# Oracle® Agile Product Lifecycle Management for Process

Supply Chain Relationship Management User Guide

Release 6.1.1.5

**E57831-01**

November 2014

Oracle Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide, Release 6.1.1.5

E57831-01

# Contents

## 3 Sourcing Approvals

# Preface

The *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide* explains how the Supply Chain Relationship Management (SCRM) application provides collaborative business process for managing supply chain relationships and sourcing approvals across product suppliers, distributors, and all other supply chain participants.

This Preface contains these topics:

- Audience
- Variability of Installations
- Documentation Accessibility
- Software Availability
- Related Documents
- Conventions

## Audience

This guide is intended for end users who are responsible for creating and managing information in Agile Product Lifecycle Management (PLM) for Process. Information about administering the system resides in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

## Variability of Installations

Descriptions and illustrations of the Agile PLM for Process user interface included in this manual may not match your installation. The user interface of Agile PLM for Process applications and the features included can vary greatly depending on such variables as:

- Which applications your organization has purchased and installed
- Configuration settings that may turn features off or on
- Customization specific to your organization
- Security settings as they apply to the system and your user account

# Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc`.

### Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info` or visit `http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs` if you are hearing impaired.

# Software Availability

Oracle Software Delivery Cloud (OSDC) provides the latest copy of the core software. Note the core software does not include all patches and hot fixes. Access OSDC at:

http://edelivery.oracle.com.

# Related Documents

For more information, see the following documents in the Oracle Agile PLM for Process documentation set:

- *Agile Product Lifecycle Management for Process Administrator User Guide*
- *Agile Product Lifecycle Management for Process Global Specification Management User Guide*
- *Agile Product Lifecycle Management for Process Supplier Portal User Guide*
- *Agile Product Lifecycle Management for Process eQuestionnaire User Guide*
- *Agile Product Lifecycle Management for Process Getting Started Guide*
- *Agile Product Lifecycle Management for Process Release Notes*. Up-to-date Release Notes and other documentation are posted on Oracle Technology Network (OTN) at this location:

  http://www.oracle.com/technetwork/documentation/agile-085940.html#plmprocess

## Conventions

The following text conventions are used in this document:

| Convention | Meaning |
|---|---|
| **boldface** | Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary. |
| *italic* | Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values. |
| `monospace` | Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter. |

# 1

# Introducing Supply Chain Relationship Management

This chapter gives an overview of Supply Chain Relationship Management and describes how the application interfaces with other Agile PLM for Process applications. It includes the following topics:

- Overview
- Touch Points with Other Applications
- Getting Started with Supply Chain Relationship Management

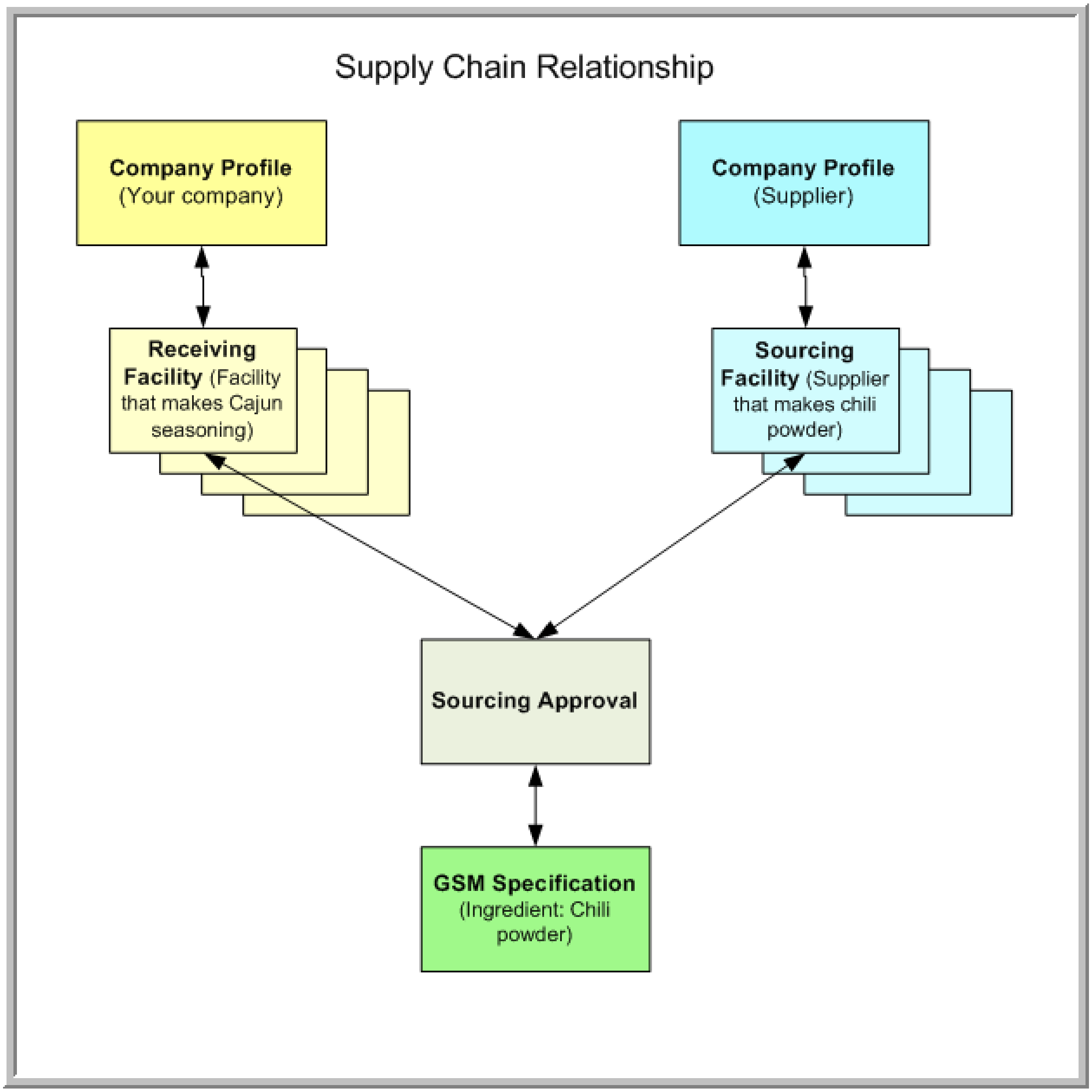
## Overview

Supply Chain Relationship Management (SCRM) provides collaborative business process for managing supply chain relationships and sourcing approvals across product suppliers, distributors, and all other supply chain participants.

You can use Supply Chain Relationship Management to build a view of the relationships between participants in a supply chain. Agile PLM for Process can leverage the information you provide in other applications such as Global Specification Management (GSM) and Supplier Portal (SP).

Figure 1–1 shows the supply chain relationship of a company, a supplier, and an ingredient specification. In this example, a company owns a receiving facility that produces Cajun seasoning. The receiving facility obtains the chili powder required for the Cajun seasoning from a supplier sourcing facility. The sourcing approval tracks the approval relationship from the sourcing facility to the receiving facility.

***Figure 1–1 Supply chain***




Supply Chain Relationship Management can enable several critical business processes, including:

- Vendor management
- Sourcing management and compliance
- Vendor consolidation and rationalization
- Supply chain analysis
- Product traceability

# Touch Points with Other Applications

The SCRM application interfaces with several other applications.

## Global Specification Management

Global Specification Management (GSM) provides your company with a tool to create and modify your company's products, including finished products and manufacturing processes to ingredient and packaging specifications. These specifications are syndicated to SCRM, where sourcing approvals are created. Refer to the *Agile Product Lifecycle Management for Process Global Specification Management User Guide* for more information.

## Manage Core Data

Your Agile PLM for Process administrator uses the Manage Core Data application (ADMN) to manage core data such as data lists and extended attributes. Core data that is specific to SCRM includes the following and is further explained in the *Agile Product Lifecycle Management for Process Administrator User Guide*:

- Business units
- Classes
- Company extended attributes
- Contact categories
- Document types
- Facility extended attributes
- Protocol IDs
- SDM statuses
- Sourcing types

## Workflow Administration

Workflows drive sourcing approvals, an integral part of SCRM. As part of workflow management, an Agile PLM for Process administrator plans and creates workflows using the Workflow Administration (WFA) application. This process involves creating workflow statuses, workflow transitions, workflow functional areas, and workflow groups. The workflows are then saved to Agile PLM for Process and integrated across all applications. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information.

## eQuestionnaire

The eQuestionnaire (eQ) application's communication and coordination tools can be used to increase supply side collaboration between your company and its suppliers. Questionnaires containing specific data requests are created and sent electronically to suppliers. Once the requested data is returned, it can then be automatically integrated into GSM and other applications. The user has the ability to create new questionnaires for information-gathering purposes or send existing ones for validation. Refer to the *Agile Product Lifecycle Management for Process eQuestionnaire User Guide* for more information.

## Supplier Portal

Supplier Portal provides a central location for your company's supply chain partners to access procurement and sourcing-related specifications, business processes and protocols in a flexible, secure and user-customizable environment. It gives internal resources and external supply chain partners (such as vendors, suppliers, brokers and distributors) the ability to obtain:

- Information regarding the specifications that are to be sourced
- Guidance surrounding expectations of deliverables
- Contact information of the various facilities and resources with which they may need to interact

Using Supplier Portal, you can set restrictions that control what information in Agile PLM for Process is visible to your suppliers. Refer to the *Agile Product Lifecycle Management for Process Supplier Portal User Guide* for more information.

## Product Quality Management

Product Quality Management allows you to capture, manage and correct quality issues around suppliers and the items they supply. PQM can also be used to capture, manage and correct quality issues around internal facilities and the items they produce. For more information, refer to the *Agile Product Lifecycle Management for Process Product Quality Management User Guide.*

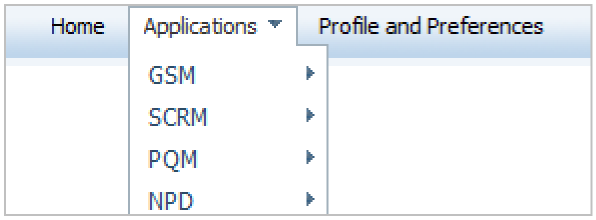
# Getting Started with Supply Chain Relationship Management

## Accessing Supply Chain Relationship Management

To access the Supply Chain Relationship Management application, select **SCRM** from the left navigation panel as shown in Figure 1–2, or select **SCRM** from the Applications menu on the top menu bar as shown in Figure 1–3.

***Figure 1–2 The left navigation panel***

***Figure 1–3 The Applications menu***




For general information on using Agile Product Lifecycle Management for Process software, see the *Agile Product Lifecycle Management for Process Getting Started Guide.*

# 2

# Company and Facility Profiles

This chapter describes how to use Supply Chain Relationship Management to create and maintain company and facility profiles. The topics covered include:

- Overview of Profiles
- Searching for a Company or Facility Profile
- Creating a Company Profile
- Saving the Company Profile
- Creating a Facility Profile
- Saving the Facility Profile
- Assigning a Facility to a Different Company

## Overview of Profiles

Supply Chain Relationship Management (SCRM) serves as a comprehensive platform for managing global supply and distribution relationships, and is a centralized repository for global provider information.

Information about each company is organized into two levels:

- Company profiles
- Facility profiles

Every relationship in the supply chain must have a company profile. You can arrange company relationships hierarchically, allowing you to model the sourcing relationships as far up the chain as necessary. After a company profile is created, you can create its facility profiles. Facility profiles may only be created from within a company profile. Each company may have multiple facility profiles.

**Note:** You cannot delete a company profile or a facility profile in SCRM.

# Searching for a Company or Facility Profile

Use the Company Profile and Facility Profile search pages to search for companies and facilities. The returned search results include companies or facilities that you have access to. The company and facility search pages work like other search pages in Agile PLM for Process. For instructions on using the search page, see the *Agile Product Lifecycle Management for Process Getting Started Guide*.

> **Note:** Your visibility and access could be determined by your SCRM business unit, which is assigned in the User feature of the User Group Management (UGM) application. If SCRM BU security is configured on, all search screens in Agile PLM for Process that include SCRM companies and facilities respect this visibility. For more information on visibility, see the *Agile Product Lifecycle Management for Process Security Configuration Guide*.

