



An Oracle White Paper  
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Introduced in Release 6.0  
E29330-01

## Supplier Initiated Questionnaires



## Overview

Applications: eQ

Focus Area: Supplier Collaboration

Suppliers now have the ability to initiate their own eQuestionnaires through Supplier Portal and submit changes to specifications posted to Supplier Portal.

## The Basics

### Supplier View

When configured properly, suppliers now have access to Supplier Actions in supplier portal. Suppliers allowed to submit changes to a specification posted in Supplier Portal will see the supplier action icon listed next to the specification.

Action Items

Specification(s)

Documents

Receiving Facilities

Group By: Spec Name

Refresh

ABC - Dallas

Results Per Page 20

| Spec Name   | Source Company                         | Source Facility                                     | Receiving Facilities                | Sourcing Status | Supplier Item # | Sourcing Documentation  |
|---|--|---|-------------------------------------|-----------------|-----------------|---|
| <a href="#">Cajun Seasoning</a><br>(5089948-001 - Approved) | International Flavors & Spice Blending | International Flavors & Spice Blending - Carrollton | ABC - Dallas<br>ABC Foods - Atlanta | Review          | cajun-987       |  |
| 1   |  |   |                                     |                 |                 |   |

Figure 1. Supplier action icon

When the supplier selects the supplier action icons, they will be presented with a popup containing the actions available to them.

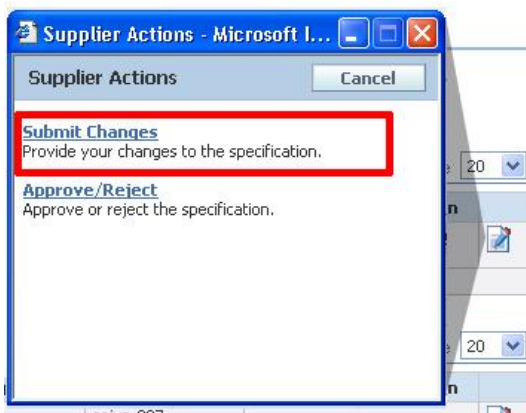


Figure 2. Available actions

Once the supplier clicks the Submit Changes link a questionnaire will be created and launched ready for them to log in. An email will also be sent to them containing configurable content and a link to the questionnaire they just created. If the questionnaire was still open and not submitted, the supplier will be returned to the questionnaire they initiated if they were to click on submit changes again.

## eQ Administrator View

The questionnaire initiated by the supplier will be presented in the eQ owner's action items as if they manually created the questionnaire. Once the supplier submits the questionnaire the eQ administrator will be able to push the changes into GSM.

A few things will help the eQ Administrator understand if a questionnaire was supplier initiated:

1. A flag of Supplier Initiated will be visible on the eQ, next to the Date Sent field.

## eQuestionnaire

| Summary | Ingredient Attributes | Formulation | Compliance | Nutrient Properties | Supporting Docs |
|---------|-----------------------|-------------|------------|---------------------|-----------------|
|---------|-----------------------|-------------|------------|---------------------|-----------------|

**Questionnaire Label:** steve3  
**Questionnaire #:** 5012115  
**Access Level:**  
**Primary Owner:** Randal Burrier  
**Additional Administrators:**

**Date Sent:** 8/24/2006 - Supplier Initiated

Figure 3. Date Sent field

- A sortable supplier initiated column is included in the eQ action items listing.

