator of the parent company chooses which job functions are assigned to the affiliate, including whether the registrant has full or partial administrative privileges over its company (see the Note above). Job functions control who has access to certain tabs, pages, and links in the system. To check assigned job functions, the registrant can click the My Profile icon in the top right of any page on the system, click "Edit Personal Information," and scroll to the Job Function section of the **Edit Personal Information** page.

   As an emergency or backup measure, the System Operator can approve a company's affiliates or users.

User Registration

If registering as a user of a company:

When someone registers as a user of a company, the legal agreement has already been reviewed and accepted by the user's company, so the registration approval process is as follows:

1. Begin registration

   The person begins registering as a user of a company by selecting the company you want to register with and entering your user information.

2. Read the legal agreement

   The registrant reads the proposed legal agreement agreed, and submits the registration.

3. Wait for approval

   The Company Administrator reviews the registration request for authenticity, accuracy, and completeness. The registrant may be contacted by the Company Administrator if questions arise about the registration.

4. Receive notification of approval or rejection

When the Company Administrator approves or rejects the registration request, the system sends the registrant an automated e-mail notifying the registrant of the decision. The registrant can check the registration status by clicking the "Check my registration status" link on the **Home** page. If the request is rejected, the Company Administrator will provide a reason.

5. Begin business on the system

   As part of the approval process, the Company Administrator chooses which job functions are assigned to the registrant. Job functions control who has access to certain tabs, pages, and links in the system. To check assigned job functions, the registrant can click the My Profile icon in the top right of any page on the system , click "Edit Personal Information," and scroll to the Job Function section of the **Edit Personal Information** page.

   As an emergency or backup measure, the System Operator can approve a user's registration.

Self-Service vs. Bulk Load Registration

The System Operator decides whether to let companies register themselves online through the system's self-service registration, to turn this feature off and bulk register the companies, or to allow both. (To disable self-service registration, the System Operator would remove this task from the Unknown User job function.)

The Company Administrator of each registered company on the system can also bulk-register users using the "Bulk Registration Management" link in the Company Administration application of the system, or approve individual users' registration requests online.

Online registration requires online review and approval. With bulk load registration, the parties are considered automatically approved once they are uploaded. (However, just as with self-service registration, the "approval" is already given by the System Operator or Company Administrator bulk loading the registrants.) The System Operator or Company Administrator specifies user names and passwords in the bulk load file. When the bulk load completes, the Operator or Administrator must let the registrants know that they can log on. (If desired, users can then change their passwords by clicking the "Edit Personal Information" link in My Profile.)

Some bulk load scenarios include the following:

- The System Operator can bulk load a company and its users.

- The System Operator can bulk load just one representative from each company, and the Company Administrator can use online or bulk load registration to register others in the company.

The System Operator or Company Administrator provides the same information through bulk load registrations as through online registrations. For example, one must designate a default Company Administrator in the bulk load registration file, just as online registration requires. In online registration, the approver assigns job functions while approving the registrant. In bulk loading, one can do the same by specifying job functions for each user in the bulk load file.

For instructions on bulk registering companies, see the *Readme* file that appears in the Zip download when you click Download Now on the **Bulk Registration** page.

B

Transaction Delivery Communication Methods

The transaction delivery communication methods you have to choose from are listed and described in this appendix:

If you will be importing or exporting information using XML, you must choose an XML delivery (or communication) method. The System Operator chooses a communication method using the **Delivery Methods** page in the Billing tab. The Company Administrator chooses a communication method using the **Transaction Delivery** page in the Application Setup tab.

No Electronic Delivery

If you choose No Electronic Delivery, no electronic delivery to your system will take place. You can use No Electronic Delivery with both outbound and inbound transactions.

HTTP

If you choose to have your transactions delivered electronically, you can select the HTTP communication method to have your transactions delivered to your company domain server. You must provide the following information:

- Server Address (full URL where the system can post the data).You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. Use the complete URL, such as http://www.oracle.com:5454/xml/dataReceive.
- Server User ID. You must provide the user ID that the system can use to access your company domain server.
- Server Password. You must provide the server password that will allow the system access into your company domain server.

Note the following business considerations when selecting HTTP as the transmission method:

- There is no encryption on the message; it is therefore susceptible to interception by anyone on the Internet. Sensitive information such as credit card numbers will be transmitted over the Internet without added security.
- There is no guaranteed delivery. Due to the inherent nature of the Internet, once the message is sent from the sending server, there is no way to ensure that the intended recipient actually received the message.

Oracle Transport Agent using HTTP

If you use Oracle Transport Agent to receive XML documents, select the Oracle Transport Agent using HTTP communication method to have your transactions delivered to your company domain server.

The receiving server must have Oracle Transport Agent installed, configured, and running on a server accessible through the Internet, or it must use a servlet that adheres to the Oracle Transport Agent protocol. For installation and configuration instructions, including documentation on the Oracle Transport Agent protocol, see or search the XML Gateway area of Oracle*MetaLink* at http://metalink.oracle.com/.

You must provide the following information:

- Server Address (full URL where the system can post the data).You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. Use the complete URL, such as http://www.oracle.com:5454/xml/dataReceive. If you are sending the transactions to an Oracle Transport Agent receiving server, the server address must be in the following format: http://<receiving domain>:<port>/servlets/oracle.apps.ecx.oxta.TransportAgentServer. For example: http://www.oracle.com:80/servlets/oracle.apps.ecx.oxta.TransportAgentServer.

- Server User ID. You must provide the user ID that the system can use to access your company domain server.
- Server Password. You must provide the server password that will allow the system access into your company domain server.

Note the following business considerations when selecting Oracle Transport Agent using HTTP as the transmission method:

- There is no encryption on the message; it is therefore susceptible to interception by anyone on the Internet. Sensitive information such as credit card numbers will be transmitted over the Internet without added security.
- Messages transmitted using the Oracle Transport Agent method offer guaranteed delivery. If the server information entered by the user is accurate and the user's server is operating correctly, the document is guaranteed to be delivered in its entirety once and only once.

webMethods using HTTP

If you choose to have your transactions delivered electronically, you can select the webMethods using HTTP communication method to have your transactions delivered to your company domain server.

This method uses the webMethods B2B for Partners communication software to transmit your transaction documents over the Internet. The receiving server must have the webMethods B2B server software installed, configured, and running on a server accessible through the Internet. webMethods installation, configuration, and licensing information can be obtained from the webMethods web site at http://www.webmethods.com.

Note: Not all systems come with the webMethods option. If you do not see the webMethods option and want to use it, contact the System Operator for more information. If the system does not already come with the webMethods option, the System Operator must customize the system to provide the webMethods option.

You must provide the following information:

- Server Address (IP Address or Domain Name). You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. You should not provide the full URL (do not put http:// in front of the IP address or domain name). For example, provide an address or name such as 142.83.24.25:5555 or www.oracle.com:5454.
- Server User ID. You must provide the user ID that the system can use to access your company domain server.
- Server Password. You must provide the server password that will allow the system access into your company domain server.

Note the following business considerations when selecting HTTP with webMethods as the transmission method:

- There is no encryption on the message; it is therefore susceptible to interception by anyone on the Internet. Sensitive information such as credit card numbers will be transmitted over the Internet without added security.
- Messages transmitted using the webMethods method offer guaranteed delivery. If the server information entered by the user is accurate and the user's server is operating correctly, the document is guaranteed to be delivered in its entirety once and only once.

HTTPS (Secure HTTP)

If you choose to have your transactions delivered electronically, you can select the HTTPS communication method to have your transactions delivered through a secure connection to your company domain server. You can use HTTPS with both outbound and inbound transactions. You must provide the following information:

- Server Address (full URL where the system can post the data). You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. Use the complete URL, such as https://www.oracle.com:5454/xml/dataReceive.
- Server User ID. You must provide the user ID that the system can use to access your company domain server.
- Server Password. You must provide the server password that will allow the system access into your company domain server.

Note the following business consideration when selecting HTTPS as the transmission method:

- There is no guaranteed delivery. Due to the inherent nature of the Internet, once the message is sent from the sending server, there is no way to ensure that the intended recipient actually received the message.

Oracle Transport Agent using HTTPS

If you use Oracle Transport Agent to receive XML documents, select the Oracle Transport Agent using HTTPS communication method to have your transactions delivered to your company domain server.

The receiving server must have Oracle Transport Agent installed, configured, and running on a server accessible through the Internet, or it must use a servlet that adheres to the Oracle Transport Agent protocol. For installation and configuration instructions, including documentation on the Oracle Transport Agent protocol, see or search the XML Gateway area of Oracle*MetaLink* at http://metalink.oracle.com/.

You must provide the following information:

- Server Address (full URL where the system can post the data). You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. Use the complete URL, such as https://www.oracle.com:5454/xml/dataReceive. If you are sending the transactions to an Oracle Transport Agent receiving server, the server address must be in the following format: https://<receiving domain>:<port>/servlets/oracle.apps.ecx.oxta.TransportAgentServer. For example: https://www.oracle.com:80/servlets/oracle.apps.ecx.oxta.TransportAgentServer.
- Server User ID. You must provide the user ID that the system can use to access your company domain server.
- Server Password. You must provide the server password that will allow the system access into your company domain server.

Note the following business considerations when selecting Oracle Transport Agent using HTTPS as the transmission method:

- Messages transmitted using the Oracle Transport Agent method offer guaranteed delivery. If the server information entered by the user is accurate and the user's server is operating correctly, the document is guaranteed to be delivered in its entirety once and only once.

webMethods using HTTPS

If you choose to have your transactions delivered electronically, you can select the webMethods using HTTPS communication method to have your transactions delivered through a secure connection to your company domain server.

This method uses the webMethods B2B for Partners communication software to transmit your transaction documents over the Internet. The receiving server must have the webMethods B2B server software installed, configured, and running on a server accessible through the Internet. webMethods installation, configuration, and licensing information can be obtained from the webMethods web site at http://www.webmethods.com.

> **Note:** Not all systems come with the webMethods option. If you do not see the webMethods option and want to use it, contact the System Operator for more information. If the system does not already come with the webMethods option, the System Operator must customize the system to provide the webMethods option.

You must provide the following information:

- Server Address (IP Address or Domain Name). You must provide either the Internet Protocol address or the full domain name to which your transactions will be delivered. You should not provide the full URL (do not put https:// in front of the IP address or domain name). For example, provide an address or name such as 142.83.24.25:5555 or www.oracle.com:5454.
- Server User ID. You must provide the user ID that the system can use to access your company domain server.
- Server Password. You must provide the server password that will allow the system access into your company domain server.

Note the following business considerations when selecting HTTPS with webMethods as the transmission method:

- Messages transmitted using the webMethods method offer guaranteed delivery. If the server information entered by the user is accurate and the user's server is operating correctly, the document is guaranteed to be delivered in its entirety once and only once.

Email (SMTP)

If you choose to have your transactions delivered electronically, you can select the SMTP communication method to have your transactions delivered by e-mail. The transaction will be sent as inline text in the e-mail. You must provide the following information:

- E-mail Address. You must provide a full e-mail address to which transactions will be delivered (for example: myname@company.com).

Note the following business considerations when selecting SMTP as the transmission method:

- There is no encryption on the e-mail message; it is therefore susceptible to interception by anyone on the Internet. Sensitive information such as credit card numbers will be transmitted over the Internet without added security.
- There is no guaranteed delivery. Due to the inherent nature of e-mail, once the message is sent from the sending server, there is no way to ensure that the intended recipient actually received the message.

C

Billing

This appendix includes the following topics:

Billing Transaction Types

The system can charge for the transaction types described in this section.

Registration and Administration

Charges related to registration and administration include the following transaction types:

Company Subscription

This billing transaction type specifies a flat monthly fee for the company. The Company Subscription billing activity type defaults a pricing method and type of Amount and Fixed because you specify one flat monthly fee. The fee is not charged until the System Operator uses the **Charge Subscription Fees** page to submit the charges for a given calendar month. (Note that if the System Operator submits subscription fees for a past month, the **Charge Subscription Fees** page uses the current price list assigned to a company to determine the subscription fee charges even if the current price list is different than last month's price list.)

The System Operator can charge a subscription fee in addition to, or instead of, charging by transaction. The System Operator can charge either a company subscription fee, a user subscription fee, or both.