# Creating a Company Profile

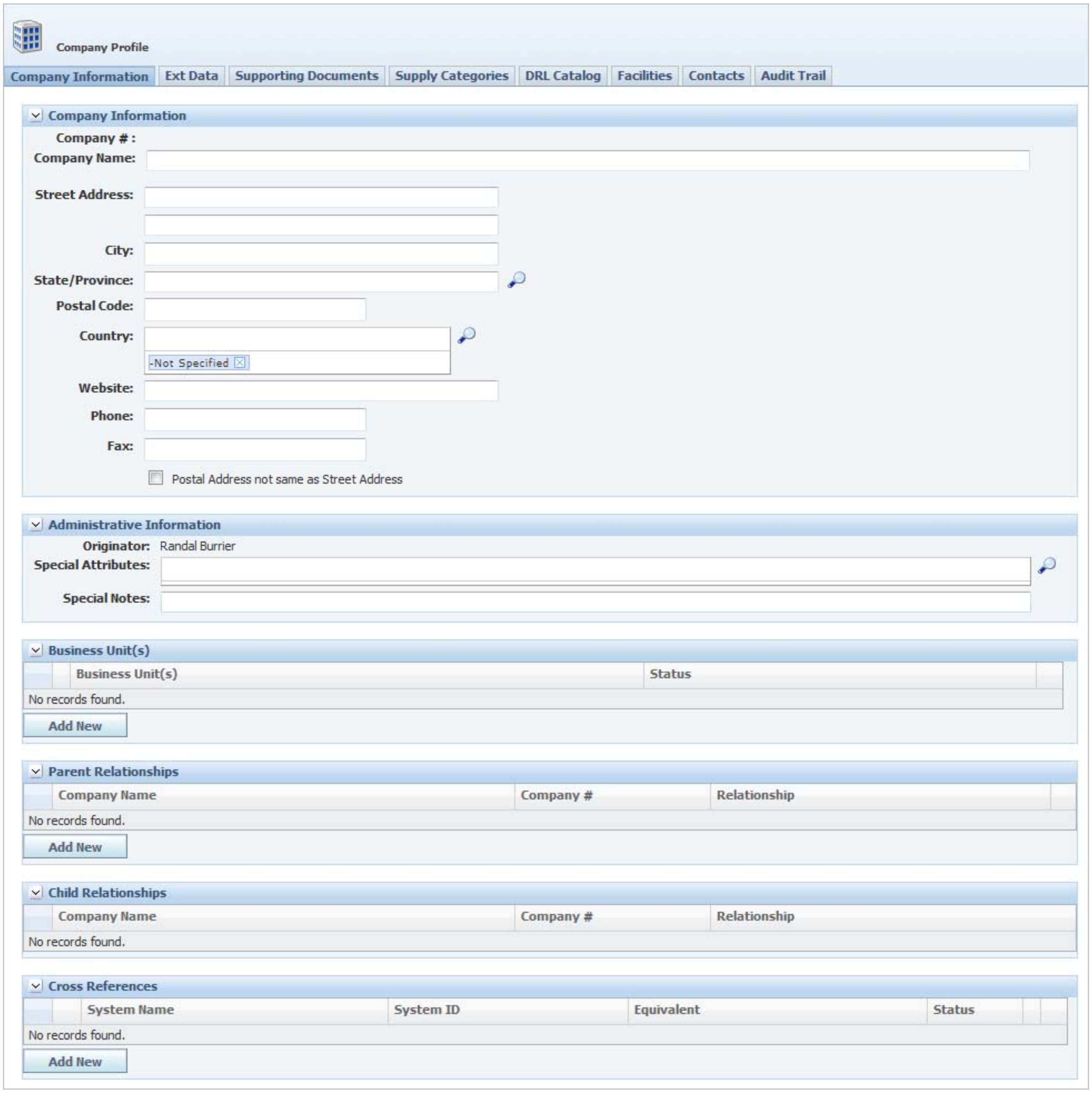
You can create a company profile in the following ways:

- By using the **New > Company Profiles > Blank** option from the action menu in SCRM. This option creates a company profile containing no data.
- By using the **New > Company Profiles > From Template** option from the action menu in SCRM. This option creates a company profile with data pre-filled from a chosen template.

Use the Company Profile page to create a company. This page includes the following tabs, as shown in Figure 2–1:

- Company Information Tab
- Ext Data Tab
- Supporting Documents Tab
- Supply Categories Tab
- DRL Catalog Tab
- Facilities Tab
- Contacts Tab
- Audit Trail Tab

***Figure 2–1 Company Profile page***




## Company Information Tab

Enter data in the sections on the Company Information page to complete the company profile.

### Company Information Section

Use the Company Information section to provide general information such as company name, address, Web site, phone number, and fax number. When you save the information by clicking **Save**, the system assigns a company number that displays in the Company # field.

Company Name is a required field.

### Administrative Information Section

Use the Administrative Information section to keep track of special designations for the company that may be required for reporting and tracking. The Originator field shows you who created the company profile. This field is uneditable. Use the Special Attributes field to show special designations, such as ISO9000 and Minority or Women Owned Business.

### Business Unit(s) Section

Use the Business Units section to specify the company's affiliation with one or more participating business units (required) and current status with regard to each business unit. Depending on your SCRM security configuration, you will only see business units that you have access to. Figure 2–2 shows the Business Unit(s) section.

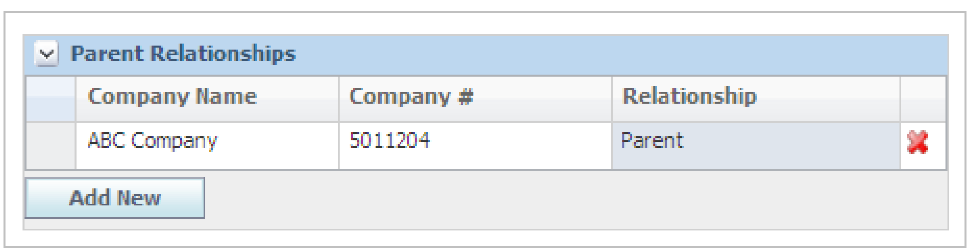
***Figure 2–2 Business Unit(s) section***


Business Unit(s) is a required field. Click **Add New** to select and add a business unit from the Business Unit dialog box.

### Parent Relationships Section

Use the Parent Relationships section, shown in Figure 2–3, to establish a parent company or agent relationship between this company (child) and a parent company.

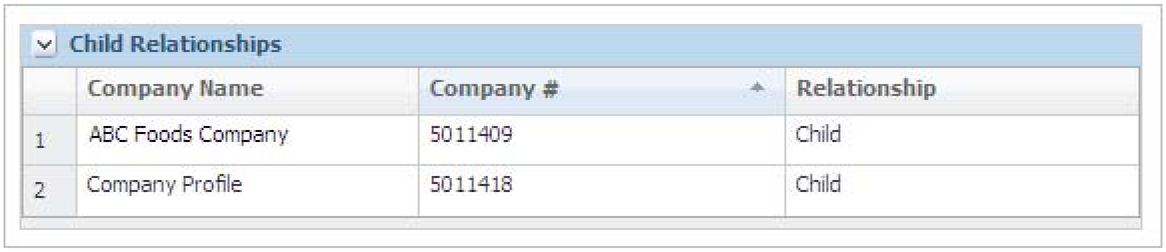
***Figure 2–3 Parent Relationship section***




### Child Relationships Section

The Child Relationships section displays all related child companies for this company. When you select a parent company from the list of existing companies, you automatically create a child company relationship at the child company level. You can view the profile of a child company by clicking the linked Company Name field, as shown in Figure 2–4:

***Figure 2–4 Child Relationships section***



Child Relationships

| | Company Name | Company # | Relationship |
|---|---|---|---|
| 1 | ABC Foods Company | 5011409 | Child |
| 2 | Company Profile | 5011418 | Child |

### Cross References Section

The Cross References section includes the system name, system ID, equivalent and status assigned to this company in an external system. A company can have multiple entries.

## Ext Data Tab

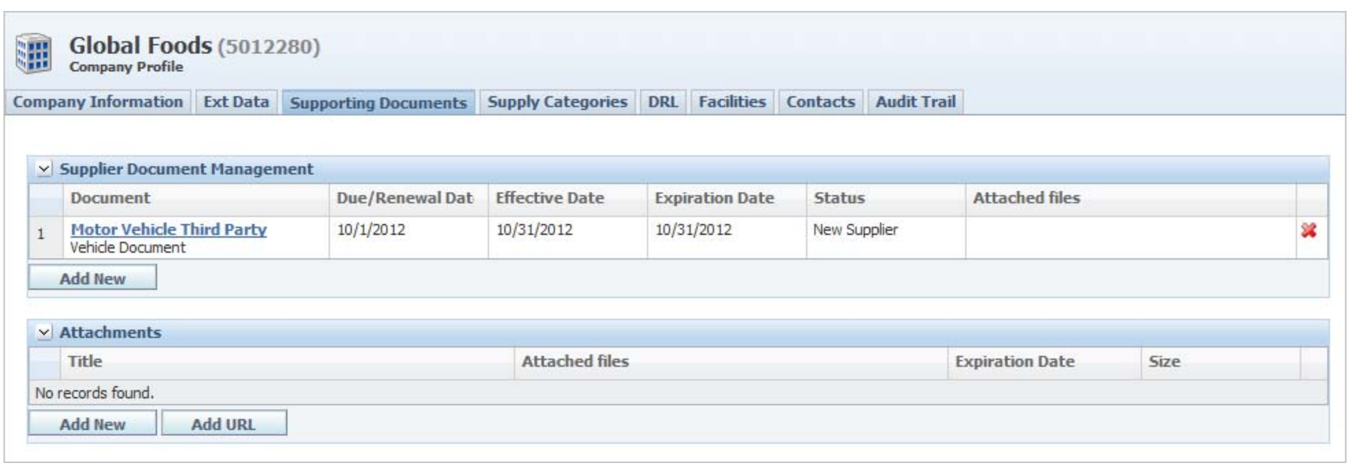
Use the Ext Data tab to enter extended attributes or custom sections for a company. This tab is described in detail in the *Agile Product Lifecycle Management for Process Getting Started Guide*.

## Supporting Documents Tab

Use the Supporting Documents tab to store documents for a company. You can also specify some documents to be viewed by suppliers who are using the Supplier Portal. You must save a company profile before you can add a supplier document or attachment. Refer to Chapter 4, "Supplier Document Management" for more detailed information. The Supporting Documents page consists of the following sections, shown in Figure 2–5:

- Supplier Document Management Section
- Attachments Section

***Figure 2–5 Supporting Documents tab***




### Supplier Document Management Section

Refer to Chapter 4, "Supplier Document Management" for more detailed information on creating, editing, and managing supplier documents.

## Attachments Section

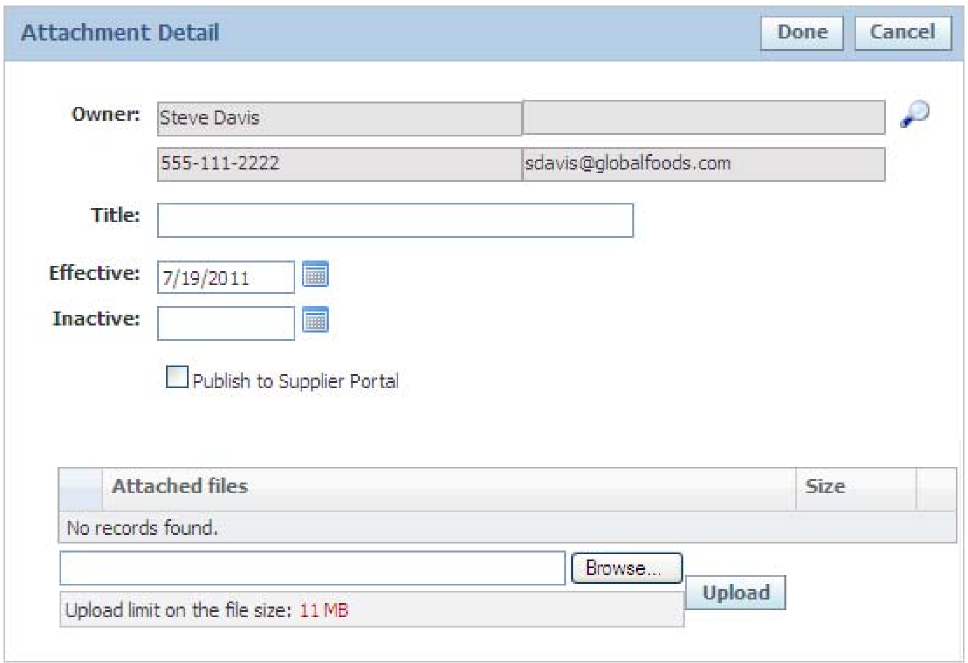
Use this section to add an attachment or URL to the company profile.

### Adding an Attachment

To add an attachment:

1. Click **Edit** in the action menu. The page reloads in edit mode, and the Add New button displays under the Attachments section.
2. Click **Add New**. SCRM displays the Attachment Detail dialog box, as Figure 2–6 shows:

***Figure 2–6 Attachment Detail dialog box***



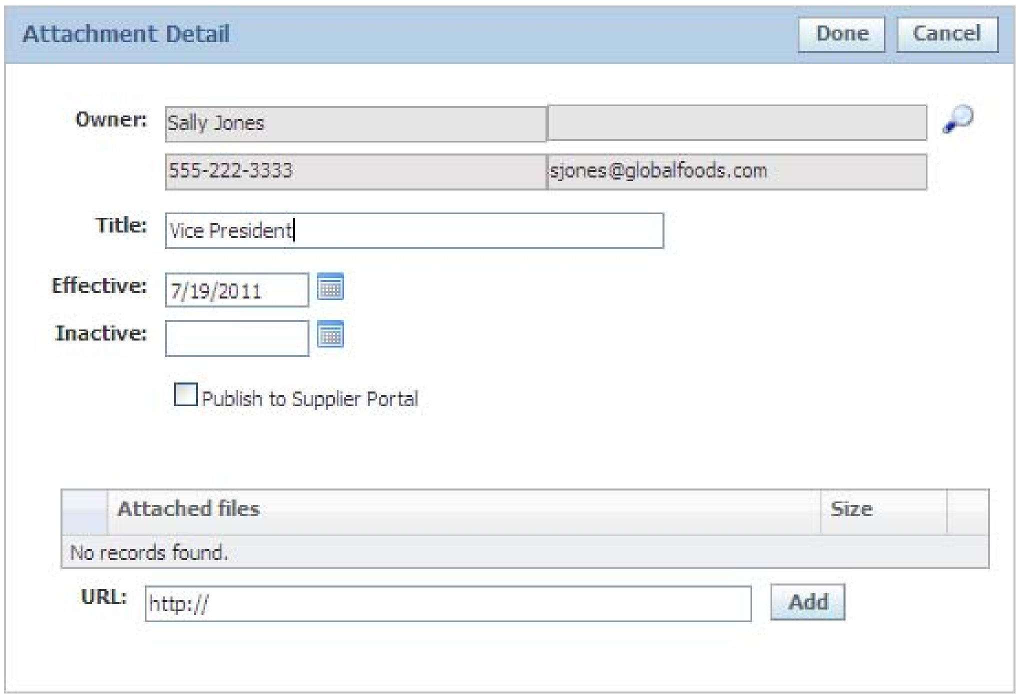

3. Complete the following fields:
   - **Owner** — Owner of the attachment. This field is pre-populated with the name of the user who is logged into the system.
   - **Title** — Title of the attachment.
   - **Effective** — Effective date of the attachment. This field is pre-populated with the current date.
   - **Publish to Supplier Portal** — Check this box if you want to publish the attachment on Supplier Portal.
4. Attach the file by clicking **Browse** to search for the file, and then click **Upload**.
5. Click **Done** at the top right of the dialog box.
6. Click **Save** in the action menu of the Company Profile page.