## eQuestionnaire

| eQ Action Items         |                      |              |                          |            |            |                    |    |
|-------------------------|----------------------|--------------|--------------------------|------------|------------|--------------------|----|
| Questionnaire #         | Title                | Company Name | Email Address            | Date Sent  | Due Date   | Supplier Initiated | Da |
| <a href="#">5011967</a> | 20050801 EQ Test Ing | test         | rspeegle@prodika.com     | 11/28/2007 | 5/5/2006   | No                 |    |
| <a href="#">5011971</a> | DK - Test 0508061000 |              | dkrishnan@prodika.com    | 5/13/2006  | 5/31/2006  | No                 |    |
| <a href="#">5011972</a> | pj                   | ;lk;l        | pjagarlapudi@prodika.com | 5/8/2006   | 5/16/2006  | No                 |    |
| <a href="#">5011986</a> | kj                   | k            | srehmani@prodika.com     | 5/8/2006   | 5/10/2006  | Yes                |    |
| <a href="#">5011993</a> | Product Spec         |              | jwilkins@prodika.com     | 5/11/2006  | 5/13/2006  | No                 |    |
| <a href="#">5012001</a> | Test dk0511061015    |              | dkrishnan@prodika.com    | 8/3/2007   | 5/31/2006  | No                 |    |
| <a href="#">5012002</a> | Product Spec         |              | jwilkins@prodika.com     | 5/11/2006  | 5/13/2006  | Yes                |    |
| <a href="#">5012011</a> | Test dk0512061120    |              | dkrishnan@prodika.com    | 11/14/2006 | 11/14/2006 | No                 |    |

Figure 4. Supplier Initiated column

- Supplier Initiated has been added as questionnaire search criteria and as a column in the search results.

## Configuring Supplier Initiated Questionnaires

- Feature Configuration

A primary configuration to turn this feature on and off is available, by default this configuration is set to True. To turn off the feature change this value to “false”.

```
<add key="EQ.SupplierInitiatedQuestionnaire.Enabled" value="true"/>
```

- Sourcing Approval


The sourcing approval and specification workflow control when a specification is published to supplier portal. For more information about this see the *Agile Product Lifecycle Management for Process Supplier Portal User Guide*.


There is a new section available on the sourcing approval that allows you to grant access to a supplier to submit changes. The Supplier Initiated Questionnaire section is available on the

Summary tab of the spec-related sourcing approval. This section is only applicable on sourcing approvals tied to specifications supported in eQ. For example, on sourcing approvals tied to equipment specifications or non co-pack trade specifications this section is not supported.

#### Supplier Initiated Questionnaire

**Supplier can initiate Edits:** ☐ Yes

**Questionnaire Owner:**  

**Additional Administrators:**  

**Due Date:**  days after initiated

**Documentation Due Date:**  days after initiated

**Amber Date:**  days before due date

Figure 5. Supplier Initiated Questionnaire section

- **Supplier can initiate edits**—This selection controls whether the supplier can initiate edits to the specification. If selected, the supplier will see the Submit Changes button in the specification listing in Supplier Portal.
- **Questionnaire owner field**—This field initiates a single select UGM user EQT. The UGM user selected here will be set as the owner of the questionnaire.
- **Additional Administrators field**—This field initiates the multi-select UGM user and group EQT. The UGM groups or users selected here will be set as the additional administrators of the questionnaire.
- **Due Date**—Number of days after supplier initiates questionnaire that it is due. The default is 10 days.
- **Supporting Documentation Due Date**—Number of days after supplier initiates questionnaire that the supporting documentation is due. The default is 10 days.
- **Amber Date**—Number of days before due date that you want the date to switch to amber. The default is 5 days.

### 3. eQ Template

When a supplier initiates a questionnaire all of the applicable specification data is imported into a questionnaire template to help create the questionnaire. A template needs to be created for each eQ specification type you are supporting (Ingredient, Packaging Material, Printed Packaging, etc.)

To create an eQ template, create a questionnaire filling out all of the appropriate data (discussed below). Save and Close your template, you should then see the Save as Template action button. This button is only available to users that have the EQ\_Template\_Creator

role. If a template for that specification type already exists you will be presented with a warning message, letting you know what questionnaire you are replacing.

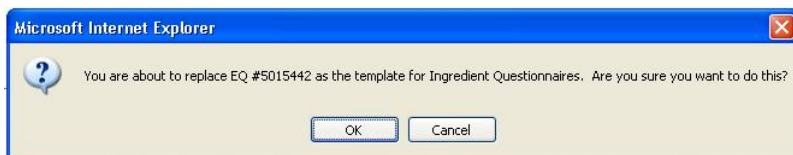


Figure 6. Warning message

Once a questionnaire is designated as a template the “Send eQ” action button will not be available in eQ. There will be a flag on the questionnaire designating that it is a template. This flag “Template” appears to the right of the questionnaire number.