User Subscription

This billing transaction type specifies a monthly fee for a company based on the number of users in that company who are registered that month. For example, if a company has 10 registered users at the beginning of the calendar month, and two more register at the end of that month, the company is charged for 12 users that month even if two of them don't access the system that month. The fee is not charged until the System Operator uses the **Charge Subscription Fees** page to submit the charges for a given calendar month. (Note that if the System Operator submits subscription fees for a past month, the **Charge Subscription Fees** page uses the current price list assigned to a company to determine the subscription fee charges even if the current price list is different than last month’s price list.)

The User Subscription charge is per user. Therefore, the System Operator can use a pricing method of Multiple only. For example, using Multiple/Fixed pricing, the system can charge a flat $5 per user per month. In this example, if 12 users in that company are registered that month, the total charge is $60. Or, using Multiple/Step Direct pricing, the system can charge $5 per user per calendar month for 1-10 registered users and $2 per user per calendar month for 10-20 registered users. In this example, if 10 users in that company are registered that month, the total charge is $20.

The System Operator can charge a subscription fee in addition to, or instead of, charging by transaction. The System Operator can charge either a company subscription fee, a user subscription fee, or both.

Manual charge types

The System Operator can define multiple different manual charge types to track additional miscellaneous charges against a company. Charge information for such charge types must be entered manually against a company. There is a default manual charge type called Miscellaneous Charge which the System Operator can use, or the Operator can define specific manual charge types.

User-defined billing activity type

The System Operator can create his or her own billing activity type. The Operator can use this billing type to integrate with other systems. For example, the actual activities (such as an auction or spot purchase) might occur outside this system, but the billing is performed by this system. In such cases, the Operator can map the external activities to any of the billing activity types described here or to an Operator-defined billing activity type.

Purchasing

Charges related to purchases include the following transaction types:

Spot Purchase

This billing transaction type specifies the charges to be incurred by the supplier when a purchase order submitted by a buyer is approved. A spot purchase order is created when a buyer adds catalog items to the shopping cart and completes the order. (Once the order is approved, it is sent automatically to the supplier.) If the supplier rejects the purchase order by the acknowledge-by date or (if there is no acknowledge-by date) by the need-by date on the order, the supplier is credited back the amount.

Transaction Delivery

This billing transaction type specifies the charges to be incurred for each XML transaction delivery associated with a catalog purchase. These charges are incurred only if the company sets up XML transaction delivery of these documents.

- Purchase Order Outbound (ADD_PO_003). The buyer is charged for the purchase order XML transaction delivery.
- Sales Order Outbound (PROCESS_PO_003). The seller is charged for the sales order XML transaction delivery.
- PO Acknowledgment Outbound. The buyer is charged for XML transaction delivery of the seller's acknowledgment of the purchase order.

Negotiations

Charges related to negotiations include the following transaction types:

Publish Buyer Auction

This billing transaction type specifies the charges to be incurred by the buyer for each buyer auction that gets published. (Once the auction is published, the charges cannot be credited back even if the auction is canceled.) The Publish Buyer Auction type defaults a pricing method and type of Amount and Fixed. This is because there is no transaction amount (for example, no auction award amount) associated with publishing a buyer auction. Therefore, the charge, if specified, is for each published buyer auction.

Award Buyer Auction

This billing transaction type specifies the charges to be incurred by the buyer for each buyer auction that is awarded once the buyer accepts a bid.

Publish Seller Auction

This billing transaction type specifies the charges to be incurred by the seller for each seller auction that gets published. (Once the auction is published, the charges are not credited back if the auction is canceled.) The Publish Seller Auction type defaults a pricing method and type of Amount and Fixed. This is because there is no transaction amount (for example, no auction award amount) associated with publishing a seller auction. Therefore, the charge, if specified, is for each published seller auction.

Seller Auction - Award Bid

This billing transaction type specifies the charges to be incurred by the seller for each seller auction that is awarded once the seller accepts a bid.

Publish Request for Quote

This billing transaction type specifies the charges to be incurred by the buyer for each request for quotations (RFQ) that gets published. (Once the RFQ is published, the system does not credit back the charges if the RFQ is canceled). The Publish RFQ type defaults to a pricing method of Amount and type of Fixed.

Award Request For Quote

This billing transaction type specifies the charges to be incurred by the buyer for each request for quotation (RFQ) that is awarded once the buyer accepts a quote.

Publish Offer to Buy

This billing transaction type specifies the charges to be incurred by the buyer for each offer to buy that gets published. Once the offer to buy is published, the system does not credit back the charges if the offer is canceled. The Publish Offer to Buy type defaults a pricing method of Amount and type of Fixed.

Commitment to Buying Offer

This billing transaction type specifies the charges to be incurred by the buyer once the commitment to the original offer to buy or a related counteroffer to buy is finalized. The commitment may optionally be finalized upon the buyer’s approval. This charge will be reversed if the commitment is cancelled.

Publish Offer to Sell

This billing transaction type specifies the charges to be incurred by the seller for each offer to sell that gets published. Once the offer to sell is published, the system does not credit back the charges if the offer to sell is canceled. The Publish Offer to Sell type defaults a pricing method of Amount and type of Fixed.

Commitment to Selling Offer

This billing transaction type specifies the charges to be incurred by the seller once the commitment to the original offer to sell or a related counteroffer to sell is finalized. The commitment may optionally be finalized upon the seller's approval. This charge will be reversed if the commitment is cancelled.

Supply Chain Exchange

Charges related to the Supply Chain Exchange application include the following transaction types:

Supply Planning

This billing transaction type specifies the charge to the originator of the transaction for importing or exporting a demand or supply transaction related to supply planning. Any time a company imports or exports a demand or supply transaction using XML or a spreadsheet text file, the company who originates the transaction can be charged using this transaction type. The Supply Planning billing activity type defaults a pricing method and type of Amount and Fixed.

Demand Planning

This billing transaction type specifies the charge to the originator of the transaction for importing or exporting a demand or supply transaction related to demand planning. Any time a company imports or exports a demand or supply transaction using XML or a spreadsheet text file, the company who originates the transaction can be charged using this transaction type. The Demand Planning billing activity type defaults a pricing method and type of Amount and Fixed.

Production Sequencing

This billing transaction type specifies the charge to the originator of the transaction for importing or exporting a demand or supply transaction related to production sequencing. Any time a company imports or exports a demand or supply transaction using XML or a spreadsheet text file, the company who originates the transaction can be charged using this transaction type. The Production Sequencing billing activity type defaults a pricing method and type of Amount and Fixed.

Vendor/Customer Managed Inventory

This billing transaction type specifies the charge to the originator of the transaction for importing or exporting a demand or supply transaction related to supplier-managed or customer-managed inventory. Any time a company imports or exports a demand or supply transaction using XML or a spreadsheet text file, the company who originates the transaction can be charged using this transaction type. The Vendor/Customer Managed Inventory billing activity type defaults a pricing method and type of Amount and Fixed.

Examples

The following examples show how the price breaks work for each of the possible Pricing Method and Pricing Type options that you may see when you view the system Price List.

Pricing Methods and Types

Pricing Method

The pricing method specifies what is entered for a Rate or Amount for the price breaks:

- Percent. Charges by percent of the transaction amount. For example, the price breaks can charge 25% for a transaction amount between $0 and $5,000 and 10% for a transaction amount of $5,000 or more. In this example, the company is charged $500 for $5,000 of activity (10% of $5,000 = $500). (Note: The entered value is treated exactly as a percentage. For example, 25 means 25% and .025 means .025%.)
- Amount. Charges a single amount for each price break. For example, the price breaks can charge $10.00 for a transaction amount between $0 and $500.
- Multiple. Currently used for the User Subscription billing transaction type, this pricing method multiplies the rate or amount by the break from/to value. For example, using Multiple/Fixed pricing, the system can charge a flat $5 per user per month. In this example, if 12 users in that company are registered with the system that month, the total charge is $60 (12 x $5).

Pricing Type

The pricing type specifies how the Break From and Break To ranges are broken down:

- Fixed. Charges one amount or percentage per transaction. For a Fixed type, there can be only one price break, from 0 to infinity. The rate or amount is applied per transaction.
- Step Direct. Charges an amount or percentage per fixed range of transaction amounts. (See the examples below.)
- Step Cumulative. Charges a certain amount or percentage per incremental range of transaction amounts. (See the examples below.)

Minimum and Maximum Fees

The system may also charge minimum or maximum fees:

- Minimum Fee. For any transaction amount greater than 0, this minimal amount is charged. For example, if a company incurred only $15 for a spot purchase, but the minimum charge is 20, the company will be charged $20.
- Maximum Fee. No matter what the transaction amount is, the system will not charge more than this amount for any transaction.

Price Break Examples

Amount (Pricing Method) and Fixed (Pricing Type) Example

For the following line break, the charge is $10.00 for every transaction—for example, for every buyer spot purchase. For a Fixed type, there can be only one price break, from 0 to infinity.

Break From	Break To	Amount
0		10.00

If this were a Company Subscription price break, the charge would be $10.00 per calendar month. If this were a User Subscription price break, the pricing method would be Multiple and the charge would be $10.00 per registered user per calendar month.

Amount (Pricing Method) and Step Direct (Pricing Type) Example

For the following line breaks, if a company performs a $2,500 transaction, the charge is $15.00. If a company performs a $1,000 transaction, the charge is $15.00.

Break From	Break To	Amount
0	1,000	10.00
1,000		15.00

If this were a User Subscription price break, the pricing method would be Multiple and the charge would be $10.00 for each registered user per calendar month if the company has under 1,000 registered users.

Amount (Pricing Method) and Step Cumulative (Pricing Type) Example

For the following line breaks, if a company performs a $2,500 transaction, the charge is $25.00: $10.00 is charged for the first $1,000, and $15.00 is charged for the remaining $1,500, since $1,500 falls between 1,000 and 5,000.

Break From	Break To	Amount
0	1,000	10.00
1,000	5,000	15.00
5,000		20.00

If a company performs a $7,000 transaction, the charge is $45.00: $10.00 is charged for the first $1,000; $15.00 is charged for the next $4,000; and $20.00 is charged for the remaining $2,000.

If this were a User Subscription price break, the pricing method would be Multiple and the charge would be $10.00 for each registered user per calendar month if the company has under 1,000 users.

Note: For Step Cumulative pricing only, the Break To is inclusive. For example, using the price breaks above:

- With Step Direct, a transaction amount of $1,000 elicits a $15 charge (the Break To of 1000 is exclusive).
- With Step Cumulative, a transaction amount of $1,000 elicits a $10 charge (the Break To of 1000 is inclusive).

This does not apply to the User Subscription billing activity type. For the User Subscription billing activity type, Step Direct and Step Cumulative pricing behave the same—the Break To is exclusive.

Percent (Pricing Method) and Fixed (Pricing Type) Example

For the following line break, if a company performs a $2,500 transaction, the charge is 10% of $2,500, or $250. For a Fixed type, there can be only one price break, from 0 to infinity.

Break From	Break To	Rate
0		10.00

Percent (Pricing Method) and Step Direct (Pricing Type) Example

For the following line breaks, if a company performs a $2,500 transaction, the charge is 15% of $2,500, or $375. If a company performs a $1,000 transaction, the charge is 15% of $1,000, or $150.

Break From	Break To	Rate
0	1,000	10.00
1,000		15.00

Percent (Pricing Method) and Step Cumulative (Pricing Type) Example

For the following line breaks, if a company performs a $2,500 transaction, the charge is $175: 10% is charged for the first $1,000 ($100) and 5% is charged for the remaining $1,500, since $1,500 falls between $1,000 and $10,000 (5% of $1,500 = $75).

Break From	Break To	Rate
0	1,000	10.00

Break From	Break To	Rate
1,000	10,000	5.00
10,000		2.00

If a company performs a $15,000 transaction, the charge is $650: 10% is charged for the first $1,000 ($100), 5% is charged for the next $9,000 ($450), and 2% is charged for the remaining $5,000 ($100).

Note: For Step Cumulative pricing only, the Break To is inclusive. For example, using the price breaks above:

- With Step Direct, a transaction amount of $1,000 elicits a $15 charge (the Break To of 1000 is exclusive).
- With Step Cumulative, a transaction amount of $1,000 elicits a $10 charge (the Break To of 1000 is inclusive).

D

Job Functions and System Tasks

This appendix provides information on the job functions and system tasks that are initially provided by the system. This includes tables showing which job functions and system tasks are installed with each application. Finally, there is a table displaying each job function and the system tasks of which it is composed.

In this appendix, job functions and system tasks with a status of "Inactive" are no longer used in release 6.2.4. In addition, the system tasks included in the Dummy Responsibility job function are assigned the status of "New/Unassigned." These unassigned system tasks must be added to customized job functions before their corresponding system functionality can be utilized.