### Adding a URL

To add a URL:

1. Click **Edit** in the action menu. The page reloads in edit mode, and the Add URL button displays under the Attachments section.
2. Click **Add URL**. SCRM displays the Attachment Detail dialog box, as Figure 2–7 shows:

***Figure 2–7 Attachment Detail dialog box, URL***



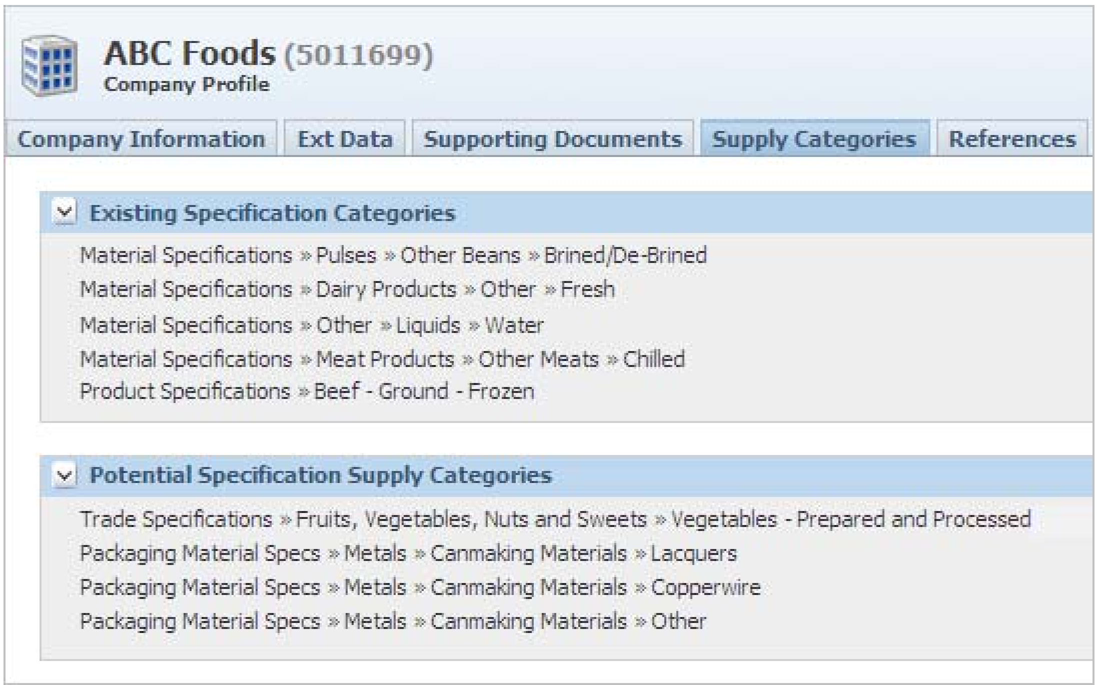

3. Complete the following fields:
   - **Owner** — Owner of the attachment. This field is pre-populated with the name of the user who is logged into the system.
   - **Title** — Title of the attachment.
   - **Effective** — Effective date of the attachment. This field is pre-populated with the current date.
   - **Publish to Supplier Portal** — Check this box if you want to publish the URL attachment on Supplier Portal.
4. Enter the address of the URL in the **URL** field, and then click **Add**.
5. Click **Done** at the top right of the dialog box.
6. Click **Save** in the action menu of the Company Profile page.

## Supply Categories Tab

The Supply Categories tab displays a consolidated list of the categories associated with all existing and potential specifications being sourced by this company (aggregated across all facilities). As Figure 2–8 shows, it consists of two sections:

- **Existing Specification Categories** — This list is automatically generated based on the existing specifications attached to each facility via sourcing approvals.
- **Potential Specification Supply Categories** — This list is automatically generated based on potential categories attached to each facility via alternate (estimated) specification-related supply capabilities.

***Figure 2–8 Supply Categories tab***




## DRL Catalog Tab

Use the DRL Catalog tab to reference DRL catalogs of documents. The catalogs listed here will be available to vendors via the Supplier Portal. Refer to the *Agile Product Lifecycle Management for Process Document Reference Library User Guide* for more information. Figure 2–9 shows the DRL Catalog tab:

***Figure 2–9 DRL Catalog tab***

## Facilities Tab

You can add facilities owned by the company using the Facilities tab. When you add a facility for a company, the facility is tied to the company and considered a "child" of that company.

---

**Note:** You must create a facility profile within an existing company profile. When you create a new company profile, you must save the profile before you can create the facility profile.

---

For detailed information on creating a facility profile, see "Creating a Facility Profile" on page 2-12.

The Facilities tab is shown in Figure 2–10:

***Figure 2–10 Facilities tab***


## Contacts Tab

The Contacts tab, shown in Figure 2–11, displays contacts for the company.

***Figure 2–11 Contacts tab***

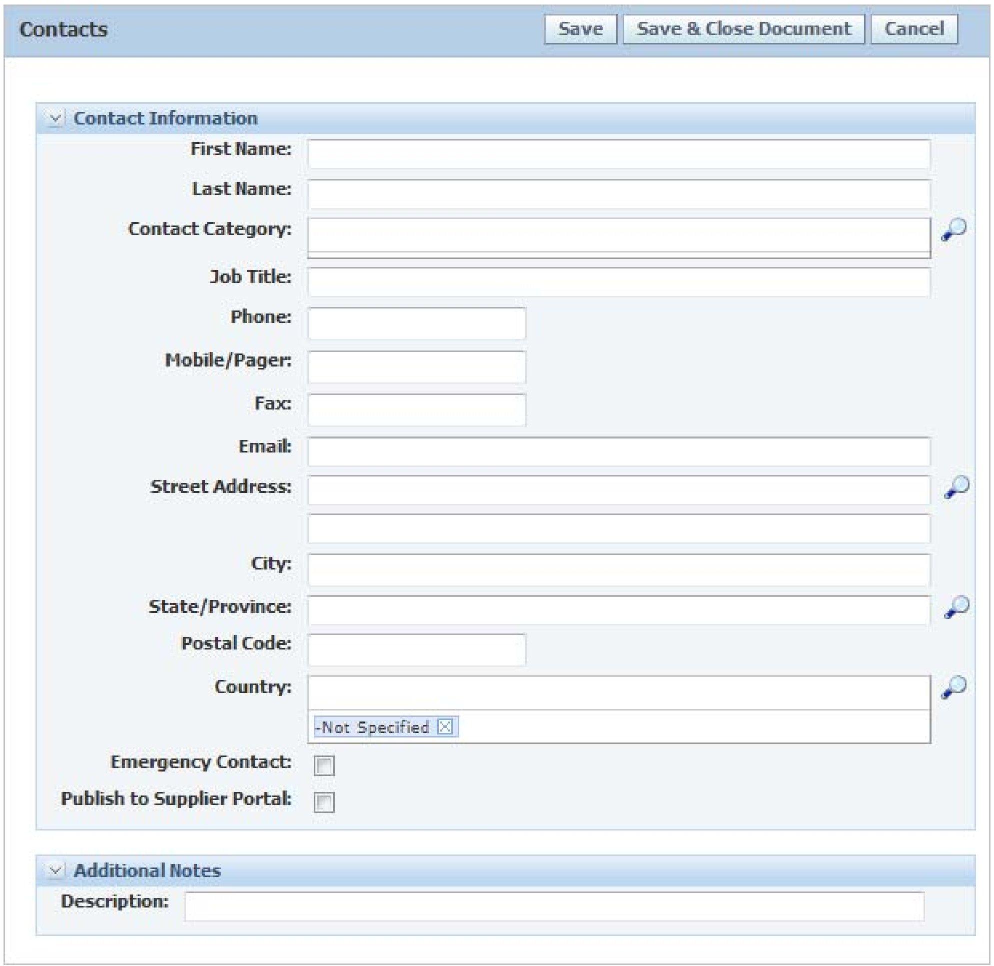
### Adding a Contact

After you have saved a company profile, you can add company contacts.

To add a contact:

1. Click **Edit**. The Add New button displays under the Company Contacts grid.
2. Click **Add New**. The Contacts dialog box, shown in Figure 2–12, displays.

***Figure 2–12 Contacts dialog box***

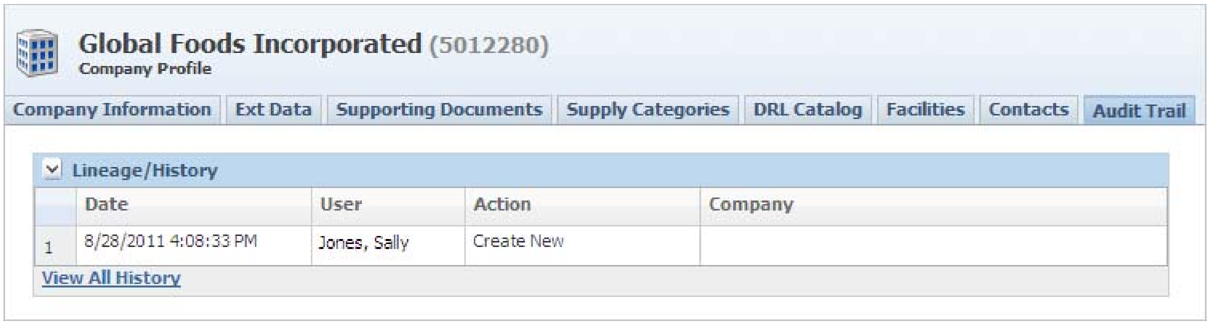



3. Add contact information such as first and last name, job title, phone number, email, address, and whether the contact is designated as an emergency contact.
   - Click the search icon ( ) to import an existing address. When you select the icon, a dialog box is displayed that lists all available addresses for that company. This feature allows you to use an existing address versus repeatedly retyping the same address.
   - Check the **Publish to Supplier Portal** box to make the contact viewable in the Supplier Portal.
4. Click **Save**.

## Audit Trail Tab

Use the Audit Trail tab, shown in Figure 2–13, to view the history of how a company was created.

*Figure 2–13 Audit Trail tab*




The Lineage/History section shows a history of how a company was created and contains the following fields:

**Date**—Date and time the record was created.

**User**—User that created the record.

**Action**—The type of action that created this record:

- **Create New**—This record was created from blank.
- **Create New From Template**—This record was created from a template. The template is listed in the Company column.
- **Import From** (only available for specification-related sourcing approvals)—This record was created by importing existing specification-related sourcing approvals to a material in GSM.

**Company**—The corresponding object that was used based on the action performed. For example, when created from a template, the template used to create the record is listed.

# Saving the Company Profile

Once you entered all data for the company profile, click **Save & Close**.

# Creating a Facility Profile

A facility is a plant or manufacturing location. When you create a facility within a company profile, the facility becomes a "child" of the "parent" company. A company is a vendor, supplier, broker, distributor, or co-packer.

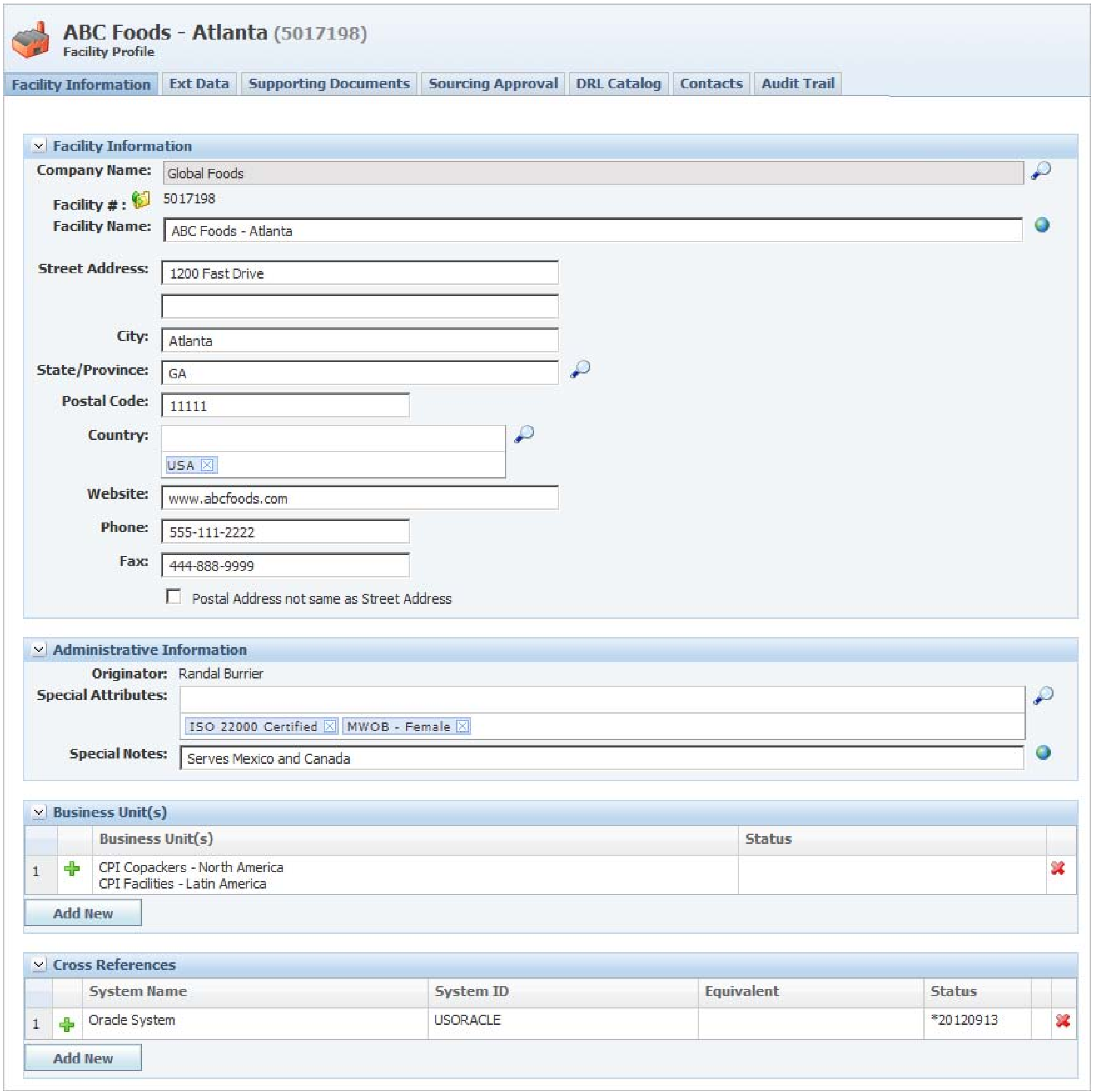
You can create a facility profile in the following ways:

- By using the **New > Facility Profiles > Blank** option from the action menu in SCRM. This option creates a facility profile containing no data.
- By using the **New > Facility Profiles > From Template** option from the action menu in SCRM. This option creates a facility profile with data pre-filled from a chosen template.
- By creating it from the parent company profile. To create the facility using the company profile, first select the parent company using the search page. Then, select the **Facilities** tab and click **Add New > Blank** or **Add New > From Template**.