Figure 7. Template flag

### Questionnaire Data

When a questionnaire is initiated, the data from the specification will be imported into the questionnaire. However, some items can’t be controlled by the specification. For example, user group selection for compliance items or supplier created breakdown ability. All of these values will be taken from the template.

In addition, you can add data to the template and it will be sent with every questionnaire. If there is a conflict between the specification and the questionnaire data, the specification will win.

See Figure 7 for more information on how data is defined.

### Configurable Questionnaire Title

The eQuestionnaire title is configurable for supplier initiated questionnaires by placing variables into the template’s Questionnaire Label field. You can configure the following:

Cross Reference number(s) {CrossReference}

GSM specification number {GSMSpecNumber}

GSM Short Name {GSMShortName}

GSM Spec Name {GSMSpecName}

Supplier item code {SupplierItemCode}

Supplier’s Company Name {SupplierCompany}

In addition, you are able to restrict the amount of characters returned. For example, {GSMSpecName,15} would restrict the string returned to 15 characters.

### Required or Optional

There is a configuration available to set all imported specification data as required. By default all specification data imported into the questionnaire is set to optional. If you would like to change this behavior adjust the following configuration line:

```
<add key="EQ.SupplierInitiatedQuestionnaire.EQItem.RequireSpecContents.Enabled"
value="false"/>
```

**Note:** This is not applicable to custom sections. Custom section validation rules are too complex to assume. Currently all custom data will be optional for supplier initiated questionnaires.

| 1  | Questionnaire Field                                       | Defined By                                      |
|----|---|---|
| 2  | Label   | Specification or eQ Configurable Name variables |
| 3  | #   | System Defined                                  |
| 4  | Status  | System Defined                                  |
| 5  | Access Level  | Specification                                   |
| 6  | Primary Owner   | Sourcing Approval or Template                   |
| 7  | Additional Administrators                                 | Sourcing Approval + Template                    |
| 8  | Due Date  | Sourcing Approval                               |
| 9  | Supporting Documentation Due Date                         | Sourcing Approval                               |
| 10 | Amber Date  | Sourcing Approval                               |
| 11 | Comments/Guidance   | Template  |
| 12 | Supplier Contact Information                              | Supplier Portal                                 |
| 13 | Company Contact Information                               | Sourcing Approval or Template                   |
| 14 |   |   |
| 15 | <b>Questionnaire Items</b>                                |   |
| 16 | Attributes (Ing/Prod/Trd-Nutp/Pkg/PPkg)                   | Specification + Template                        |
| 17 | % Breakdown   | Specification                                   |
| 18 | Supplier Created %Breakdown                               | Template  |
| 19 | Shelf Life  | Specification + Template                        |
| 20 | Compliance  | Specification + Template                        |
| 21 | Compliance (User Group Selection)                         | Template  |
| 22 | Compliances (Free Text)                                   | Template  |
| 23 | Allergens, Intolerances, Additives                        | Specification + Template                        |
| 24 | Allergens, Intolerances, Additives (Max/100g - Source)    | Specification + Template                        |
| 25 | Allergens, Intolerances, Additives (User Group Selection) | Template  |
| 26 | Allergens, Intolerances, Additives (Free Text)            | Template  |
| 27 | Analytical Properties                                     | Specification + Template                        |
| 28 | Extended Attributes                                       | Specification + Template                        |
| 29 | Nutrient Properties                                       | Specification + Template                        |
| 30 | Nutrient Properties (User Group Selection)                | Template  |
| 31 | Supporting Documents                                      | Template  |
| 32 | DRL Documents   | Template  |
| 33 | Custom Sections   | Specification + Template                        |
| 34 | Nutrient Profile Panel Attributes (Trade eQ)              | Specification + Template                        |
| 35 | Supplier Item #   | Sourcing Approval + Template                    |
| 36 | Env. Waste  | Specification + Template                        |
| 37 | Trade Packaging Attributes                                | Specification + Template                        |
| 38 | Nutp Weight/Volume/Serving Information                    | Specification + Template                        |

Figure 7. Defining data





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