- System Operators - It is not recommended you assign the Dummy Responsibility job function to companies. It is recommended that you note each system task included in the Dummy Responsibility job function, assign those system tasks to customized job functions, then assign those customized job functions to companies.
- Company Administrators - The Dummy Responsibility job function should not appear in Oracle Exchange. If your System Operator has created and assigned customized job functions that include the system tasks delivered in the Dummy Responsibility job function, then you will be able to assign these customized job functions, or create your own customized job functions with those system tasks.

For details on how to customize a job function, see "Step 2 Customize Job Functions (Optional)" on page 4-31.

This appendix consists of the following tables:

Job Functions Tables

The following job functions come installed with the system. The System Operator decides which job functions are granted to a registered company. That company's Company Administrator then decides which of the authorizations granted to the company are assigned to a particular user.

Note that the System Operator can customize job functions before assigning them to a company.

Table D–1 Installed Job Functions for Oracle Exchange

Job Function Name	Description	6.2.4 Status
Account Manager	Manage billing activity.	No change
Authenticated User	Allow a certain set of tasks that a user can perform after logging onto the system.	Inactive
Buyer	Purchase any item, link out to supplier catalogs to purchase items, bid in seller negotiations, and create buyer negotiations.	No change
OEX: Buyer with Preferred Pricing View	Purchase items at the buyer-specific price, if both buyer-specific and list prices are provided; link out to supplier catalogs to shop; bid in seller negotiations, and create buyer negotiations	New

Table D–1 Installed Job Functions for Oracle Exchange

Job Function Name	Description	6.2.4 Status
Buyer with Restricted Pricing View	Purchase only those items with buyer-specific pricing and group-specific pricing.	No change
Buying Professional	Purchase any item, link out to supplier catalogs to purchase items, bid in seller negotiations, create buyer negotiations, export supplier catalogs, and view buyer intelligence reports.	No change
Catalog Author	Maintain and publish catalogs.	Updated
Company Administrator	Manage the company account, including approving and managing users and affiliate companies, and assigning, delegating, and customizing roles.	Updated
Dummy Responsibility	This is a dummy responsibility to deliver the Catalog Authoring - Manage Catalog Files, Download Supplier-Defined Catalogs, View Subordinates' Negotiations, View Direct Subordinates' Orders, and Reassign Work system tasks.	No change
Group Operator (Manage Purchasing Groups)	Manages and Operates Trading Groups.	No change*
Purchasing Manager	Export suppliers' catalogs, manage pricing changes submitted by suppliers, and view buyer intelligence reports.	No change
Seller	Sell items, acknowledge orders from buyers, bid in buyer negotiations, create seller negotiations, and view seller intelligence reports.	No change
Third Party Catalog Author	Maintain and publish third party catalogs.	Updated
Transaction Manager	Manage XML transactions.	No change
Unknown User	Allow a certain set of tasks that a user can perform before logging on to the system.	No change

* This job function was introduced in release 6.2.3

Table D–2 Installed Job Functions for Oracle Sourcing

Job Function Name	Description	6.2.4 Status
Sourcing Buyer	Allows users to create and award buyer's negotiations, and view buyer intelligence reports.	Inactive
Sourcing Buying Company Administrator	Manage the company, including approving and managing users, and assigning, delegating, and customizing job functions.	Inactive
Sourcing Seller	Allows users to respond to buyer's negotiations	Inactive
Sourcing Selling Company Administrator	Manage the company, including approving and managing users, and assigning, delegating, and customizing job functions.	Inactive

Table D–3 Installed Job Functions for Oracle Product Development Exchange

Job Function Name	Description	6.2.4 Status
Extensible Attribute Administrator	Extensible attribute administrator	No change
Product Development Administrator	Product development administrator	No change
Product Development Executive	Product development executive	No change
Product Development User	Product development user	No change

Table D–4 Installed Job Functions for Oracle Transportation Exchange

Job Function Name	Description	6.2.4 Status
Oracle Transportation Manager	User can perform any activity related to Transportation Exchange	No change

Table D–5 Installed Job Functions for Oracle Supply Chain Exchange

Job Function Name	Description	6.2.4 Status
Supply Chain Administrator	The user can create and modify supply and demand data, and create and manage Collaboration Management functions.	No change
Supply Chain Planner	The user can create and modify supply and demand data.	No change
Supply Chain Reviewer	The user can view supply and demand data.	No change

System Tasks Tables

The following tables list the system tasks that come installed with the designated application.

Note that some tasks are shared between applications. See "Job Function/System Task Cross-Reference" on page D-19 for a breakdown of the system tasks which comprise each job function.

Table D–6 Installed System Tasks for Oracle Exchange

System Task Name	Description	6.2.4 Status
OEX: Accept or Reject Order Cancellation or Change Requests	User can accept or reject the order cancellation or change requests.	No update
OEX: Access Threaded Discussions	User can access threaded discussions.	No update
OEX: Access To Do List	User can access personalized To Do List.	No update
OEX: Access Trading Partner Directory	User can access the Trading Partner Directory.	No update
OEX: Acknowledge Orders	User can acknowledge orders placed with the user's company.	No update
OEX: Add Invitees to Open Negotiations	Users can add invitees to any in-progress negotiation created by their company.	No update
OEX: Administer for Affiliate Companies	User can perform administrative tasks (in the Admin tab) for affiliate companies.	No update

Table D–6 Installed System Tasks for Oracle Exchange

System Task Name	Description	6.2.4 Status
OEX: Administer Registration	User can approve registration of other users in the company and of affiliate companies, assign roles to the users, delegate roles to the affiliate companies, and customize roles.	No update
OEX: Approve or Reject Order Cancellation Requests	User can approve or reject order cancellation requests.	Inactive
OEX: Award Negotiations	User can make an award decision for any negotiation created by their company.	No update
OEX: Bulk Load Users and Companies	User can access the bulk loading functionality to create or update users and affiliate companies.	No update
OEX: Cancel Event	User can cancel any negotiation event created by their company.	No update
OEX: Cancel Negotiations	Users can cancel any negotiation event created by their company.	No update
OEX: Cancel or Request Order Cancellation	User can cancel or request for order cancellation.	No update
OEX: Catalog Authoring - Add and Update Item Online	User can add and update items online.	No update
OEX: Catalog Authoring - Add and Update Pricing Online	User can add and update pricing online.	No update
OEX: Catalog Authoring - Bulk Load Catalog	User can bulk load catalog data.	No update
OEX: Catalog Authoring - Catalog Deletion	User can perform mass deletion of catalog or items using the online catalog deletion feature.	New
OEX: Catalog Authoring - Configure Catalog Punchout	User can configure catalog punchout.	No update
OEX: Catalog Authoring - Configure Item Availability	User can configure item availability.	No update

Table D–6 Installed System Tasks for Oracle Exchange

System Task Name	Description	6.2.4 Status
OEX: Catalog Authoring - Control Buyer Catalog Exports	User can control catalog load.	No update
OEX: Catalog Authoring - Control Catalog Load	User can control catalog load	No update
OEX: Catalog Authoring - Delete Item Online	User can control catalog load.	No update
OEX: Catalog Authoring - Delete Pricing Online	User can delete pricing online.	No update
OEX: Catalog Authoring - Export My Catalog	User can export my catalog.	No update
OEX: Catalog Authoring - Image Load	User can load image.	No update
OEX: Catalog Authoring - Manage Catalog Files	User can manage catalog files.	New/ Unassigned
OEX: Catalog Authoring - Manage Third Party Authoring	User can manage third party authoring.	No update
OEX: Catalog Authoring - Perform Third Party Authoring	User can perform third party authoring.	No update
OEX: Catalog Authoring - Review and Publish Bulk load Jobs	User can review and publish bulk load jobs.	No update
OEX: Catalog Authoring - View Catalog Resources	User can view catalog resources.	No update

Table D–6 Installed System Tasks for Oracle Exchange

System Task Name	Description	6.2.4 Status
OEX: Catalog Authoring - View Item	User can view items.	No update
OEX: Catalog Authoring - View Pricing	User can view pricing.	No update
OEX: Change Negotiations' Close Date	Users can change the close date of any negotiation created by their company.	No update
OEX: Change Order	User can change order.	No update
OEX: Check Availability	User can check item availability while shopping.	No update
OEX: Control Pricing Approval	User can set up pricing approval rules for pricing changes submitted by suppliers	No update
OEX: Create Add-to-Cart Order	User can create a purchase order for items selected from the catalog.	No update
OEX: Create Buyer's Negotiation	Users can create buyer's negotiations, private templates and invitation lists. They can also copy, unlock, unseal, cancel and award the negotiations they have created.	No update
OEX: Create Event	Users can create negotiation events. They can also cancel any negotiation events they created.	No update
OEX: Create Minimum Sales Order Amount	User can create new Minimum Sales Order Amount	No update*
OEX: Create Seller's Negotiation	Users can create seller's negotiations and publish them to buyers. They can create private templates, invitation lists and also copy, unlock, unseal, cancel and award the negotiations they have created.	No update
OEX: Define Custom Purchase Order Templates	User can define custom purchase order templates for the user's company and affiliate companies.	No update
OEX: Disqualify Invitees	Users can disqualify or reactivate respondents from any in-progress auctions or RFQs that they can access.	New
OEX: Disqualify Responses	Users can disqualify responses submitted to any negotiation created by their company.	No update

Table D–6 Installed System Tasks for Oracle Exchange

System Task Name	Description	6.2.4 Status
OEX: Download Supplier-Defined Catalogs	User can download supplier-defined catalogs.	New/ Unassigned
OEX: Edit Business Regions	User can create and edit Business Regions for the company.	No update
Edit Geographical Regions	Operator can create and edit regions.	Deleted
OEX: Export Supplier Items	User can export supplier items to a file.	No update
OEX: Get Password Assistance	User can get password assistance.	No update
OEX: Log On	User can access the Log On page.	No update
OEX: Manage Attribute Lists	Users can manage attribute lists for the entire company.	No update
Manage Bidders List	Users can manage both public and private invitation lists. If not authorized with this function, they can create and manage only their own private invitation lists.	Renamed to OEX: Manage Invitation Lists
OEX: Manage Customer Group	User can create customer groups and administer the membership of customer groups.	No update*
OEX: Manage Draft Negotiations	User can edit, delete, and publish draft negotiations.	No update
OEX: Manage Invitation Lists	User can create and manage public invitation lists in addition to user's private invitation list	No update
OEX: Manage Negotiation Templates	User can manage negotiation templates. If not authorized with this function, users can create and manage only their own private templates.	No update
OEX: Manage Punchout Access	Manage Punchout Access	No update
OEX: Manage Regional Addresses	User can view and update current assignments to company regional addresses.	No update
OEX: Manage Trading Group	User can create trading groups, administer the membership of trading groups, and manage prices assigned to trading groups.	No update*

Table D–6 Installed System Tasks for Oracle Exchange

System Task Name	Description	6.2.4 Status
OEX: Punch Out to Supplier Sites	User can link to supplier sites, shop, and bring back a purchase order from that site to the system.	No update
OEX: Reassign Work	User can reassign orders, negotiations, and notifications to another user.	New/ Unassigned
OEX: Receive Orders	User can acknowledge receipt of items the user ordered.	No update
OEX: Receive XML Failure Messages	Receive e-mail and notification messages in the event of a failure of an XML message.	No update
OEX: Receive XML Success Messages	Receive e-mail and notification messages in the event of a success of an XML message.	No update
OEX: Register	User can register and check the status of the registration.	No update
OEX: Respond to Buyer's Negotiation	As a seller, a user can respond to any buyer's negotiation.	No update
OEX: Respond to Seller's Negotiation	As a buyer, a user can respond to any seller's negotiation.	No update
OEX: Review and Approve Price Changes	User can approve or reject pricing changes submitted by suppliers.	No update
OEX: Review Group Membership	User can review a list of trading groups to which his or her company belongs.	No update*
OEX: Set Browsing Preference	User can customize the category browsing tree for the entire company.	No update*
OEX: Test Inbound Transactions	User can test the inbound transaction of XML documents.	No update
OEX: Unknown User	Allow a certain set of tasks that a user can perform before logging on to the system.	No update
OEX: Unlock Draft Negotiations	User can unlock draft negotiations.	No update
OEX: Unlock Sealed Negotiations	Users can unlock any sealed negotiation created by their company.	No update
OEX: Unseal Sealed Negotiations	Users can unseal any sealed negotiation created by their company.	No update