## Facility Profile Page

Figure 2–14 shows the Facility Profile page.

*Figure 2–14 Facility Profile page*




The facility profile page consists of several tabs across the top of the page:

- Facility Information Tab
- Ext Data Tab
- Supporting Documents Tab
- Sourcing Approval Tab
- DRL Catalog Tab
- Contacts Tab
- Audit Trail Tab

Use these tabs to set up a facility profile in the same way that you created a company profile.

## Facility Information Tab

Enter data in the Facility Information tab to complete the facility profile. The Facility Information tab contains the following sections:

- Facility Information Section
- Administrative Information Section
- Business Unit(s) Section
- Cross References Section

### Facility Information Section

Use the Facility Information section to provide general information such as company name (required), facility name (required), address, Web site, phone number, and fax number.

If you created the facility profile using the **New > Facility Profile** option, assign a **Company Name** by clicking the search icon ( ) and selecting a company. Type a facility name in the **Facility Name** field.

If you created the facility profile from the parent company, the facility's parent name automatically displays in the **Company Name** field. This field contains a link to the Company Profile page. For the **Facility Name**, click the import data icon ( ) to import contact information associated with the parent company. The system automatically populates the Facility Information fields with the company contact information.

> **Note:** You can reassign the facility to a new company using the Company Name field if you are assigned the [SCRM_FACILITY_RELOCATER] role. For more information, refer to "Assigning a Facility to a Different Company" on page 2-21.

Once you save the information by clicking **Save** in the action menu, the system assigns a facility number which displays in the Facility (Prodika #) field.

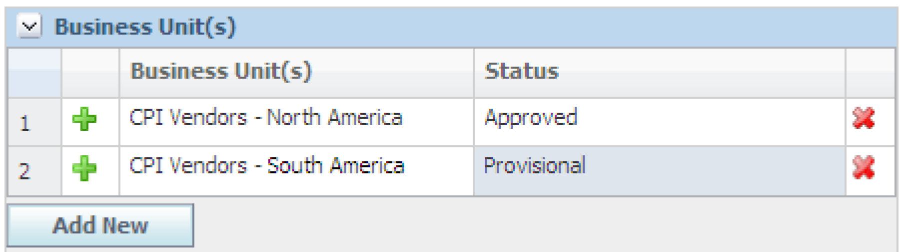
### Administrative Information Section

Use the Administrative Information section to keep track of special designations for the facility which may be required for reporting and tracking. The Special Attributes field shows special designations, such as ISO9000 and Minority or Women Owned Business.

### Business Unit(s) Section

Use the Business Unit(s) section to specify the facility's affiliation with one or more participating company's business units (required) and the current status for each business unit. Figure 2–15 shows the Business Unit(s) section of the Facilities Profiles page.

***Figure 2–15 Business Unit(s) section***




Business Unit(s) is a required field. Click **Add New** to select a business unit from the Business Unit dialog box.

The business units listed are tied to sourcing approvals and can play a key role in workflow resolution.

### Cross References Section

Use the Cross References grid to list the system name, system ID, equivalent value, and status assigned to this facility in a legacy, ERP, or vendor system. You can make multiple entries.

## Ext Data Tab

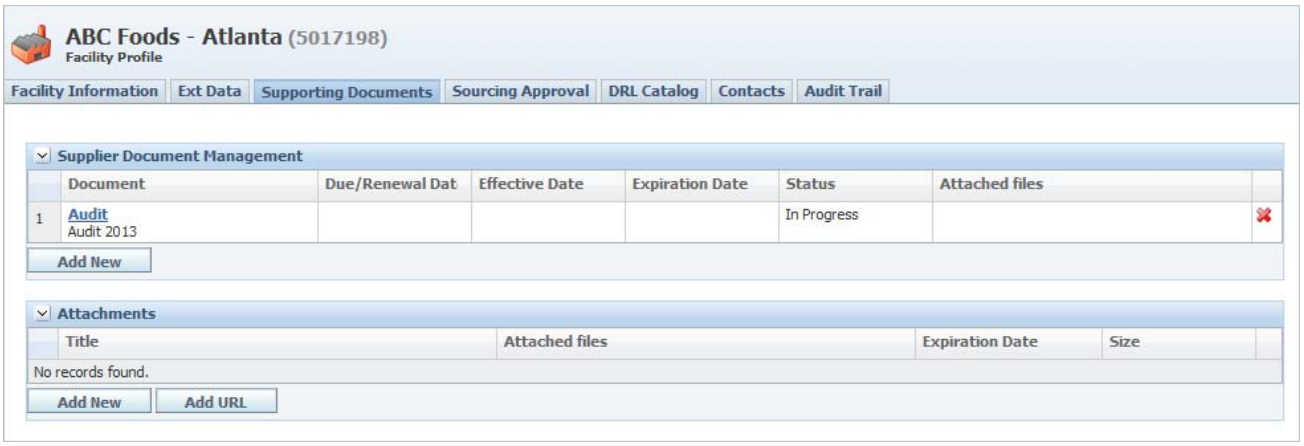
Use the Ext Data tab to enter extended attributes or custom sections for a facility. This tab is described in detail in the *Agile Product Lifecycle Management for Process Getting Started Guide*.

## Supporting Documents Tab

Use the Supporting Documents tab to store documents for a facility. You can also specify documents to be viewed by suppliers who are using the Supplier Portal. You must save a facility profile before you can add a supplier document or attachment. The Supporting Documents page, shown in Figure 2–16, consists of two sections:

- Supplier Document Management Section
- Attachments Section

***Figure 2–16 Supporting Documents page***




### Supplier Document Management Section

Refer to Chapter 4, "Supplier Document Management" for more detailed information on creating, editing, and managing supplier documents

### Attachments Section

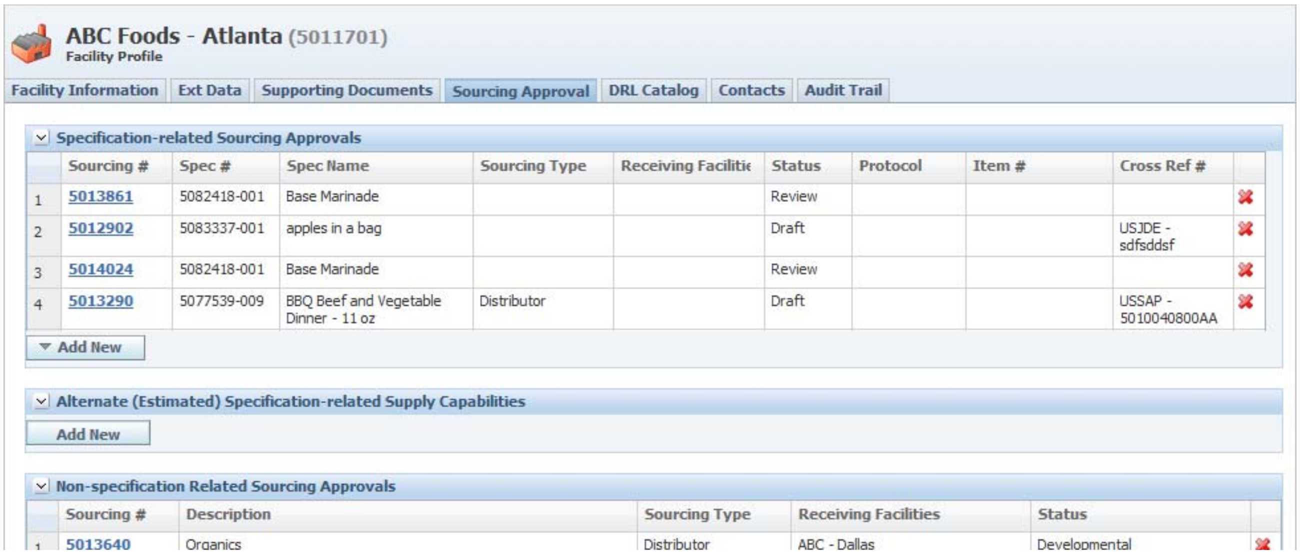
Use this section to add an attachment to the facility profile. Refer to "Adding an Attachment" on page 2-6 for detailed steps on attaching the document.

## Sourcing Approval Tab

Use the Sourcing Approval tab, shown in Figure 2–17, to add, delete, or modify sourcing approvals, depending on your permissions. Chapter 3, "Sourcing Approvals", gives detailed information about working with sourcing approvals.

You can add specification categories in the Alternate (Estimated) Specification related Supply Capabilities section. See "Creating an Alternate (Estimated) Specification-Related Supply Capability" on page 3-13 for instructions.

***Figure 2–17 Sourcing Approval page***




## DRL Catalog Tab

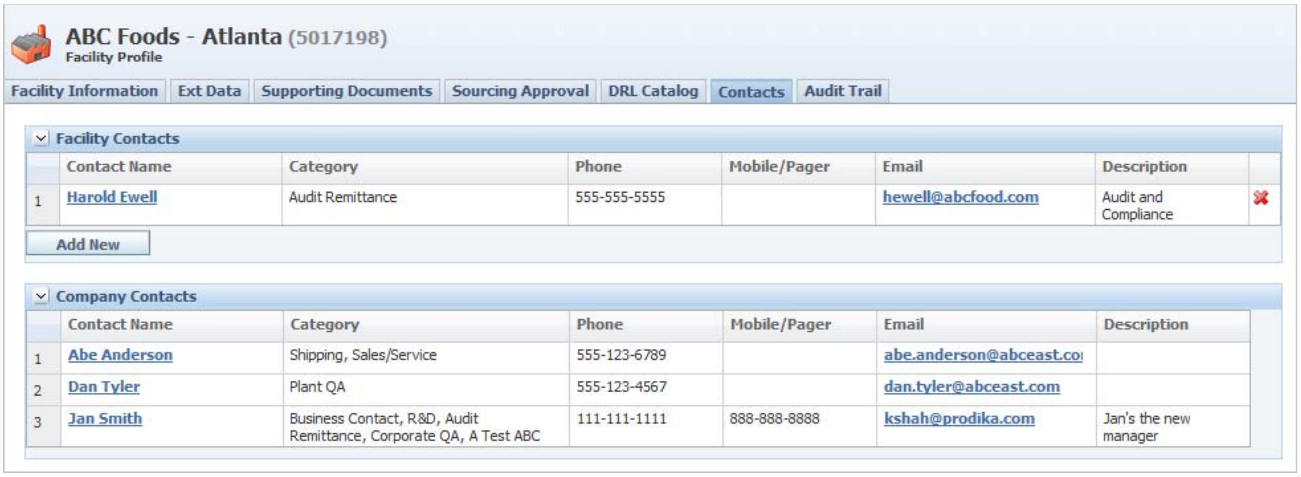
Use the DRL Catalog tab to reference DRL catalogs of documents. The catalogs listed here will be available to vendors via the Supplier Portal. Figure 2–18 shows the DRL Catalog tab:

***Figure 2–18 DRL Catalog tab***


## Contacts Tab

Use the Contacts tab, shown in Figure 2–19, to view contacts for the facility and parent company.

***Figure 2–19 Contacts tab***




### Facility Contacts Section

You can enter facility contacts using this section.