Table D–6 Installed System Tasks for Oracle Exchange

System Task Name	Description	6.2.4 Status
OEX: View About Page	User can view the About page.	No update
OEX: View Admin Page	User can view the Admin tab. (Separate tasks control the user's access to functions within the tab.)	No update
OEX: View All Charges	User can view the charges for the user's company activity.	No update
OEX: View All Items	User can search and review all catalog items. (Separate tasks control whether the user can purchase the items.)	No update
OEX: View Billing Activity	User can view billing activity, such as invoices, for the user's company if these are displayed on the system.	No update
OEX: View Billing Tab	User can view the Billing tab.	No update
OEX: View Buyer Negotiations Intelligence Reports	User can view negotiations intelligence reports for buying activity performed by the user's company.	No update
OEX: View Buying	User can view buying welcome page.	No update
OEX: View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)	No update
OEX: View Catalog Purchases Intelligence Reports	User can view catalog purchases intelligence reports for buying activity performed by the user's company.	No update
OEX: View Catalog Sales Intelligence Reports	User can view catalog sales intelligence reports for selling activity performed by the user's company.	No update
OEX: View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)	No update
OEX: View Checkout Button and Messages	User can view the Checkout button and all related messages in the shopping cart.	No update
View Company defined Currency Exchange Rates	View Company defined Currency Exchange Rates	Deleted
OEX: View Company Information	User can access the View Company Information page to view the user's company information.	No update

Table D–6 Installed System Tasks for Oracle Exchange

System Task Name	Description	6.2.4 Status
OEX: View Company's Orders	User can view company's orders.	New - Renamed from View Orders - Manager
OEX: View Direct Subordinates Orders	User can review a list of trading groups to which his or her company belongs.	New/ Unassigned
OEX: View Favorites List	User can view favorites list (list of user's favorite items to buy).	No update*
OEX: View Events	Users can view details of any event created by their company.	No update
OEX: View Home Page	User can view the Home page.	No update
OEX: View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)	No update
OEX: View Items with Buyer-Specific Pricing	User can search and review only those catalog items with buyer-specific pricing and group-specific pricing. (Separate tasks control whether the user can purchase the items.)	No update
OEX: View Items with Preferred Pricing	When shopping, user sees buyer-specific prices if both list and buyer-specific prices are provided. If both buyer-specific and group prices are provided, the user sees both. If neither buyer-specific nor group prices are provided, user sees list prices. .	New
OEX: View Company Administration Guide	User can view the *Company Administration Guide*.	No update
OEX: View My Charges	User can view the charges for the user's own activity.	No update
OEX: View My Profile Page	User can view the My Profile page. (Separate tasks control the user's access to functions within the page.)	No update
OEX: View My Company Negotiations	User can view details of negotiations created by user's company.	No update
OEX: View My Company Responses	User can view the bids, quotes, commitments, and counteroffers created by the user's company.	No update

Table D–6 Installed System Tasks for Oracle Exchange

System Task Name	Description	6.2.4 Status
OEX: View Negotiations	Users can view negotiation details. Users dealing with negotiations must have this task.	No update
OEX: View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.	No update
OEX: View Other Company Negotiations	User can view details of negotiations created by other companies.	No update
OEX: View Other Company Responses	User can view the bids, quotes, commitments, and counteroffers created by other companies.	No update
OEX: View Orders - Buyer	User can view history of own orders.	No update
View Orders - Manager	User can view the history of all orders of the company.	Deleted. Renamed to OEX: View Company’s Orders
OEX: View Orders - Supplier	User can view the history of orders placed with the user's company.	No update
OEX: View Price List	User can view the pricing for services	No update
OEX: View Product Development Page	User can view the Product Development tab. (Separate tasks control the user’s access to functions within the tab.)	No update
OEX: View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user’s access to functions within the tab.)	No update
OEX: View Registered Companies	User can view profile information for registered affiliate companies	No update
OEX: View Registered Users	User can view profile information for registered users in own company and in affiliate companies.	No update
OEX: View Responses	Users can view any response submitted by their company and any response submitted to the negotiations created by their company.	No update
OEX: View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.	No update

Table D–6 Installed System Tasks for Oracle Exchange

System Task Name	Description	6.2.4 Status
OEX: View Seller Negotiations Intelligence Reports	User can view negotiations intelligence reports for selling activity performed by the user's company.	No update
OEX: View Selling	User can view selling welcome page.	No update
OEX: View Sales Activities in Buyer Intelligence Reports	User can view awarded bids and committed offers summary reports, and selling activities in detail buyer negotiation intelligence reports.	No update
OEX: View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)	No update
OEX: View Subordinates’ Negotiations	User can view subordinates’ negotiations.	New/ Unassigned
OEX: View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.	No update
OEX: View Supplier Price Lists	User can View the details of any price lists created for the user’s company, including searching and reviewing individual price lines.	No update
OEX: View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user’s access to functions within the tab.)	No update
OEX: View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)	No update
OEX: View/Update Approval Controls	User can view and update Order Approval Controls for the user’s own company.	No update
OEX: View/Update Company Address Book	User can view and update the user's own company Address Book.	No update
OEX: View/Update Company Profile	User can view and update the user's own company profile.	No update
OEX: View/Update Data Mapping	User can view and update Data Mapping settings for the user's own company.	No update
OEX: View/Update Exchange Rates	User can view and update the currency conversion rates for the user's own company.	No update
OEX: View/Update Payment Method	User can view and update payment method information for the user's company.	No update

Table D–6 Installed System Tasks for Oracle Exchange

System Task Name	Description	6.2.4 Status
OEX: View/Update Personal Information	User can view and update own personal information	No update
OEX: View/Update Selling Preferences	User can view and update Selling Preferences for the user's own company	No update
OEX: View/Update Trading Partner Keywords	User can view and update trading partner keywords.	No update
OEX: View/Update Transaction Delivery	User can view and update Transaction Delivery settings for the user's own company.	No update
OEX: View/Update User Address Book	User can view and update their User Address Book.	No update
OEX: Withdraw from Trading Group	User can withdraw his or her company from a trading group.	No update*

* This system task was introduced in release 6.2.3.

Table D–7 Installed System Tasks for Oracle Supply Chain Exchange

System Task Name	Description	Status for 6.2.4
Base User	User can view Supply Chain Exchange menu.	No change
Order Pegging	User can view order pegging.	No change
Order Tracking	User can track Orders.	No change
Production Sequencing	User can view Production Sequences and Supply Chain Bills.	No change
Supply Chain Analysis	User can analyze Supply Chain performance.	No change
Supply Chain Bill Import	User can import Supply Chain Bills into Supply Chain Exchange.	No change
Supply Chain Collaboration Management	User can manage collaboration activities.	No change
Supply Chain Export	User can export data from Supply Chain Exchange.	No change
Supply Chain Import	User can import data into Supply Chain Exchange.	No change

Table D–7 Installed System Tasks for Oracle Supply Chain Exchange

System Task Name	Description	Status for 6.2.4
Supply Chain Inventory Management	User can perform Supply Chain Inventory management functions.	No change
Supply Chain User Preferences	User can manage user preferences.	No change
Supply Chain Workbench	User can view the Supply Chain Workbench including Bucketed Views as well as the Vertical listing views.	No change
View Exceptions	User can view Exceptions.	No change
View Plans	User can view plan information.	No change

Table D–8 Installed System Tasks for Oracle Transportation

System Task	Description	Status for 6.2.4
Administer Document Setup	User can set up and maintain document setup.	No change
Administer Lane Responsibilities	User can set up and maintain lane restriction rules.	No change
Administer Notification Routing Setup	User can set up and maintain rules routing notification rules.	No change
Bulk Loads	User can bulk load (lanes, schedules, price lists, zones,\ regions) and see the bulk load status.	No change
Catalog Pricing Estimates	User can do pricing estimate on the selected service lanes.	No change
Create or Edit Lane	User can define or edit Lanes.	No change
Create or Edit Load Zone	User can maintain zones	No change
Create or Edit Price Lists	User can maintain price lists	No change
Create or Edit Region	User can define or edit regions	No change
Create or Edit Schedule	User can define or edit schedules	No change

Table D–8 Installed System Tasks for Oracle Transportation

System Task	Description	Status for 6.2.4
Define or Edit Shipments	User can create new shipments and modify existing shipments created, tendered, and pending. User can view shipment history and details.	No change
Download Shipments	User can download the shipment.	No change
Download Templates	User can download templates	No change
Maintain Shipments Pickup Requests by Shipper	User (Shipper) can maintain shipment pickup requests	No change
Maintain SPR by Transportation Provider	User (Transportation Provider) can maintain shipment pickup requests	No change
Negotiation	User can define negotiations (RFQs, and auctions).	No change
Setup for Shipment Pickup Request Workflow - Carrier	User (carrier) can set up parameters for the Shipment Pickup Request Workflow.	No change
Setup for Shipment Pickup Request Workflow - Shipper	User (shipper) can set up parameters for the Shipment Pickup Request Workflow.	No change
Transportation Welcome Page	User can view the Transportation Welcome Page.	No change
Upload Shipments	User can upload shipments.	No change
View and Generate Documents	User can view and generate documents.	No change
View Orders	User can view orders, order details and history.	No change

Table D–9 Installed System Tasks for Oracle Product Development Exchange

System Task	Description	Status for 6.2.4
Bulk Load Catalog Structure	User can bulk load catalog structure.	No change
Bulk Load Items	User can bulk load items.	No change
Change Administration	Change Administration	No change

Table D–9 Installed System Tasks for Oracle Product Development Exchange

System Task	Description	Status for 6.2.4
Change Creation	User can create a change.	No change
Change Management	User can manage a change.	No change
Create or Edit extensible attributes	Create or edit extensible attributes.	No change
Document Creation	User can create a document.	No change
Document Management	User can manage a document.	No change
Engineering Intelligence	Engineering Intelligence.	No change
Group Administration	User can administer a group.	No change
Group Creation	User can create a group.	No change
Issue Creation	User can create an issue.	No change
Issue Management	User can manage an issue.	No change
Item Base Attributes Management	User can create and manage item base attributes.	No change
Item Category Management	User can create and manage item base attributes.	No change
Item Creation	User can create an item.	No change
Item Management	User can manage an item.	No change
Override Data Security	User can override data security.	No change
Product Planning	User can plan a product.	No change
Program Management	User can manage a program.	No change
Project Creation	User can create a project.	No change
Project Management	User can manage projects.	No change
Role Creation	User can create a role.	No change
Role Management	User can manage a role.	No change
View or Edit extensible attributes	View or edit extensible attributes.	No change

Table D–9 Installed System Tasks for Oracle Product Development Exchange

System Task	Description	Status for 6.2.4
View Role Description	User can view a role description	No change