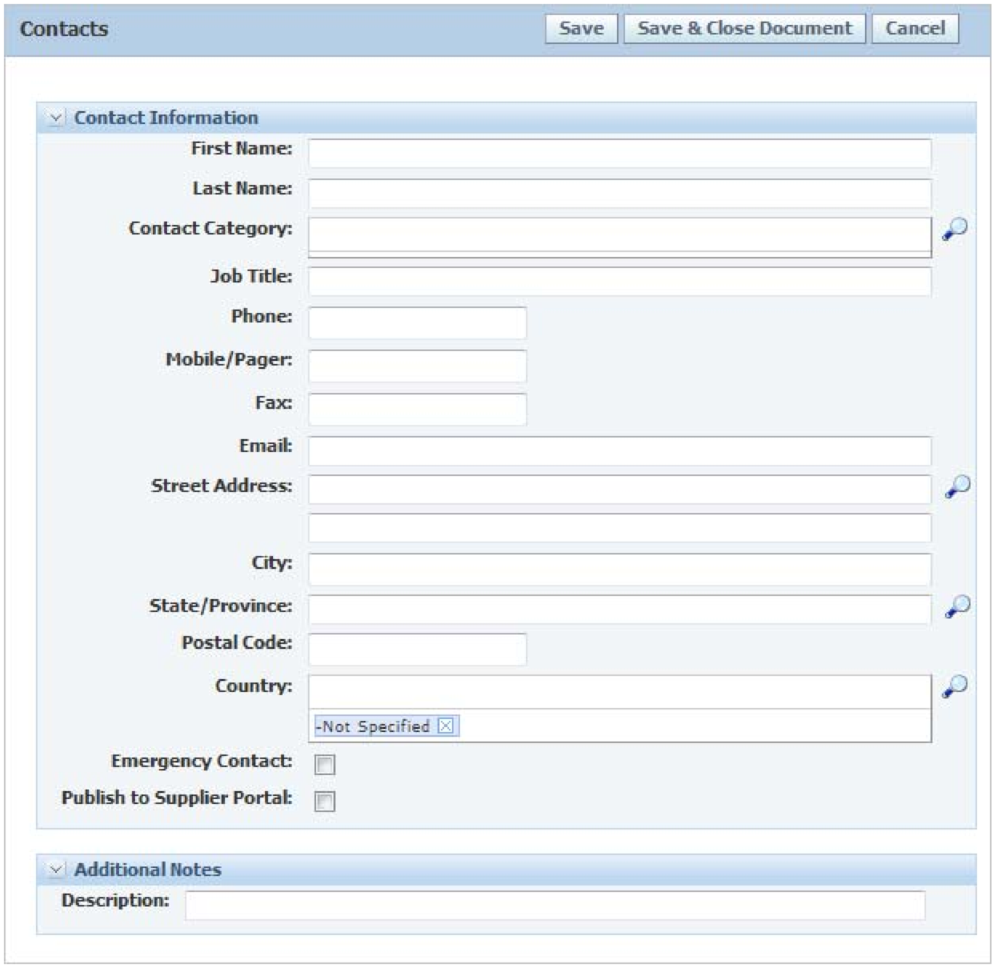
### Company Contacts Section

You can view and edit contacts added to the parent company using this section. This is a read only view of contacts are maintained on the company profile.

### Adding a Contact

After you have saved a facility profile, you can add facility contacts using the Contacts dialog box, shown in Figure 2–20. Contact information includes first and last name, job title, phone number, email, address and whether the contact is designated as an emergency contact. For steps on adding a contact, refer to "Adding a Contact" on page 2-10.

*Figure 2–20 Contacts dialog box*



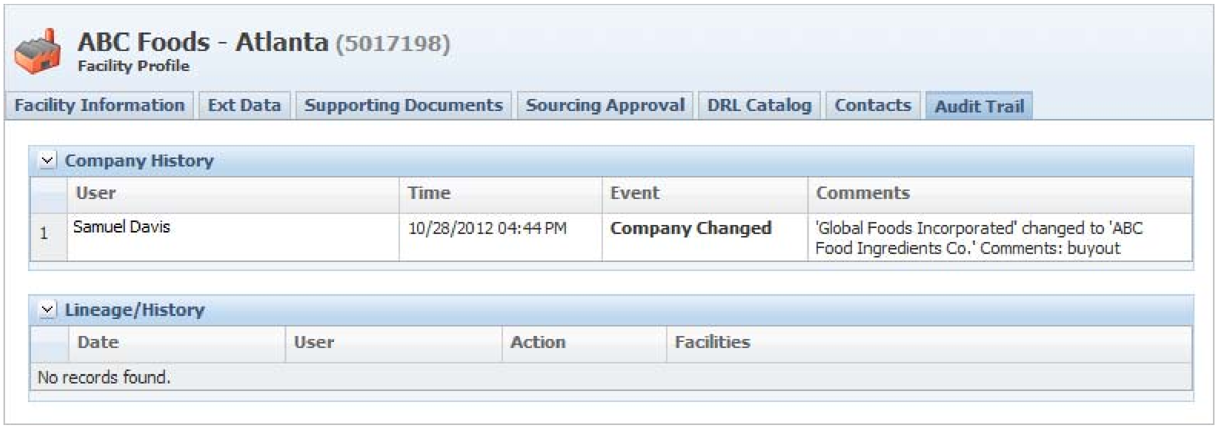

Click the import icon ( ) to import an existing address. When you select the icon, a dialog box is displayed that lists all available addresses for that company. The address you select populates these fields. This feature allows you to use an existing address versus repeatedly retyping the same address.

Check the **Publish to Supplier Portal** box to make the contact viewable in the Supplier Portal.

## Audit Trail Tab

Use the Audit Trail tab, shown in Figure 2–21, to view a record of company changes made to the facility profile as well as see how the facility was created.

***Figure 2–21 Audit Trail page***




### Company History Section

The Company History section displays any company reassignments made to that facility. You can reassign the facility to a new company using the Company Name field if you are assigned the [SCRM_FACILITY_RELOCATER] role. Refer to "Assigning a Facility to a Different Company" on page 2-21 for more information.

### Lineage/History Section

The Lineage/History section shows a history of how a facility was created and contains the following fields:

**Date**—Date and time the record was created.

**User**—User that created the record.

**Action**—The type of action that created this record:

- **Create New**—This record was created from blank.
- **Create New From Template**—This record was created from a template. The template is listed in the Facilities column.
- **Import From** (only available for specification-related sourcing approvals)—This record was created by importing existing specification-related sourcing approvals to a material in GSM.

**Facilities**—The corresponding object that was used based on the action performed. For example, when created from a template, the template used to create the record is listed.

## Saving the Facility Profile

Once you entered all data for the facility profile, click **Save & Close** from the action menu. You can also click the **Save & Close** action icon ( ).

# Assigning a Facility to a Different Company

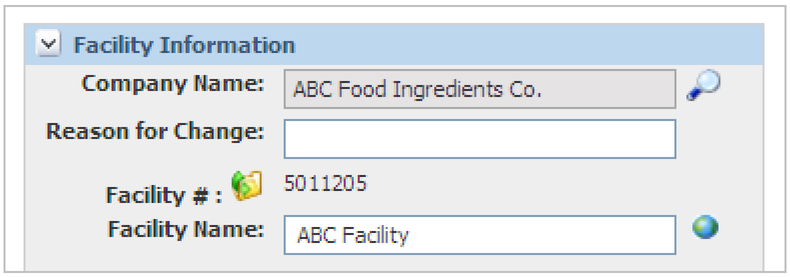
After saving a facility, users with the SCRM_FACILITY_RELOCATOR role can move the facility to a different company. All sourcing approvals tied to the facility will be moved.

## Moving a Facility

To move a facility:

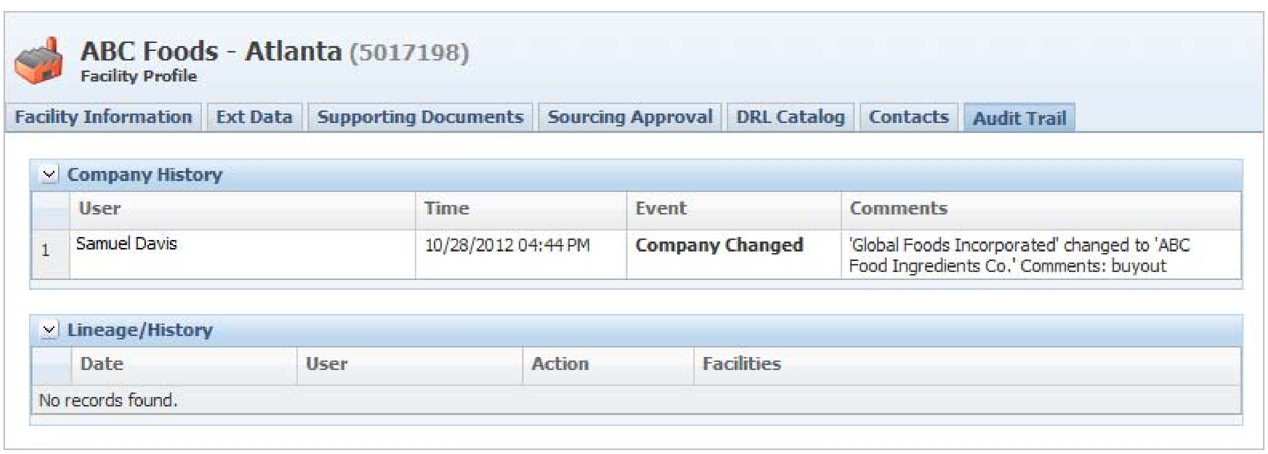
1. On the Facility Information tab, click the search icon ( ) at the end of the Company Name field. SCRM displays the company search page.
2. Search for and select the company you want to assign the facility to. The Reason for Change field is displayed, as seen in Figure 2–22.

***Figure 2–22 Reason for Change field***




3. Enter notes explaining why you are changing the company the facility is assigned to.
4. Click **Save**. The facility's Audit Trail tab will display when this change was made, what the previous company value was, who made this change and the reason for change comments, as Figure 2–23 shows.

***Figure 2–23 Audit Trail, Company History***



# 3 Sourcing Approvals

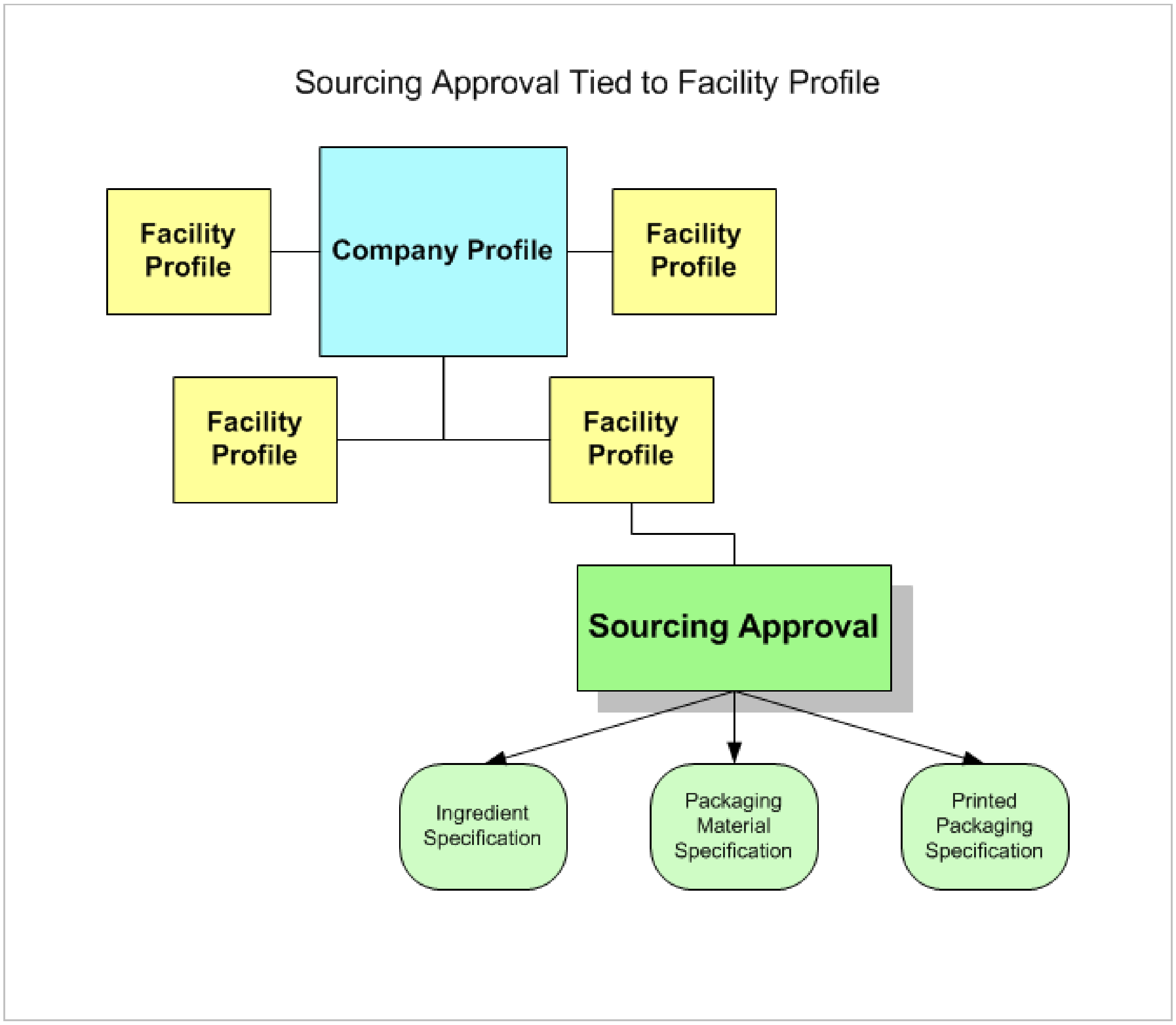
This chapter describes the types of sourcing approvals and discusses the steps involved in creating sourcing approvals. The topics covered include:

- Overview
- Accessing Sourcing Approvals
- Creating a Specification-Related Sourcing Approval
- Creating an Alternate (Estimated) Specification-Related Supply Capability
- Creating a Non-Specification Related Sourcing Approval
- Workflows and Sourcing Approvals

## Overview

A sourcing approval is a document that defines what will be supplied, who will supply it, and to whom it will be supplied. It describes the approval status among all facilities throughout the extended supply chain.

*Figure 3–1 A specification-related sourcing approval defines what specifications a facility is to supply*




## Types of Sourcing Approvals

Use Supply Chain Relationship Management (SCRM) to create the following types of sourcing approvals:

- **Specification-related sourcing approvals** — Sourcing approvals tied to specifications in Global Specification Management (GSM). The sourcing approval captures information about your company's relationship to the specification and its suppliers.
- **Non-specification related sourcing approvals** — Sourcing approvals unrelated to specifications within GSM, such as janitorial services.

## Accessing Sourcing Approvals

To view existing sourcing approvals in SCRM, you can either search for them from the Open action menu, shown in Figure 3–2, or from a facility.

***Figure 3–2 Sourcing Approval submenu***


Select from the following menu options:

- **Spec Related Sourcing Approval** — Displays a search page for specification related sourcing approvals.
- **Non-Spec Related Sourcing Approval** — Displays a search page for non-specification related sourcing approvals.