Job Function/System Task Cross-Reference

The following table shows which system tasks are initially defined to which job functions. Note, however, that since the System Operator can customize a job function before granting it to a company, the exact job function definitions you see may be different.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Account Manager	OEX: Access To Do List	User can access personalized To Do List.
Oracle Exchange	Account Manager	OEX: Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Account Manager	OEX: Get Password Assistance	User can get password assistance.
Oracle Exchange	Account Manager	OEX: Register	User can register and check the status of the registration.
Oracle Exchange	Account Manager	OEX: View About Page	User can view the About page.
Oracle Exchange	Account Manager	OEX: View Admin Page	User can view the Admin tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	OEX: View All Charges	User can view the charges for the user's company activity.
Oracle Exchange	Account Manager	OEX: View Billing Activity	User can view billing activity, such as invoices, for the user's company if these are displayed on the system.
Oracle Exchange	Account Manager	OEX: View Billing Tab	User can view the Billing Tab.
Oracle Exchange	Account Manager	OEX: View Buyer Negotiations Intelligence Reports	User can view negotiations intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Account Manager	OEX: View Buying	User can view buying welcome page.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Account Manager	OEX: View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Exchange	Account Manager	OEX: View Catalog Purchases Intelligence Reports	User can view catalog purchases intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Account Manager	OEX: View Catalog Sales Intelligence Reports	User can view catalog sales intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Account Manager	OEX: View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	OEX: View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Account Manager	OEX: View Home Page	User can view the Home page.
Oracle Exchange	Account Manager	OEX: View Favorites List	User can view favorites list.
Oracle Exchange	Account Manager	OEX: View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	OEX: View My Company Negotiations	User can view details of negotiations created by user's company.
Oracle Exchange	Account Manager	OEX: View My Company Responses	User can view the bids, quotes, commitments, and counteroffers created by user's company."
Oracle Exchange	Account Manager	OEX: View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Account Manager	OEX: View Negotiations	Users can view negotiation details. Users dealing with negotiations must have this task.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Account Manager	OEX: View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Account Manager	OEX: View Company's Orders	User can view the history of all orders of the company.
Oracle Exchange	Account Manager	OEX: View Other Company Negotiations	User can view details of negotiations created by other companies.
Oracle Exchange	Account Manager	OEX: View Other Company Responses	User can view bids, quotes, commitments, and counteroffers created by other companies.
Oracle Exchange	Account Manager	OEX: View Price List	User can view the pricing for services.
Oracle Exchange	Account Manager	OEX: View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	OEX: View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	OEX: View Responses	Users can view any response submitted by their company and any response submitted to the negotiations created by their company.
Oracle Exchange	Account Manager	OEX: View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	OEX: View Seller Negotiations Intelligence Reports	User can view negotiations intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Account Manager	OEX: View Selling	User can view selling welcome page.
Oracle Exchange	Account Manager	OEX: View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Account Manager	OEX: View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	OEX: View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	OEX: View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Account Manager	OEX: View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Account Manager	OEX: View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Buyer	OEX: Receive Orders	User can acknowledge receipt of items the user ordered.
Oracle Exchange	Buyer	OEX: Accept or Reject Order Cancellation or Change Requests	User can accept or reject the order cancellation or change requests.
Oracle Exchange	Buyer	OEX: Access Threaded Discussions	User can access threaded discussions.
Oracle Exchange	Buyer	OEX: Access To Do List	User can access personalized To Do List.
Oracle Exchange	Buyer	OEX: Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Buyer	OEX: Cancel or Request Order Cancellation	User can cancel or request for order cancellation.
Oracle Exchange	Buyer	OEX: Change Order	User can change order.
Oracle Exchange	Buyer	OEX: Check Availability	User can check item availability while shopping.
Oracle Exchange	Buyer	OEX: Create Add-to-Cart Order	User can create a purchase order for items selected from the catalog.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buyer	OEX: Create Buyer's Negotiation	Users can create buyer's negotiations, private templates and invitation lists. They can also copy, unlock, unseal, cancel and award the negotiations they have created.
Oracle Exchange	Buyer	OEX: Create Event	Users can create negotiation events. They can also cancel any negotiation events they created.
Oracle Exchange	Buyer	OEX: Get Password Assistance	User can get password assistance.
Oracle Exchange	Buyer	OEX: Manage Customer Group	User can create customer groups and administer the membership of customer groups.
Oracle Exchange	Buyer	OEX: Manage Regional Addresses	User can view and update current assignments to company regional addresses.
Oracle Exchange	Buyer	OEX: Punch Out to Supplier Sites	User can link to supplier sites, shop, and bring back a purchase order from that site to the system.
Oracle Exchange	Buyer	OEX: Register	User can register and check the status of the registration.
Oracle Exchange	Buyer	OEX: Respond to Seller's Negotiation	As a buyer, a user can respond to any seller's negotiation.
Oracle Exchange	Buyer	OEX: View About Page	User can view the About page.
Oracle Exchange	Buyer	OEX: View All Items	User can search and review all catalog items. (Separate tasks control whether the user can purchase the items.)
Oracle Exchange	Buyer	OEX: View Buyer Negotiations Intelligence Reports	User can view negotiations intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Buyer	OEX: View Buying	User can view buying welcome page.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buyer	OEX: View Buying Link	User can view the Buying Link. (Separate tasks control the user’s access to functions within the buying application.)
Oracle Exchange	Buyer	OEX: View Catalog Purchases Intelligence Reports	User can view catalog purchases intelligence reports for buying activity performed by the user’s company.
Oracle Exchange	Buyer	OEX: View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user’s access to functions within the tab.)
Oracle Exchange	Buyer	OEX: View Checkout Button and Messages	User can view the Checkout button and all related messages in the shopping cart.
Oracle Exchange	Buyer	OEX: View Company Information	User can access the View Company Information page to view the user’s company information.
Oracle Exchange	Buyer	OEX: View Events	Users can view details of any event created by their company.
Oracle Exchange	Buyer	OEX: View Favorites List	User can view favorites list.
Oracle Exchange	Buyer	OEX: View Home Page	User can view the Home page.
Oracle Exchange	Buyer	OEX: View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user’s access to functions within the tab.)
Oracle Exchange	Buyer	OEX: View My Charges	User can view the charges for the user’s own activity.
Oracle Exchange	Buyer	OEX: View My Company Negotiations	User can view details of negotiations created by user’s company.
Oracle Exchange	Buyer	OEX: View My Company Responses	User can view the bids, quotes, commitments, and counteroffers created by user’s company.
Oracle Exchange	Buyer	OEX: View My Profile Page	User can view the My Profile Page. (Separate tasks control the user’s access to functions within the page.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buyer	OEX: View Negotiations	Users can view negotiation details. Users dealing with negotiations must have this task.
Oracle Exchange	Buyer	OEX: View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Buyer	OEX: View Orders - Buyer	User can view history of own orders.
Oracle Exchange	Buyer	OEX: View Other Company Negotiations	User can view details of negotiations created by other companies.
Oracle Exchange	Buyer	OEX: View Other Company Responses	User can view bids, quotes, commitments, and counteroffers created by other companies.
Oracle Exchange	Buyer	OEX: View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer	OEX: View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer	OEX: View Responses	Users can view any response submitted by their company and any response submitted to the negotiations created by their company.
Oracle Exchange	Buyer	OEX: View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer	OEX: View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer	OEX: View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buyer	OEX: View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer	OEX: View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Buyer	OEX: View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Accept or Reject Order Cancellation or Change Requests	User can accept or reject the order cancellation or change requests.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Access Threaded Discussions	User can access threaded discussions.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Access To Do List	User can access personalized To Do List.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Cancel or Request Order Cancellation	User can cancel or request for order cancellation.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Change Order	User can change order.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Check Availability	User can check item availability while shopping.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Create Add-to-Cart Order	User can create a purchase order for items selected from the catalog.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Create Buyer's Negotiation	User can create buyer's negotiations, private templates and invitation lists. User can copy, unlock, unseal, cancel and award user's own negotiations.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Create Event	Users can create negotiation events. They can also cancel any negotiation events they created.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Get Password Assistance	User can get password assistance.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Manage Regional Addresses	User can view and update current assignments to company regional addresses.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Punch Out to Supplier Sites	User can link to supplier sites, shop, and bring back a purchase order from that site to the system.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Receive Orders	User can acknowledge receipt of items the user ordered.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Register	User can register and check the status of the registration.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: Respond to Seller's Negotiation	As a buyer, a user can respond to any seller's negotiation.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View About Page	User can view the About page.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Buyer Negotiations Intelligence Reports	User can view negotiations intelligence reports for buying activity performed by the user's company.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Buying	User can view buying welcome page.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Catalog Purchases Intelligence Reports	User can view catalog purchases intelligence reports for buying activity performed by the user's company.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Checkout Button and Messages	User can view the Checkout button and all related messages in the shopping cart.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Events	User can view details of any event created by their company.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Favorites List	User can view favorite list.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Home Page	User can view the Home page.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Items with Preferred Pricing	When shopping, user sees buyer-specific prices if both list and buyer-specific prices are provided. If both buyer-specific and group prices are provided, the user sees both.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View My Charges	User can view the charges for the user's own activity.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View My Company Negotiations	User can view details of negotiations created by user's company
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View My Company Responses	User can view the bids, quotes, commitments, and counteroffers created by user's company.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Orders - Buyer	User can view history of own orders.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Other Company Negotiations	User can view details of negotiations created by other companies.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Other Company Responses	User can view bids, quotes, commitments, and counteroffers created by other companies.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Sales Activity in Buyer Intelligence Reports	User can view awarded bids and committed offers summary reports and selling activities in detail buyer negotiation intelligence reports.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	OEX: Buyer with Preferred Pricing View	OEX: View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: Access To Do List	User can access personalized To Do List.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: Cancel or Request Order Cancellation	User can cancel or request for order cancellation.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buyer with Restricted Pricing View	OEX: Check Availability	User can check item availability while shopping.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: Create Add-to-Cart Order	User can create a purchase order for items selected from the catalog.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: Get Password Assistance	User can get password assistance.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: Register	User can register and check the status of the registration.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View About Page	User can view the About page.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Buying	User can view buying welcome page.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Checkout Button and Messages	User can view the Checkout button and all related messages in the shopping cart.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Home Page	User can view the Home page.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Items with Buyer-Specific Pricing	User can search and review only those catalog items with buyer-specific pricing. (Separate tasks control whether the user can purchase the items.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View My Charges	User can view the charges for the user's own activity.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Orders - Buyer	User can view history of own orders.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Buyer with Restricted Pricing View	OEX: View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Buying Professional	OEX: Receive Orders	User can acknowledge receipt of items the user ordered.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buying Professional	OEX: Access To Do List	User can access personalized To Do List.
Oracle Exchange	Buying Professional	OEX: Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Buying Professional	OEX: Check Availability	User can check item availability while shopping.
Oracle Exchange	Buying Professional	OEX: Create Add-to-Cart Order	User can create a purchase order for items selected from the catalog.
Oracle Exchange	Buying Professional	OEX: Create Buyer's Negotiation	Users can create buyer's negotiations, private templates and invitation lists. They can also copy, unlock, unseal, cancel and award the negotiations they have created.
Oracle Exchange	Buying Professional	OEX: Create Event	Users can create negotiation events. They can also cancel any negotiation events they created.
Oracle Exchange	Buying Professional	OEX: Export Supplier Catalogs	User can export supplier catalogs.
Oracle Exchange	Buying Professional	OEX: Get Password Assistance	User can get password assistance.
Oracle Exchange	Buying Professional	OEX: Manage Regional Addresses	User can view and update current assignments to company regional addresses.
Oracle Exchange	Buying Professional	OEX: Punch Out to Supplier Sites	User can link to supplier sites, shop, and bring back a purchase order from that site to the system.
Oracle Exchange	Buying Professional	OEX: Register	User can register and check the status of the registration.
Oracle Exchange	Buying Professional	OEX: Respond to Seller's Negotiation	As a buyer, a user can respond to any seller's negotiation.
Oracle Exchange	Buying Professional	OEX: View About Page	User can view the About page.
Oracle Exchange	Buying Professional	OEX: View All Items	User can search and review all catalog items. (Separate tasks control whether the user can purchase the items.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buying Professional	OEX: View Buyer Negotiations Intelligence Reports	User can view negotiations intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Buying Professional	OEX: View Buying	User can view buying welcome page.
Oracle Exchange	Buying Professional	OEX: View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Exchange	Buying Professional	OEX: View Catalog Purchases Intelligence Reports	User can view catalog purchases intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Buying Professional	OEX: View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	OEX: View Checkout Button and Messages	User can view the Checkout button and all related messages in the shopping cart.
Oracle Exchange	Buying Professional	OEX: View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Buying Professional	OEX: View Events	Users can view details of any event created by their company.
Oracle Exchange	Buying Professional	OEX: View Home Page	User can view the Home page.
Oracle Exchange	Buying Professional	OEX: View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	OEX: View My Charges	User can view the charges for the user's own activity.
Oracle Exchange	Buying Professional	OEX: View My Company Negotiations	User can view details of negotiations created by user's company.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buying Professional	OEX: View My Company Responses	User can view the bids, quotes, commitments, and counteroffers created by user's company.
Oracle Exchange	Buying Professional	OEX: View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Buying Professional	OEX: View Negotiations	Users can view negotiation details. Users dealing with negotiations must have this task.
Oracle Exchange	Buying Professional	OEX: View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Buying Professional	OEX: View Orders - Buyer	User can view history of own orders.
Oracle Exchange	Buying Professional	OEX: View Other Company Negotiations	User can view details of negotiations created by other companies.
Oracle Exchange	Buying Professional	OEX: View Other Company Responses	User can view bids, quotes, commitments, and counteroffers created by other companies.
Oracle Exchange	Buying Professional	OEX: View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	OEX: View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	OEX: View Responses	Users can view any response submitted by their company and any response submitted to the negotiations created by their company.
Oracle Exchange	Buying Professional	OEX: View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Buying Professional	OEX: View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	OEX: View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	OEX: View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Buying Professional	OEX: View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Buying Professional	OEX: View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Catalog Author	OEX: Access To Do List	User can access personalized To Do List.
Oracle Exchange	Catalog Author	OEX: Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - Add and Update Item Online	User can add and update items online.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - Add and Update Pricing Online	User can add and update pricing online.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - Bulk Load Catalog	User can bulk load catalog data.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - Configure Catalog Punchout	User can configure catalog punchout.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - Configure Item Availability	User can configure item availability.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - Control Buyer Catalog Exports	User can control buyer catalog exports.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Catalog Author	OEX: Catalog Authoring- Catalog Deletion	User can perform mass deletion of catalogs or items using the online catalog deletion feature.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - Control Catalog Load	User can control catalog load.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - Delete Item Online	User can delete items online.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - Delete Pricing Online	User can delete pricing online.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - Export My Catalog	User can export my catalog.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - Image Load	User can load image.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - Manage Third Party Authoring	User can manage third party authoring.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - Review and Publish Bulk Load Jobs	User can review and publish bulk load jobs.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - View Catalog Resources	User can view catalog resources.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - View Item	User can view items.
Oracle Exchange	Catalog Author	OEX: Catalog Authoring - View Pricing	User can view pricing.
Oracle Exchange	Catalog Author	OEX: Get Password Assistance	User can get password assistance.
Oracle Exchange	Catalog Author	OEX: Manage Customer Group	User can create customer groups and administer the membership of customer groups.
Oracle Exchange	Catalog Author	OEX: Register	User can register and check the status of the registration.
Oracle Exchange	Catalog Author	OEX: Review Group Membership	User can review a list of trading groups to which his or her company belongs.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Catalog Author	OEX: View About Page	User can view the About page.
Oracle Exchange	Catalog Author	OEX: View Catalog Sales Intelligence Reports	User can view catalog sales intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Catalog Author	OEX: View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	OEX: View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Catalog Author	OEX: View Home Page	User can view the Home page.
Oracle Exchange	Catalog Author	OEX: View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	OEX: View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Catalog Author	OEX: View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Catalog Author	OEX: View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	OEX: View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	OEX: View Seller Negotiations Intelligence Reports	User can view negotiations intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Catalog Author	OEX: View Selling	User can view selling welcome page.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Catalog Author	OEX: View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)
Oracle Exchange	Catalog Author	OEX: View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	OEX: View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	OEX: View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Catalog Author	OEX: View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Catalog Author	OEX: View/Update Trading Partner Keywords	User can view and update trading partner keywords.
Oracle Exchange	Catalog Author	OEX: View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Catalog Author	OEX: Withdraw from Trading Group	User can withdraw his or her company from a trading group.
Oracle Exchange	Company Administrator	OEX: Access To Do List	User can access personalized To Do List.
Oracle Exchange	Company Administrator	OEX: Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Company Administrator	OEX: Add Invitees to Open Negotiations	Users can add invitees to any in-progress negotiation created by their company.
Oracle Exchange	Company Administrator	OEX: Administer for Affiliate Companies	User can perform administrative tasks (in the Admin tab) for affiliate companies.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Company Administrator	OEX: Administer Registration	User can approve registration of other users in the company and of affiliate companies, assign job functions to the users, delegate job functions to the affiliate companies, and customize job functions.
Oracle Exchange	Company Administrator	OEX: Award Negotiations	User can make an award decision for any negotiation created by their company.
Oracle Exchange	Company Administrator	OEX: Bulk Load Users and Companies	User can access the bulk loading functionality to create or update users and affiliate companies.
Oracle Exchange	Company Administrator	OEX: Cancel Event	Users can cancel any negotiation event created by their company.
Oracle Exchange	Company Administrator	OEX: Cancel Negotiations	Users can cancel any negotiation created by their company.
Oracle Exchange	Company Administrator	OEX: Change Negotiations' Close Date	Users can change the close date of any negotiation created by their company.
Oracle Exchange	Company Administrator	OEX: Create Minimum Sales Order Amount	User can create new Minimum Sales Order Amount.
Oracle Exchange	Company Administrator	OEX: Define Custom Purchase Order Templates	User can define custom purchase order templates for the user's company and affiliate companies.
Oracle Exchange	Company Administrator	OEX: Disqualify Responses	Users can disqualify responses submitted to any negotiation created by their company.
Oracle Exchange	Company Administrator	OEX: Disqualify Invitees	Users can disqualify or reactivate respondents from any in-progress auctions or RFQs that they can access.
Oracle Exchange	Company Administrator	OEX: Edit Business Regions	User can create and edit Business Regions for the company.
Oracle Exchange	Company Administrator	OEX: Get Password Assistance	User can get password assistance.
Oracle Exchange	Company Administrator	OEX: Log On	User can access the Log On page.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Company Administrator	OEX: Manage Attribute Lists	Users can manage attribute lists for the entire company.
Oracle Exchange	Company Administrator	OEX: Manage Bidders Lists	"Users can manage both public and private invitation lists. If not authorized with this function, they can create and manage only their own private invitation lists."
Oracle Exchange	Company Administrator	OEX: Manage Draft Negotiations	"User can edit, delete, and publish draft negotiations."
Oracle Exchange	Company Administrator	OEX: Manage Negotiation Templates	"Users can manage both public and private negotiation templates. If not authorized with this function, users can create and manage only their own private templates."
Oracle Exchange	Company Administrator	OEX: Register	User can register and check the status of the registration.
Oracle Exchange	Company Administrator	OEX: Review Group Membership	User can review a list of trading groups to which his or her company belongs.
Oracle Exchange	Company Administrator	OEX: Set Browsing Preference	User can customize the category browsing tree for the entire company.
Oracle Exchange	Company Administrator	OEX: Unlock Draft Negotiations	User can unlock draft negotiations.
Oracle Exchange	Company Administrator	OEX: Unlock Sealed Negotiations	Users can unlock any sealed negotiation created by their company.
Oracle Exchange	Company Administrator	OEX: Unseal Sealed Negotiations	Users can unseal any sealed negotiation created by their company.
Oracle Exchange	Company Administrator	OEX: View About Page	User can view the About page.
Oracle Exchange	Company Administrator	OEX: View Admin Page	User can view the Admin tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	OEX: View Billing Tab	User can view the Billing Tab.
Oracle Exchange	Company Administrator	OEX: View Buying	User can view buying welcome page.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Company Administrator	OEX: View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Exchange	Company Administrator	OEX: View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	OEX: View Company Administration Guide	User can view Company Administration Guide
Oracle Exchange	Company Administrator	OEX: View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Company Administrator	OEX: View Events	Users can view details of any event created by their company.
Oracle Exchange	Company Administrator	OEX: View Home Page	User can view the Home page.
Oracle Exchange	Company Administrator	OEX: View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	OEX: View My Company Negotiations	User can view details of negotiations created by user's company.
Oracle Exchange	Company Administrator	OEX: View My Company Responses	"User can view the bids, quotes, commitments, and counteroffers created by user's company."
Oracle Exchange	Company Administrator	OEX: View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Company Administrator	OEX: View Negotiations	Users can view negotiation details. Users dealing with negotiations must have this task.
Oracle Exchange	Company Administrator	OEX: View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Company Administrator	OEX: View Other Company Negotiations	User can view details of negotiations created by other companies.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Company Administrator	OEX: View Other Company Responses	"User can view bids, quotes, commitments, and counteroffers created by other companies."
Oracle Exchange	Company Administrator	OEX: View Price List	User can view the pricing for services.
Oracle Exchange	Company Administrator	OEX: View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	OEX: View Registered Companies	User can view profile information for registered affiliate companies.
Oracle Exchange	Company Administrator	OEX: View Registered Users	User can view profile information for registered users in own company and in affiliate companies.
Oracle Exchange	Company Administrator	OEX: View Responses	Users can view any response submitted by their company and any response submitted to the negotiations created by their company.
Oracle Exchange	Company Administrator	OEX: View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	OEX: View Selling	User can view selling welcome page.
Oracle Exchange	Company Administrator	OEX: View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)
Oracle Exchange	Company Administrator	OEX: View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	OEX: View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Company Administrator	OEX: View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Company Administrator	OEX: View/Update Approval Controls	User can view and update Order Approval Controls for the user's own company.
Oracle Exchange	Company Administrator	OEX: View/Update Company Address Book	User can view and update the user's own company Address Book.
Oracle Exchange	Company Administrator	OEX: View/Update Company Profile	User can view and update the user's own company profile.
Oracle Exchange	Company Administrator	OEX: View/Update Data Mapping	User can view and update Data Mapping settings for the user's own company.
Oracle Exchange	Company Administrator	OEX: View/Update Exchange Rates	User can view and update the currency conversion rates for the user's own company.
Oracle Exchange	Company Administrator	OEX: View/Update Payment Method	User can view and update payment method information for the user's company.
Oracle Exchange	Company Administrator	OEX: View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Company Administrator	OEX: View/Update Selling Preferences	User can view and update Selling Preferences for the user's own company.
Oracle Exchange	Company Administrator	OEX: View/Update Trading Partner Keywords	User can view and update trading partner keywords.
Oracle Exchange	Company Administrator	OEX: View/Update Transaction Delivery	User can view and update Transaction Delivery settings for the user's own company.
Oracle Exchange	Company Administrator	OEX: View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Company Administrator	OEX: Withdraw from Trading Group	User can withdraw his or her company from a trading group.
Oracle Exchange	Dummy Responsibility	OEX: Catalog Authoring - Manage Catalog Files	User can manage catalog files.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Dummy Responsibility	OEX: Download Supplier-Defined Catalogs	User can download supplier-defined catalogs.
Oracle Exchange	Dummy Responsibility	OEX: View Subordinates’ Negotiations	User can view subordinates’ negotiations.
Oracle Exchange	Dummy Responsibility	OEX: View Direct Subordinates Orders	User can review a list of trading groups to which his or her company belongs.
Oracle Exchange	Dummy Responsibility	OEX: Reassign Work	User can reassign orders, negotiations, and notifications to another user.
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: Access To Do List	User can access personalized to do list.
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: Get Password Assistance	User can get password assistance.
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: Manage Trading Group	User can create trading groups, administer the membership of trading groups, and manage prices assigned to trading groups.
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: View About Page	User can view the About page.
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: View Admin Page	User can view the Admin tab. (Separate tasks control the user’s access to functions within the tab.)
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: View Buying	User can view buying welcome page.
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEK: View Buying Link	User can view the buying link. (Separate tasks control the user’s access to functions within the buying application.)
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: View Company Information	User can access the View Company Information page to view the user’s company information.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: View Favorites List	User can view favorites list.
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: View Home Page	User can view the home page.
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions in the page.)
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: View Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Group Operator (Manage Purchasing Group)	OEX: Manage Trading Group	User can create trading groups, administer the membership of trading groups, and manage prices assigned to trading groups.
Oracle Exchange	Purchasing Manager	OEX: Access To Do List	User can access personalized To Do List.
Oracle Exchange	Purchasing Manager	OEX: Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Purchasing Manager	OEX: Control Pricing Approval	User can set up pricing approval rules for pricing changes submitted by suppliers.
Oracle Exchange	Purchasing Manager	OEX: Export Supplier Catalogs	User can export supplier catalogs.
Oracle Exchange	Purchasing Manager	OEX: Get Password Assistance	User can get password assistance.
Oracle Exchange	Purchasing Manager	OEX: Manage Punchout Access	User can control which supplier punchouts are visible.
Oracle Exchange	Purchasing Manager	OEX: Register	User can register and check the status of the registration.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Purchasing Manager	OEX: Review and Approve Price Changes	User can approve or reject pricing changes submitted by suppliers.
Oracle Exchange	Purchasing Manager	OEX: Review Group Membership	User can review a list of trading groups to which his or her company belongs.
Oracle Exchange	Purchasing Manager	OEX: View About Page	User can view the About page.
Oracle Exchange	Purchasing Manager	OEX: View Admin Page	User can view the Admin tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	OEX: View Billing Tab	User can view the Billing Tab.
Oracle Exchange	Purchasing Manager	OEX: View Buyer Negotiations Intelligence Reports	User can view negotiations intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Purchasing Manager	OEX: View Buying	User can view buying welcome page.
Oracle Exchange	Purchasing Manager	OEX: View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)
Oracle Exchange	Purchasing Manager	OEX: View Catalog Purchases Intelligence Reports	User can view catalog purchases intelligence reports for buying activity performed by the user's company.
Oracle Exchange	Purchasing Manager	OEX: View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	OEX: View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Purchasing Manager	OEX: View Favorites List	User can view favorites list.
Oracle Exchange	Purchasing Manager	OEX: View Home Page	User can view the Home page.
Oracle Exchange	Purchasing Manager	OEX: View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Purchasing Manager	OEX: View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Purchasing Manager	OEX: View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Purchasing Manager	OEX: View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	OEX: View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	OEX: View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	OEX: View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	OEX: View Supplier Price Lists	"User can View the details of any price lists created for the user's company, including searching and reviewing individual price lines."
Oracle Exchange	Purchasing Manager	OEX: View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	OEX: View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Purchasing Manager	OEX: View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Purchasing Manager	OEX: View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Seller	OEX: Accept or Reject Order Cancellation or Change Requests	User can accept or reject the order cancellation or change requests.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Seller	OEX: Access Threaded Discussions	User can access threaded discussions.
Oracle Exchange	Seller	OEX: Access To Do List	User can access personalized To Do List.
Oracle Exchange	Seller	OEX: Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Seller	OEX: Acknowledge Orders	User can acknowledge orders placed with the user's company.
Oracle Exchange	Seller	OEX: Cancel or Request Order Cancellation	User can cancel or request for order cancellation.
Oracle Exchange	Seller	OEX: Change Order	User can change order.
Oracle Exchange	Seller	OEX: Create Event	Users can create negotiation events. They can also cancel any negotiation events they created.
Oracle Exchange	Seller	OEX: Create Minimum Sales Order Amount	User can create new Minimum Sales Order Amount.
Oracle Exchange	Seller	OEX: Create Seller's Negotiation	"Users can create seller's negotiations and publish them to buyers. They can create private templates, invitation lists and also copy, unlock, unseal, cancel and award the negotiations they have created."
Oracle Exchange	Seller	OEX: Get Password Assistance	User can get password assistance.
Oracle Exchange	Seller	OEX: Manage Regional Addresses	User can view and update current assignments to company regional addresses.
Oracle Exchange	Seller	OEX: Register	User can register and check the status of the registration.
Oracle Exchange	Seller	OEX: Respond to Buyer's Negotiation	"As a seller, a user can respond to any buyer's negotiation."
Oracle Exchange	Seller	OEX: View About Page	User can view the About page.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Seller	OEX: View Catalog Sales Intelligence Reports	User can view catalog sales intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Seller	OEX: View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	OEX: View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Seller	OEX: View Events	Users can view details of any event created by their company.
Oracle Exchange	Seller	OEX: View Home Page	User can view the Home page.
Oracle Exchange	Seller	OEX: View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	OEX: View My Charges	User can view the charges for the user's own activity.
Oracle Exchange	Seller	OEX: View My Company Negotiations	User can view details of negotiations created by user's company.
Oracle Exchange	Seller	OEX: View My Company Responses	"User can view the bids, quotes, commitments, and counteroffers created by user's company."
Oracle Exchange	Seller	OEX: View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Seller	OEX: View Negotiations	Users can view negotiation details. Users dealing with negotiations must have this task.
Oracle Exchange	Seller	OEX: View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Seller	OEX: View Orders - Supplier	User can view the history of orders placed with the user's company.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Seller	OEX: View Other Company Negotiations	User can view details of negotiations created by other companies.
Oracle Exchange	Seller	OEX: View Other Company Responses	"User can view bids, quotes, commitments, and counteroffers created by other companies."
Oracle Exchange	Seller	OEX: View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	OEX: View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	OEX: View Responses	Users can view any response submitted by their company and any response submitted to the negotiations created by their company.
Oracle Exchange	Seller	OEX: View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	OEX: View Seller Negotiations Intelligence Reports	User can view negotiations intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Seller	OEX: View Selling	User can view selling welcome page.
Oracle Exchange	Seller	OEX: View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)
Oracle Exchange	Seller	OEX: View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	OEX: View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Seller	OEX: View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Seller	OEX: View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Seller	OEX: View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Third Party Catalog Author	OEX: Access To Do List	User can access personalized To Do List.
Oracle Exchange	Third Party Catalog Author	OEX: Access Trading Partner Directory	User can access the Trading Partner Directory.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - Add and Update Item Online	User can add and update items online.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - Add and Update Pricing Online	User can add and update pricing online.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - Bulk Load Catalog	User can bulk load catalog data.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - Configure Item Availability	User can configure item availability.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - Control Buyer Catalog Exports	User can control buyer catalog exports.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring-Catalog Deletion	User can perform mass deletion of catalog or items using the online catalog deletion feature.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - Control Catalog Load	User can control catalog load.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - Delete Item Online	User can delete items online.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - Delete Pricing Online	User can delete pricing online.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - Export My Catalog	User can export my catalog.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - Image Load	User can load image.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - Manage Third Party Authoring	User can manage third party authoring.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - Perform Third Party Authoring	User can perform third party authoring.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - Review and Publish Bulk Load Jobs	User can review and publish bulk load jobs.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - View Catalog Resources	User can view catalog resources.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - View Item	User can view items.
Oracle Exchange	Third Party Catalog Author	OEX: Catalog Authoring - View Pricing	User can view pricing.
Oracle Exchange	Third Party Catalog Author	OEX: Get Password Assistance	User can get password assistance.
Oracle Exchange	Third Party Catalog Author	OEX: Manage Customer Group	User can create customer groups and administer the membership of customer groups.
Oracle Exchange	Third Party Catalog Author	OEX: Register	User can register and check the status of the registration.
Oracle Exchange	Third Party Catalog Author	OEX: View About Page	User can view the About page.
Oracle Exchange	Third Party Catalog Author	OEX: View Catalog Sales Intelligence Reports	User can view catalog sales intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Third Party Catalog Author	OEX: View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Third Party Catalog Author	OEX: View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Exchange	Third Party Catalog Author	OEX: View Home Page	User can view the Home page.
Oracle Exchange	Third Party Catalog Author	OEX: View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	OEX: View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Exchange	Third Party Catalog Author	OEX: View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Third Party Catalog Author	OEX: View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	OEX: View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	OEX: View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	OEX: View Seller Negotiations Intelligence Reports	User can view negotiations intelligence reports for selling activity performed by the user's company.
Oracle Exchange	Third Party Catalog Author	OEX: View Selling	User can view selling welcome page.
Oracle Exchange	Third Party Catalog Author	OEX: View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Third Party Catalog Author	OEX: View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	OEX: View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	OEX: View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Third Party Catalog Author	OEX: View/Update Personal Information	User can view and update own personal information.
Oracle Exchange	Third Party Catalog Author	OEX: View/Update Trading Partner Keywords	User can view and update trading partner keywords.
Oracle Exchange	Third Party Catalog Author	OEX: View/Update User Address Book	User can view and update their User Address Book.
Oracle Exchange	Transaction Manager	OEX: Receive XML Failure Messages	Receive e-mail and notification messages in the event of a failure of an XML message.
Oracle Exchange	Transaction Manager	OEX: Receive XML Success Messages	Receive e-mail and notification messages in the event of a success of an XML message.
Oracle Exchange	Transaction Manager	OEX: Test Inbound Transactions	User can test the inbound transaction of XML documents.
Oracle Exchange	Unknown User	OEX: Get Password Assistance	User can get password assistance.
Oracle Exchange	Unknown User	OEX: Log On	User can access the Log On page.
Oracle Exchange	Unknown User	OEX: Register	User can register and check the status of the registration.
Oracle Exchange	Unknown User	OEX: View About Page	User can view the About page.
Oracle Exchange	Unknown User	OEX: View Buying Link	User can view the Buying Link. (Separate tasks control the user's access to functions within the buying application.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Exchange	Unknown User	OEX: View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Unknown User	OEX: View Home Page	User can view the Home page.
Oracle Exchange	Unknown User	OEX: View Intelligence Page	User can view the Intelligence tab in the Buying and Selling applications. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Unknown User	OEX:View Negotiations Page	User can view the Negotiations tab as part of Tab Header. Note that separate tasks control users' access to functions within the tab.
Oracle Exchange	Unknown User	OEX:View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Unknown User	OEX:View Purchases Tab	User can view the Purchases tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Unknown User	OEX:View Sales Tab	User can view the Sales tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Unknown User	OEX:View Selling Link	User can view the Selling Link. (Separate tasks control the user's access to functions within the selling application.)
Oracle Exchange	Unknown User	OEX:View Shopping Page	User can view the Shopping tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Unknown User	OEX:View Supply Chain Page	User can view the Supply Chain tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Exchange	Unknown User	OEX: View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)