The sourcing approval search pages work like other search pages in Agile PLM for Process. For instructions on using the search page, see the *Agile Product Lifecycle Management for Process Getting Started Guide*.

---

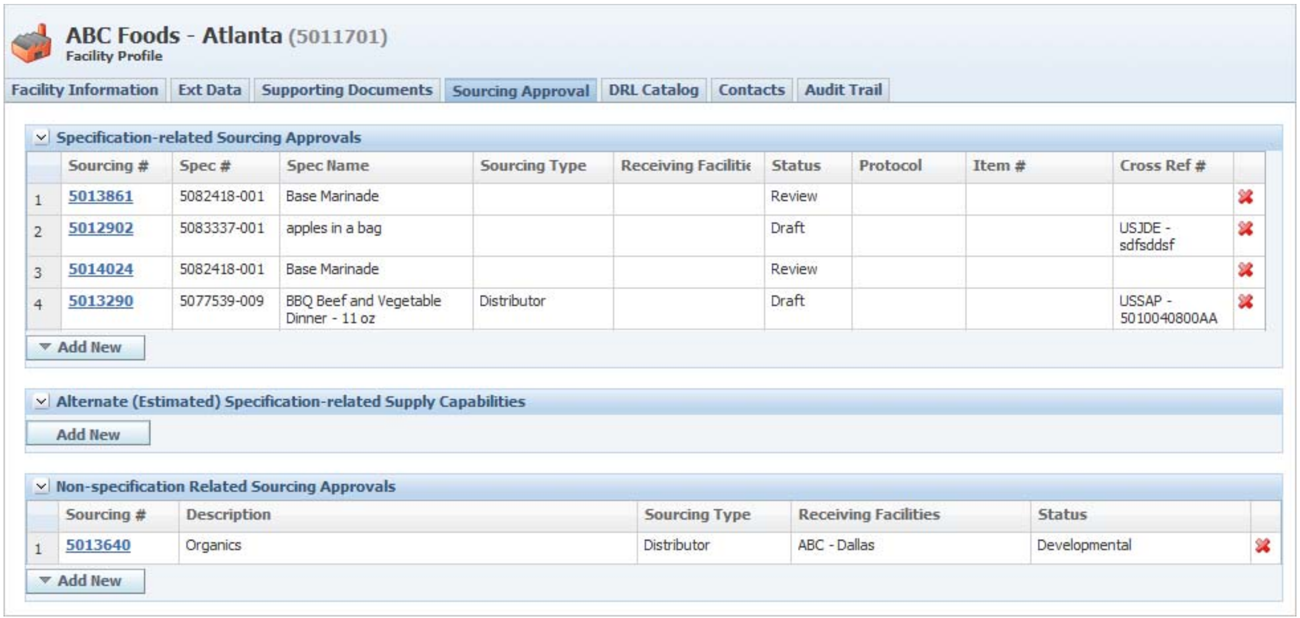
**Note:** Depending on your configuration, there are security limitations around sourcing approvals. Only the sourcing approvals users have access to will be made available to them.

---

To select a sourcing approval from a facility, first select the facility. From the facility profile, click the Sourcing Approval tab. This tab contains the following three sections, as Figure 3–3 shows:

- Specification-related Sourcing Approvals Section
- Alternate (Estimated) Specification-related Supply Capabilities Section
- Non-specification Related Sourcing Approvals Section

***Figure 3–3 Sourcing Approval tab within a facility profile***




### Specification-related Sourcing Approvals Section

The Specification-related Sourcing Approvals section displays the following information:

**Sourcing Number**—The system-assigned number for the sourcing approval

**Spec #**— The system-assigned specification number for the item being sourced

**Spec Name** — The name of the specification

**Sourcing Type** — The type of sourcing relationship

**Receiving Facilities** — The names of the receiving facilities

**Sourcing Approval Status** — The workflow status of the sourcing approval

**Protocol** — Can help categorize the nature of the sourcing relationship

**Item #** — The item number assigned to the sourcing approval in the supplier's facility

**Cross Ref #** — The cross references assigned to the sourcing approval.

---

**Note:** If no cross reference is assigned to the sourcing approval, this field displays the preferred cross reference set by the user for GSM in Profile and Preference.

---

### Alternate (Estimated) Specification-related Supply Capabilities Section

This section, shown in Figure 3–4, references the alternate capabilities of the supplier. For example, if your supplier supplies you with chili powder but could also supply you with pepper and salt, you would indicate that here using specification categories.

The category you add is consolidated with all other alternate capabilities for this facility and is displayed on the company profile's Supply Categories tab in the Potential Specification Supply Categories section. Refer to "Supply Categories Tab" on page 2-8 for more information.

*Figure 3–4 Alternate (Estimated) Specification-related Supply Capabilities section*


### Non-specification Related Sourcing Approvals Section

The Non-specification Related Sourcing Approvals section, shown in Figure 3–5, displays the following information:

**Sourcing Number**—The system-assigned number for the sourcing approval

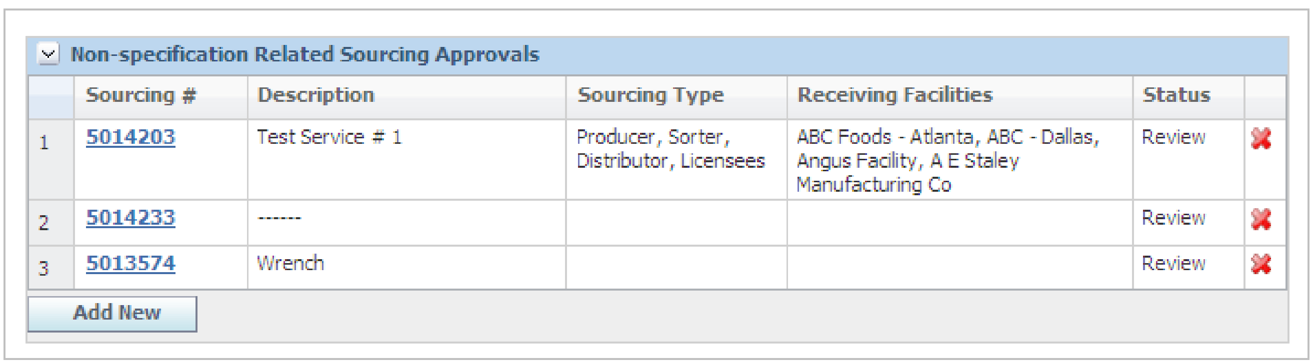
**Description** — The description of the item or service provided by the facility

**Sourcing Type** — They type of sourcing relationship

**Receiving Facilities** — The names of the receiving facilities

**Sourcing Approval Status** — The workflow status of the sourcing approval

*Figure 3–5 Non-specification Related Sourcing Approvals section*



Non-specification Related Sourcing Approvals

| | Sourcing # | Description | Sourcing Type | Receiving Facilities | Status | |
|---|---|---|---|---|---|---|
| 1 | 5014203 | Test Service # 1 | Producer, Sorter, Distributor, Licensees | ABC Foods - Atlanta, ABC - Dallas, Angus Facility, A E Staley Manufacturing Co | Review | |
| 2 | 5014233 | ------ | | | Review | |
| 3 | 5013574 | Wrench | | | Review | |

Add New

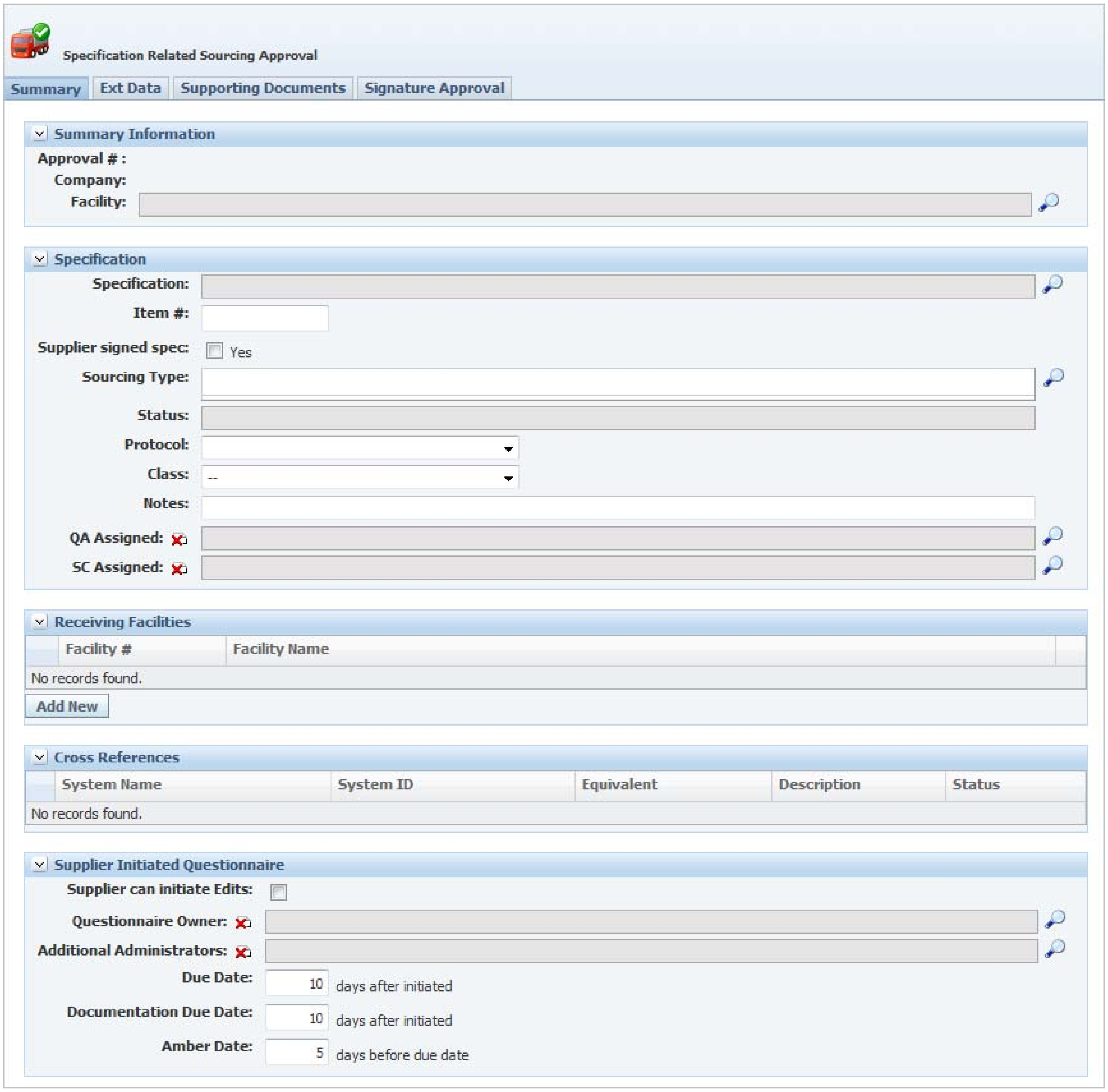
## Creating a Specification-Related Sourcing Approval

To add a specification-related sourcing approval:

1. From the Sourcing Approval tab in a facility profile, click **Add New > Blank** or **Add New > From Template**, or
2. In the action menu, click **New > Spec Related Sourcing Approval > Blank** or **New > Spec Related Sourcing Approval > From Template**.

   Supply Chain Relationship Management displays the Specification Related Sourcing Approval page, as shown in Figure 3–6.

*Figure 3–6 Specification Related Sourcing Approval page*




This page consists of four tabs arranged across the top of the page:

- Summary
- Ext Data
- Supporting Documents
- Signature Approval

3. If you created the sourcing approval from a facility, the Facility field is already populated. If you created the sourcing approval from the New option on the action menu, you must assign a facility. Click the search icon ( ), and then select a facility using the search page.

4. Make entries in fields in the Specification section, as detailed below:

**Specification—**Select the specification using the search icon ( ). The specification name and number are displayed, indicating the sourcing approval is linked to the specification. This is a required field.

**Assigned Reference—**This field is shown after a specification is selected. Use this field to select the specification cross reference(s) that directly relate to this sourcing approval.

**Item #—**Enter the supplier number for this specification.

**Supplier signed spec—**Check the box if the supplier has agreed to the specification. When you check the box, a text entry field displays. Enter the name of the supplier representative that signed off, then click the date field at the end of the entry field to choose the date that the supplier's approval was received. If enacting supplier electronic signature, this box will be checked automatically when a supplier signs off on a specification. To learn more about supplier electronic signature, refer to the *Agile Product Lifecycle Management for Process Supplier Portal User Guide*.

**Sourcing Type—**Select the type of sourcing relationship. You can make multiple selections.

**Status—**The workflow status of the sourcing approval. This is assigned by the system.

**Protocol—**Select a protocol ID from the drop-down list.

**Class—**Select a class from the drop-down list.

**Notes—**Enter any notes.

**QA Assigned—**Select the name of a quality assurance auditor assigned to this facility. You can select multiple names.

**SC Assigned—**Select the name of the supply chain representative responsible for the relationship with the supplier. You can select multiple names.

5. The Receiving Facilities section displays the receiving facilities for the material. To add a receiving facility, click **Add New** and use the facility search page to select a facility.
6. The Cross References section displays the linked specification's cross references.
7. The Supplier Initiated Questionnaire section, shown in Figure 3–6, displays details of the eQ questionnaire tied to the sourcing approval. Complete this section to designate if the supplier is allowed to initiate questionnaires in Supplier Portal. For more information on supplier initiated questionnaires, refer to the *Agile Product Lifecycle Management for Process Supplier Portal User Guide*.

> **Note:** This section will not appear on the sourcing approval if the supplier-initiated questionnaire feature is not configured on.

8. Make entries in the following fields:

**Supplier can initiate Edits —** Select the checkbox if the supplier can initiate edits to the specification. If selected, the supplier will see the Submit Changes supplier action in Supplier Portal.

**Questionnaire Owner —** Select who will be the owner of the questionnaire if the supplier initiates one. Click the field label to display a UGM user search page. You can select only one owner.

**Additional Administrators** — Select the users or groups who will be the additional administrators of the questionnaire. Click the field label to display a UGM user and group search page. You can select multiple administrators.

**Due Date** — Enter the number of days after the supplier initiates the questionnaire that it is due.

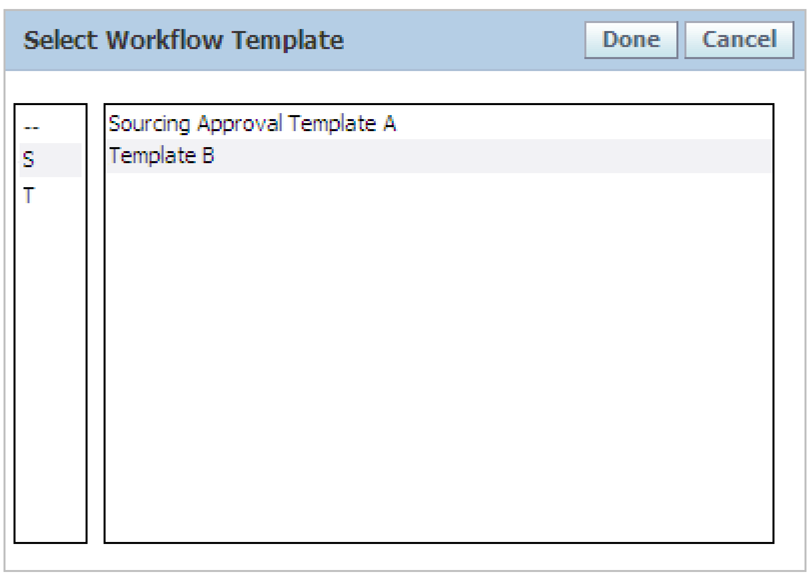
**Documentation Due Date** — Enter the number of days after the supplier initiates the questionnaire that supporting documentation is due.

**Amber Date** — Enter the number of days prior to the Due Date when the questionnaire becomes flagged as amber.

For more information on supplier-initiated questionnaires, refer to the *Agile Product Lifecycle Management for Process eQuestionnaire User Guide* and the *Agile Product Lifecycle Management for Process Supplier Portal User Guide*.

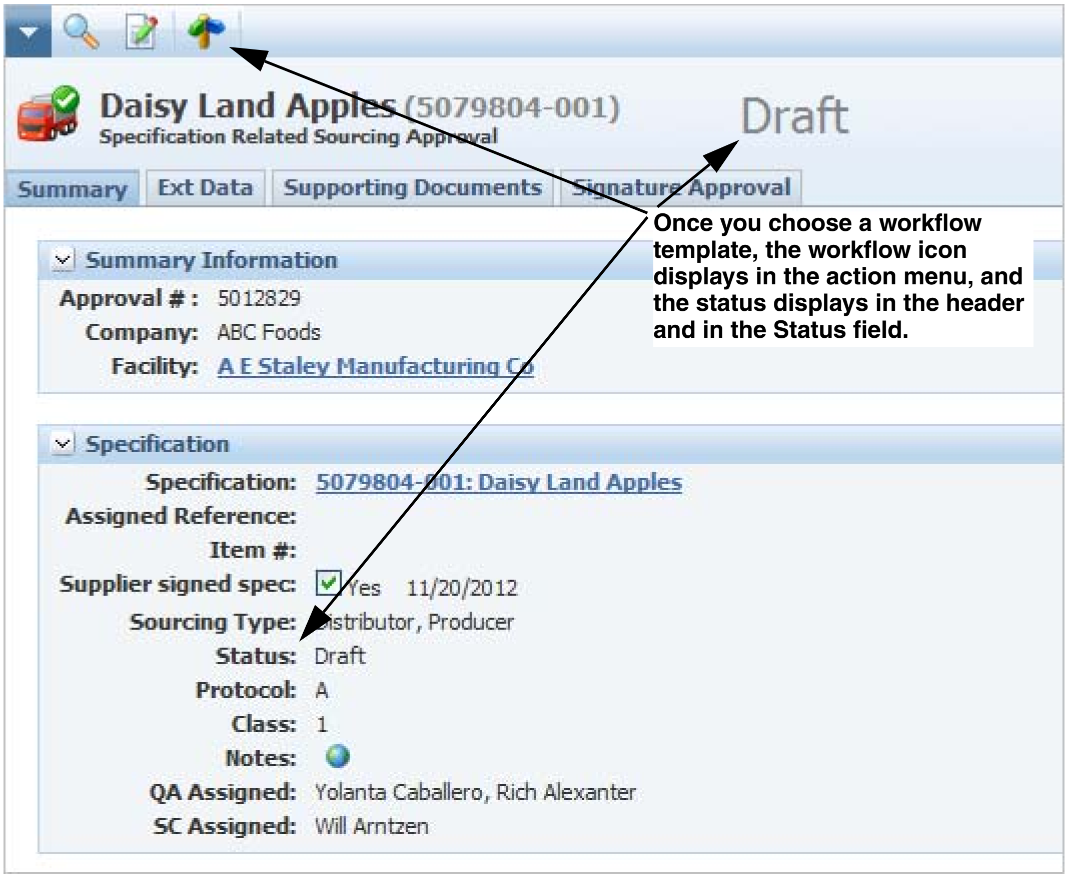
9. Click **Save**. You can use the other tabs to complete the sourcing approval. All sourcing approvals will be tied to a workflow. In some cases, when the sourcing approval resolves to multiple workflow templates, you will need to select the workflow template from the available options. For more detailed information on workflows, refer to "Workflows and Sourcing Approvals" on page 3-16.
10. Select a template to tie this approval to from the Select Workflow Template dialog box, shown in Figure 3–7, then click **Done**.

***Figure 3–7 Select Workflow Template dialog box***




11. Click **Save**. Figure 3–8 shows the sourcing approval tied to the workflow.

*Figure 3–8 Sourcing approval now tied to a workflow*




---

**Warning: A workflow is tied to a sourcing approval when you first save the sourcing approval. Once you select a workflow template, you will not be asked to define this again. If you need to tie the sourcing approval to another workflow template, you will need to use the Resolve Workflow button (available with user role [CAN_ RERESOLVE_WORKFLOWS_SCRM]).**

---

The system assigns a sourcing approval status based on the workflow template you chose. Refer to "Workflows and Sourcing Approvals" on page 3-16 for more information on workflows.

## Ext Data Tab

Use the Ext Data tab to enter extended attributes or custom sections for a sourcing approval. This tab is described in detail in the *Agile Product Lifecycle Management for Process Getting Started Guide*.

## Supporting Documents Tab

Use the Supporting Documents page to store documents for sourcing approvals. You can also specify attachments to be viewed by suppliers who are using the Supplier Portal. The Supporting Documents page consists of two sections, and is shown in Figure 3–9.

- Supplier Document Management Section
- Attachments Section

---

**Note:** Supplier Portal does not display supplier documents assigned to a sourcing approval. However, it does display attachments assigned to a sourcing approval through the attachments section.

---

***Figure 3–9 Supporting Documents tab***


### Supplier Document Management Section

Refer to Chapter 4, "Supplier Document Management" for more detailed information on creating, editing, and managing supplier documents.

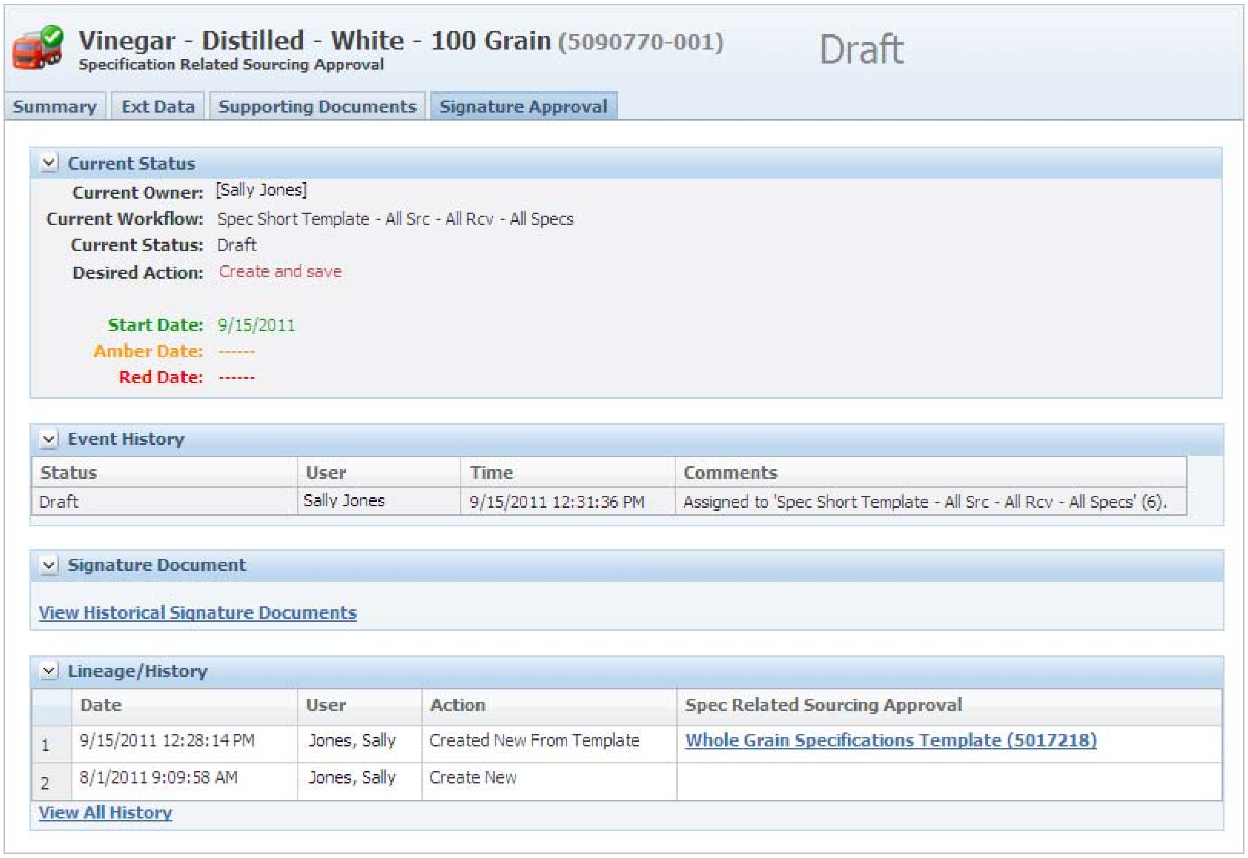
### Attachments Section

Use this section to add an attachment or URL to the sourcing approval. For detailed instructions, see "Adding an Attachment" on page 2-6 and "Adding a URL" on page 2-7.

## Signature Approval Tab

Use the Signature Approval tab to view the workflow step that the sourcing approval is in, as well as workflow event history. Figure 3–10 shows the tab.

***Figure 3–10 Signature Approval tab***




This tab consists of the following sections:

Current Status Section — Snapshot view of the sourcing approval's workflow summary

Event History Section — Listing of all actions taken for this sourcing approval

Signature Documents Section — Listing of all signature documents

Lineage/History Section — Historical listing of how and when a sourcing approval was created.

### Current Status Section

The following fields reside in the Current Status section:

**Current Owner** — The name of the persons responsible for managing the current step in the sourcing approval. When the sourcing approval is in 'Draft' status, the originator is displayed.

**Current Workflow** — The workflow that the sourcing approval has resolved to

**Current Status** — The current status of the sourcing approval

**Desired Action** — The recommended action based on the instructions from the workflow step

**Start Date** — The date that the current step was assigned to the owner

**Amber Date** — The date that a reminder will be issued to the owner indicating a deadline is approaching

**Red Date** — The date that the current workflow task is due

### Event History Section

The Event History section displays the current and past steps within the sourcing approval process. Each step status is displayed along with the name of the user who transitioned the workflow, the date that the workflow was transitioned, and any related comments. The most recent transitions are displayed first.

### Signature Documents Section

The Signature Documents section lists all signature documents assigned to this sourcing approval. See "Working with a Signature Document" on page 3-18 for more information on signature documents.

### Lineage/History Section

The Lineage/History section shows a history of how a specification-related sourcing approval was created and contains the following fields:

**Date**—Date and time the record was created.

**User**—User that created the record.

**Action**—The type of action that created this record:

- **Create New**—This record was created from blank.
- **Create New From Template**—This record was created from a template. The template is listed in the Spec Related Sourcing Approval column.
- **Import From** (only available for specification-related sourcing approvals)—This record was created by importing existing specification-related sourcing approvals to a material in GSM.

**Spec Related Sourcing Approval**—The corresponding object that was used based on the action performed. For example, when created from a template, the template used to create the record is listed.

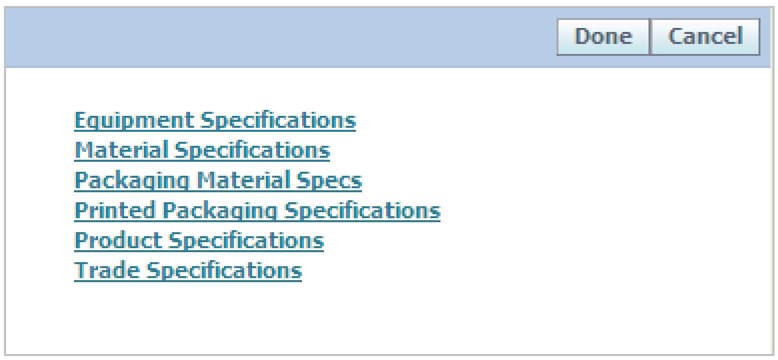
## Creating an Alternate (Estimated) Specification-Related Supply Capability

Use this feature to track alternate specification categories that an existing company or facility provides but does not currently supply to your organization.