Table D–10   Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Product Development Exchange	Extensible Attribute Administrator	Create or Edit extensible attributes	Create or Edit extensible attributes
Oracle Product Development Exchange	Extensible Attribute Administrator	View or Edit extensible attributes	View or Edit extensible attributes
Oracle Product Development Exchange	Product Development Administrator	Access To Do List	User can access personalized To Do List.
Oracle Product Development Exchange	Product Development Administrator	Bulk Load Catalog Structure	User can bulk load catalog structure
Oracle Product Development Exchange	Product Development Administrator	Bulk Load Items	User can bulk load items
Oracle Product Development Exchange	Product Development Administrator	Change Administration	Change Administration
Oracle Product Development Exchange	Product Development Administrator	Change Creation	User can create a change
Oracle Product Development Exchange	Product Development Administrator	Change Management	User can manage a change
Oracle Product Development Exchange	Product Development Administrator	Create or Edit extensible attributes	Create or Edit extensible attributes
Oracle Product Development Exchange	Product Development Administrator	Document Creation	User can create a document
Oracle Product Development Exchange	Product Development Administrator	Document Management	User can manage a document
Oracle Product Development Exchange	Product Development Administrator	Engineering Intelligence	Engineering Intelligence

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Product Development Exchange	Product Development Administrator	Get Password Assistance	User can get password assistance.
Oracle Product Development Exchange	Product Development Administrator	Group Creation	User can create a group
Oracle Product Development Exchange	Product Development Administrator	Issue Creation	User can create an issue
Oracle Product Development Exchange	Product Development Administrator	Issue Management	User can manage an issue
Oracle Product Development Exchange	Product Development Administrator	Item Base Attributes Management	User can create and manage item base attributes
Oracle Product Development Exchange	Product Development Administrator	Item Category Management	User can create and manage catalog category
Oracle Product Development Exchange	Product Development Administrator	Item Creation	User can create an item
Oracle Product Development Exchange	Product Development Administrator	Item Management	User can manage an item
Oracle Product Development Exchange	Product Development Administrator	Log On	User can access the Log On page.
Oracle Product Development Exchange	Product Development Administrator	Manage Group	Manage Group
Oracle Product Development Exchange	Product Development Administrator	Product Planning	User can plan a product
Oracle Product Development Exchange	Product Development Administrator	Program Management	User can manage a program

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Product Development Exchange	Product Development Administrator	Project Creation	User can create a project.
Oracle Product Development Exchange	Product Development Administrator	Project Management	User can manage projects.
Oracle Product Development Exchange	Product Development Administrator	Register	User can register and check the status of the registration.
Oracle Product Development Exchange	Product Development Administrator	Role Creation	User can create a role
Oracle Product Development Exchange	Product Development Administrator	Role Management	User can manage a role
Oracle Product Development Exchange	Product Development Administrator	View About Page	User can view the About page.
Oracle Product Development Exchange	Product Development Administrator	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Product Development Exchange	Product Development Administrator	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Product Development Exchange	Product Development Administrator	View Home Page	User can view the Home page.
Oracle Product Development Exchange	Product Development Administrator	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Product Development Exchange	Product Development Administrator	View or Edit extensible attributes	View or Edit extensible attributes
Oracle Product Development Exchange	Product Development Administrator	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Product Development Exchange	Product Development Administrator	View Role Description	User can view Role Description
Oracle Product Development Exchange	Product Development Administrator	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Product Development Exchange	Product Development Administrator	View Welcome Tab	User can view Welcome Tab
Oracle Product Development Exchange	Product Development Administrator	View/Update Personal Information	User can view and update own personal information.
Oracle Product Development Exchange	Product Development Administrator	View/Update User Address Book	User can view and update their User Address Book.
Oracle Product Development Exchange	Product Development User	Access To Do List	User can access personalized To Do List.
Oracle Product Development Exchange	Product Development User	Change Creation	User can create a change
Oracle Product Development Exchange	Product Development User	Change Management	User can manage a change
Oracle Product Development Exchange	Product Development User	Document Creation	User can create a document
Oracle Product Development Exchange	Product Development User	Document Management	User can manage a document
Oracle Product Development Exchange	Product Development User	Engineering Intelligence	Engineering Intelligence
Oracle Product Development Exchange	Product Development User	Get Password Assistance	User can get password assistance.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Product Development Exchange	Product Development User	Group Creation	User can create a group
Oracle Product Development Exchange	Product Development User	Issue Creation	User can create an issue
Oracle Product Development Exchange	Product Development User	Issue Management	User can manage an issue
Oracle Product Development Exchange	Product Development User	Item Creation	User can create an item
Oracle Product Development Exchange	Product Development User	Item Management	User can manage an item
Oracle Product Development Exchange	Product Development User	Log On	User can access the Log On page.
Oracle Product Development Exchange	Product Development User	Manage Group	Manage Group
Oracle Product Development Exchange	Product Development User	Product Planning	User can plan a product
Oracle Product Development Exchange	Product Development User	Program Management	User can manage a program
Oracle Product Development Exchange	Product Development User	Project Creation	User can create a project.
Oracle Product Development Exchange	Product Development User	Project Management	User can manage projects.
Oracle Product Development Exchange	Product Development User	Register	User can register and check the status of the registration.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Product Development Exchange	Product Development User	View About Page	User can view the About page.
Oracle Product Development Exchange	Product Development User	View Catalogs Tab	User can view the Catalogs tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Product Development Exchange	Product Development User	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Product Development Exchange	Product Development User	View Home Page	User can view the Home page.
Oracle Product Development Exchange	Product Development User	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Product Development Exchange	Product Development User	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Product Development Exchange	Product Development User	View Role Description	User can view Role Description
Oracle Product Development Exchange	Product Development User	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Product Development Exchange	Product Development User	View Welcome Tab	User can view Welcome Tab
Oracle Product Development Exchange	Product Development User	View/Update Personal Information	User can view and update own personal information.
Oracle Product Development Exchange	Product Development User	View/Update User Address Book	User can view and update their User Address Book.
Oracle Project Accounting	Project Super User	Access To Do List	User can access personalized To Do List.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Project Accounting	Project Super User	Change Creation	User can create a change
Oracle Project Accounting	Project Super User	Change Management	User can manage a change
Oracle Project Accounting	Project Super User	Document Creation	User can create a document
Oracle Project Accounting	Project Super User	Document Management	User can manage a document
Oracle Project Accounting	Project Super User	Group Creation	User can create a group
Oracle Project Accounting	Project Super User	Issue Creation	User can create an issue
Oracle Project Accounting	Project Super User	Issue Management	User can manage an issue
Oracle Project Accounting	Project Super User	Item Management	User can manage an item
Oracle Project Accounting	Project Super User	Manage Group	Manage Group
Oracle Project Accounting	Project Super User	Project Creation	User can create a project.
Oracle Project Accounting	Project Super User	Project Management	User can manage projects.
Oracle Project Accounting	Project Super User	Role Creation	User can create a role
Oracle Project Accounting	Project Super User	Role Management	User can manage a role
Oracle Project Accounting	Project Super User	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Project Accounting	Project Super User	View Home Page	User can view the Home page.
Oracle Project Accounting	Project Super User	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Project Accounting	Project Super User	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Project Accounting	Project Super User	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Project Accounting	Project Super User	View/Update Personal Information	User can view and update own personal information.
Oracle Project Accounting	Project Super User	View/Update User Address Book	User can view and update their User Address Book.
Oracle Project Accounting	Project User	Access To Do List	User can access personalized To Do List.
Oracle Project Accounting	Project User	Change Creation	User can create a change
Oracle Project Accounting	Project User	Change Management	User can manage a change
Oracle Project Accounting	Project User	Document Creation	User can create a document
Oracle Project Accounting	Project User	Document Management	User can manage a document
Oracle Project Accounting	Project User	Group Creation	User can create a group
Oracle Project Accounting	Project User	Issue Creation	User can create an issue
Oracle Project Accounting	Project User	Issue Management	User can manage an issue
Oracle Project Accounting	Project User	Item Management	User can manage an item
Oracle Project Accounting	Project User	Manage Group	Manage Group
Oracle Project Accounting	Project User	Project Creation	User can create a project.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Project Accounting	Project User	Project Management	User can manage projects.
Oracle Project Accounting	Project User	View Company Information	User can access the View Company Information page to view the user's company information.
Oracle Project Accounting	Project User	View Home Page	User can view the Home page.
Oracle Project Accounting	Project User	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)
Oracle Project Accounting	Project User	View Product Development Page	User can view the Product Development tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Project Accounting	Project User	View Welcome Page	User can view the Welcome tab. (Separate tasks control the user's access to functions within the tab.)
Oracle Project Accounting	Project User	View/Update Personal Information	User can view and update own personal information.
Oracle Project Accounting	Project User	View/Update User Address Book	User can view and update their User Address Book.
Oracle Supply Chain Exchange	Supply Chain Administrator	Access To Do List	User can access personalized To Do List.
Oracle Supply Chain Exchange	Supply Chain Administrator	Base User	Base user that can view supply chain exchange menu
Oracle Supply Chain Exchange	Supply Chain Administrator	Order Pegging	User can view order pegging
Oracle Supply Chain Exchange	Supply Chain Administrator	Order Tracking	User can track the Orders
Oracle Supply Chain Exchange	Supply Chain Administrator	Production Sequencing	User can view Production Sequences and Supply Chain Bills.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Analysis	User can analyze Supply Chain performance.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Bill Import	User can import Supply Chain Bills into Supply Chain Exchange.

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Collaboration Management	User can manage collaboration activities.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Export	User can export data from the Supply Chain Exchange.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Import	User can import data into the Supply Chain Exchange.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Inventory Management	User can perform Supply Chain Inventory management functions.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain User Preferences	User can manage user preferences.
Oracle Supply Chain Exchange	Supply Chain Administrator	Supply Chain Workbench	User can view the Supply Chain Workbench. This includes the Bucketed Views as well as the Vertical listing views.
Oracle Supply Chain Exchange	Supply Chain Administrator	View Exceptions	User can view Exceptions
Oracle Supply Chain Exchange	Supply Chain Administrator	View Plans	User can view plan information.
Oracle Supply Chain Exchange	Supply Chain Planner	Access To Do List	User can access personalized To Do List.
Oracle Supply Chain Exchange	Supply Chain Planner	Add/Delete Alternate Item Identifier	Add/Delete Alternate Item Identifier
Oracle Supply Chain Exchange	Supply Chain Planner	Base User	Base user that can view supply chain exchange menu
Oracle Supply Chain Exchange	Supply Chain Planner	Discover Item	Discover Item
Oracle Supply Chain Exchange	Supply Chain Planner	Item Management	User can manage an item
Oracle Supply Chain Exchange	Supply Chain Planner	Order Pegging	User can view order pegging
Oracle Supply Chain Exchange	Supply Chain Planner	Order Tracking	User can track the Orders

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Supply Chain Exchange	Supply Chain Planner	Production Sequencing	User can view Production Sequences and Supply Chain Bills.
Oracle Supply Chain Exchange	Supply Chain Planner	Remove Item Identifier	User can remove the association between item numbers to identify the same item
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain Analysis	User can analyze Supply Chain performance.
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain Bill Import	User can import Supply Chain Bills into Supply Chain Exchange.
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain Export	User can export data from the Supply Chain Exchange.
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain Import	User can import data into the Supply Chain Exchange.
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain Inventory Management	User can perform Supply Chain Inventory management functions.
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain User Preferences	User can manage user preferences.
Oracle Supply Chain Exchange	Supply Chain Planner	Supply Chain Workbench	User can view the Supply Chain Workbench. This includes the Bucketed Views as well as the Vertical listing views.
Oracle Supply Chain Exchange	Supply Chain Planner	Update Supply/Demand	
Oracle Supply Chain Exchange	Supply Chain Planner	View Alternate Item Identifiers List	View Alternate Item Identifiers List
Oracle Supply Chain Exchange	Supply Chain Planner	View Basic Item information	View Basic Item information
Oracle Supply Chain Exchange	Supply Chain Planner	View Exceptions	User can view Exceptions
Oracle Supply Chain Exchange	Supply Chain Planner	View Item People List	View Item People List
Oracle Supply Chain Exchange	Supply Chain Planner	View My Profile Page	User can view the My Profile Page. (Separate tasks control the user's access to functions within the page.)

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Supply Chain Exchange	Supply Chain Planner	View Plans	User can view plan information.
Oracle Supply Chain Exchange	Supply Chain Reviewer	Base User	Base user that can view supply chain exchange menu
Oracle Supply Chain Exchange	Supply Chain Reviewer	Production Sequencing	User can view Production Sequences and Supply Chain Bills.
Oracle Supply Chain Exchange	Supply Chain Reviewer	Review Supply/Demand	
Oracle Supply Chain Exchange	Supply Chain Reviewer	Supply Chain Analysis	User can analyze Supply Chain performance.
Oracle Supply Chain Exchange	Supply Chain Reviewer	Supply Chain Export	User can export data from the Supply Chain Exchange.
Oracle Supply Chain Exchange	Supply Chain Reviewer	Supply Chain Inventory Management	User can perform Supply Chain Inventory management functions.
Oracle Supply Chain Exchange	Supply Chain Reviewer	Supply Chain User Preferences	User can manage user preferences.
Oracle Supply Chain Exchange	Supply Chain Reviewer	Supply Chain Workbench	User can view the Supply Chain Workbench. This includes the Bucketed Views as well as the Vertical listing views.
Oracle Supply Chain Exchange	Supply Chain Reviewer	View Exceptions	User can view Exceptions
Oracle Transportation	Oracle Transportation Manager	Administer Document Setup	User can set up and maintain document setup
Oracle Transportation	Oracle Transportation Manager	Administer Lane Responsibilities	User can set up and maintain lane restriction rules
Oracle Transportation	Oracle Transportation Manager	Administer Notification Routing Setup	User can set up and maintain rules relating to the routing of notifications
Oracle Transportation	Oracle Transportation Manager	Bulk Loads	"User can do bulk load (lanes, schedules, price lists, zones, regions) and see the status of the same"
Oracle Transportation	Oracle Transportation Manager	Catalog Pricing Estimates	User can do pricing estimate on the selected service lanes

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Transportation	Oracle Transportation Manager	Catalog Search Engine	"User can search for Lanes to Edit, if necessary"
Oracle Transportation	Oracle Transportation Manager	Create or Edit Lane	User can Define or Edit Lanes
Oracle Transportation	Oracle Transportation Manager	Create or Edit Load Zone	User can Maintain Zones
Oracle Transportation	Oracle Transportation Manager	Create or Edit Price Lists	User can Maintain Price Lists
Oracle Transportation	Oracle Transportation Manager	Create or Edit Region	User can Define or Edit Regions
Oracle Transportation	Oracle Transportation Manager	Create or Edit Schedule	User can Define or Edit Schedules
Oracle Transportation	Oracle Transportation Manager	Define or Edit Shipments	"User can create new shipments and modify the existing shipments created, tendered, and pending. User can view Shipment history and details"
Oracle Transportation	Oracle Transportation Manager	Download Shipments	User can download the shipment
Oracle Transportation	Oracle Transportation Manager	Download Templates	Use can Download Templates/DTDs
Oracle Transportation	Oracle Transportation Manager	Maintain Shipments Pickup Requests by Shipper	User (Shipper) can do maintain Shipment Pickup Requests.
Oracle Transportation	Oracle Transportation Manager	Maintain SPR by Transportation Provider	User (Transportation Provider) can do maintain Shipment Pickup Requests.
Oracle Transportation	Oracle Transportation Manager	Negotiation	"User can define negotiation (RFQ, Auction)"
Oracle Transportation	Oracle Transportation Manager	Setup for Shipment Pickup Request Workflow - Carrier	Setup Parameters for Shipment Pickup Request Workflow - Carrier
Oracle Transportation	Oracle Transportation Manager	Setup for Shipment Pickup Request Workflow - Shipper	Setup Parameters for Shipment Pickup Request Workflow - Shipper

Table D–10 Job Function/System Task Cross-Reference Table

Application Name	Job Function Name	System Task Name	Description
Oracle Transportation	Oracle Transportation Manager	Transportation Welcome Page	User can review Transportation functionality on welcome page
Oracle Transportation	Oracle Transportation Manager	Upload Shipments	User can upload the shipments
Oracle Transportation	Oracle Transportation Manager	View and Generate Documents	User can view and generate documents
Oracle Transportation	Oracle Transportation Manager	View Orders	User can view orders ,order details and it's history.

Index