To add an alternate specification-related sourcing approval:

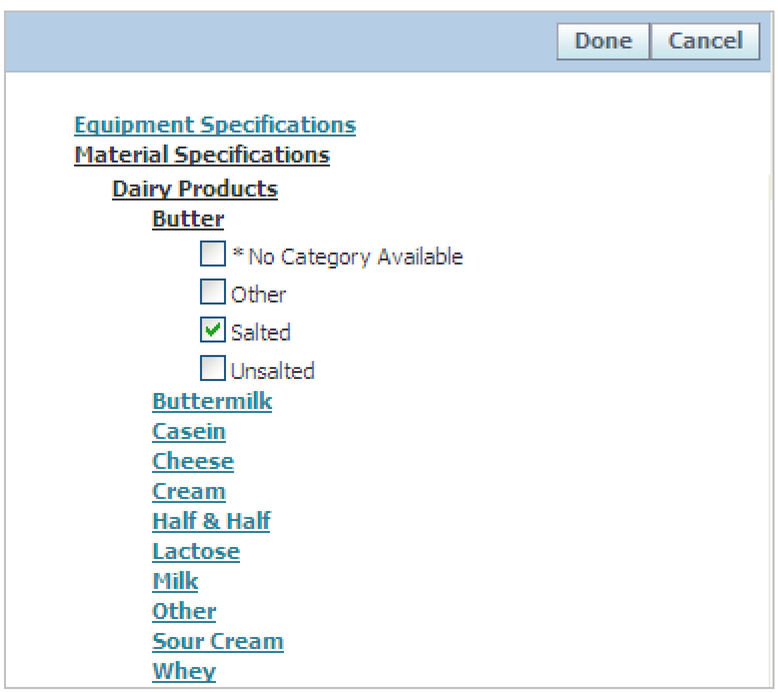
1. Select a facility using the search page.
2. Select the Sourcing Approval tab.
3. Click **Edit** in the action menu. The Sourcing Approval tab displays in edit mode.
4. Under the Alternate (Estimated) Specification-related Supply Capabilities section, click **Add New**. A dialog box displays specification categories, as shown in Figure 3–11.

***Figure 3–11 Specification categories dialog box***



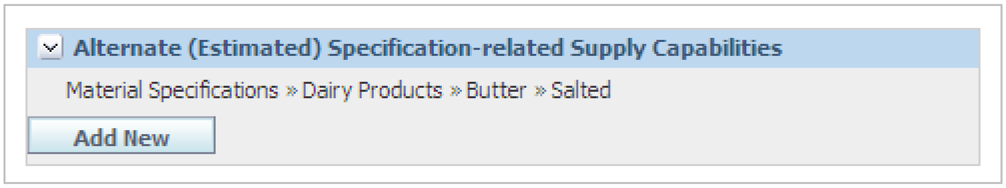

5. Click a specification type to expand the listing, then check the checkbox next to the chosen specification category, as shown in Figure 3–12.

***Figure 3–12 Expanded specifications dialog box***



6. Click **Done**. The specification category that you defined displays under the Alternate (Estimated) Specification-related Supply Capabilities section as shown in Figure 3–13.

***Figure 3–13 Added alternate specification type***




7. Click **Save**. The record is now tied to the sourcing approval. This information will be displayed in the Potential Specification Supply Categories section on the company profile’s Supply Categories tab. See "Supply Categories Tab" on page 2-8 for more information.

> **Note:** You can later search for the record using “alternate supply capability” as your search criteria.

## Creating a Non-Specification Related Sourcing Approval

To create a non-specification related sourcing approval, follow steps similar to creating a specification-related sourcing approval.

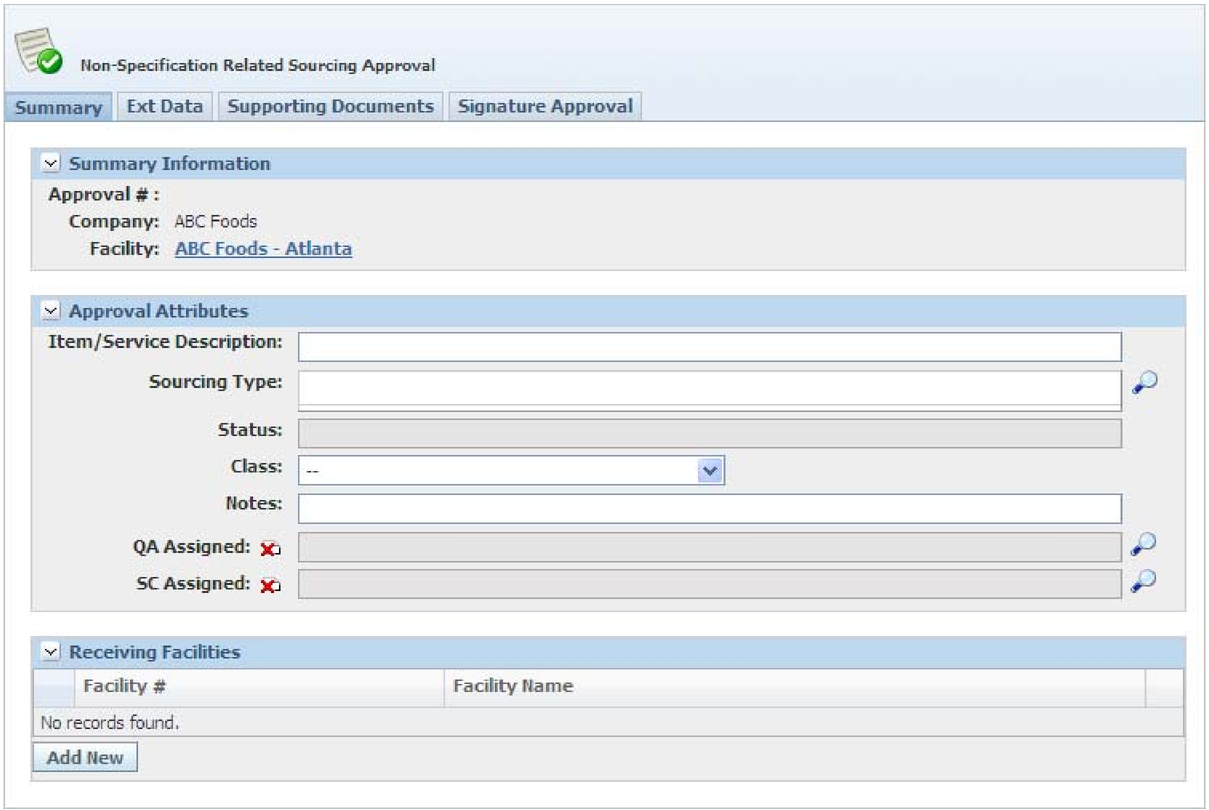
To add a new non-specification related sourcing approval:

1. In the action menu, click **New >Non Spec Related Sourcing Approval > Blank** or **New > Non Spec Related Sourcing Approval > From Template**. SCRM displays a blank Non Specification-Related Sourcing Approval page.
2. In the **Facility** field, use the search icon ( ) to assign a facility. The company the facility is assigned to displays in the **Company** field. Continue with step 2 below.

   Or

1. From the Sourcing Approval tab in a facility, click **Add New > Blank** or **Add New > From Template** below Non-Specification Related Sourcing Approvals section. SCRM displays a Non Specification-Related Sourcing Approval page, as shown in Figure 3–14.

*Figure 3–14 Non Specification-Related Sourcing Approval page*




2. In the Approval Attributes section, make entries in the following fields:

   **Item/Service Description** — Enter a detailed description of the item or service. This is a required field.

   **Sourcing Type** — Select the type of sourcing relationship from the list in the pop-up dialog box. You can make multiple selections.

   **Sourcing Approval Status** — Assigned by the system. The workflow status of the sourcing approval.

   **Class** — Select a class from the drop-down list.

   **Notes** — Enter any notes.

   **QA Assigned** — Select the name of a quality assurance auditor assigned to this facility. You can select multiple names.

   **SC Assigned** — Select the name of the supply chain representative responsible for the relationship with the supplier. You can select multiple names.

   > **Note:** It is important to enter a detailed description in the Item/Service Description field. Doing so will make it easier to locate the record if you ever need to search for the sourcing approval by description.

3. In the Receiving Facilities section, to add a receiving facility, click **Add New** and use the facility search page to select a facility.

4. Use the remaining sourcing approval tabs to add more information:
   - Ext Data
   - Supporting Documents
   - Signature Approval
5. Click **Save**. See "Transitioning a Workflow" on page 3-19 for more information.

## Workflows and Sourcing Approvals

You can use SCRM to obtain supplier approval at the facility and specification level through workflow automation.

Workflows represent business practices and processes used by your company. You create workflows using the Workflow Administration (WFA) application. Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information.

### Managing Sourcing Approvals

You manage sourcing approvals using signature documents and workflows. Get to your sourcing approvals and signature documents by:

- Using your Action Items list
- Clicking a link that is emailed to you (for signature documents only)

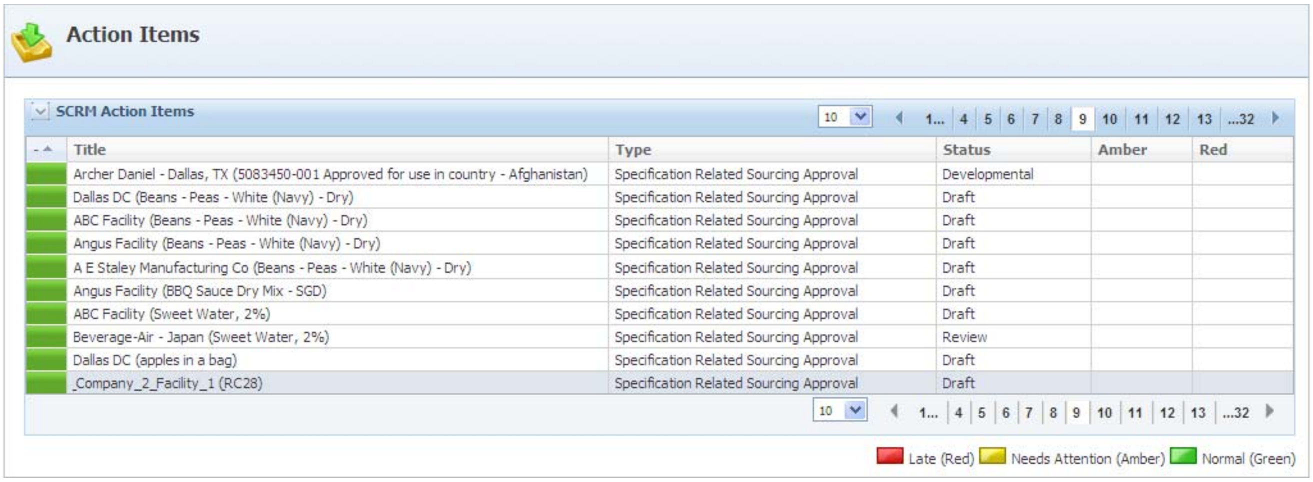
### Using Action Items

As a sourcing approval moves through the workflow process, action items generate for designated team members. Each owner of subsequent steps will receive the item (sourcing approval or signature document) in his or her Action Items list, as Figure 3–15 shows. Signature requestees will also be alerted via email.

The Action Items page displays when you select Action Items from the SCRM menu. Action items are workflow items assigned to you that require your attention — think of them as your "To Do" list. Action items indicate that review or a signature document is required before the document can progress to the next step.

As you take appropriate action for each item assigned to you, the item's status updates, and the item progresses to the next step in the workflow. It remains in your Action Items list as long as you are the "owner" of the current step in the workflow.

*Figure 3–15 Action Items list*




| Title | Type | Status | Amber | Red |
|---|---|---|---|---|
| Archer Daniel - Dallas, TX (5083450-001 Approved for use in country - Afghanistan) | Specification Related Sourcing Approval | Developmental | | |
| Dallas DC (Beans - Peas - White (Navy) - Dry) | Specification Related Sourcing Approval | Draft | | |
| ABC Facility (Beans - Peas - White (Navy) - Dry) | Specification Related Sourcing Approval | Draft | | |
| Angus Facility (Beans - Peas - White (Navy) - Dry) | Specification Related Sourcing Approval | Draft | | |
| A E Staley Manufacturing Co (Beans - Peas - White (Navy) - Dry) | Specification Related Sourcing Approval | Draft | | |
| Angus Facility (BBQ Sauce Dry Mix - SGD) | Specification Related Sourcing Approval | Draft | | |
| ABC Facility (Sweet Water, 2%) | Specification Related Sourcing Approval | Draft | | |
| Beverage-Air - Japan (Sweet Water, 2%) | Specification Related Sourcing Approval | Review | | |
| Dallas DC (apples in a bag) | Specification Related Sourcing Approval | Draft | | |
| _Company_2_Facility_1 (RC28) | Specification Related Sourcing Approval | Draft | | |

Each row in the SCRM Action Items table gives more information about the item in the workflow, as described below:

**Title** — The name of action item.

- For specification-related sourcing approvals, it consists of the name of the facility and specification.
- For non-specification-related sourcing approvals, it consists of the facility name.
- For signature documents, it consists of the name of the facility and specification (if applicable)
- For specification or non-specification-related sourcing approval templates or their signature document, it consists of the name of the template.

**Type** — The type of action item. Types are:

- Specification-related sourcing approval
- Non-specification related sourcing approval
- Signature document
- Specification-related sourcing approval template
- Non-specification-related sourcing approval template

**Status** — The step of the workflow that the item is in.

**RAG/SLA** — RAG indicates Red, Amber, or Green. This field is an indicator of compliance with the established service level agreement (SLA) time lines for that document type:

- Red—Late
- Amber—Needs Attention
- Green—Normal

Amber and red dates display to the right of the color indicator for signature document action items.

## Working with a Signature Document

When you select a signature document as an action item or through an email link, the signature document page displays, as shown in Figure 3–16.

***Figure 3–16 Signature document page***


The Summary tab shows links to the sourcing approval, the source facility, and the receiving facility. You can click the links to view or edit the sourcing information, depending on your workflow permissions.

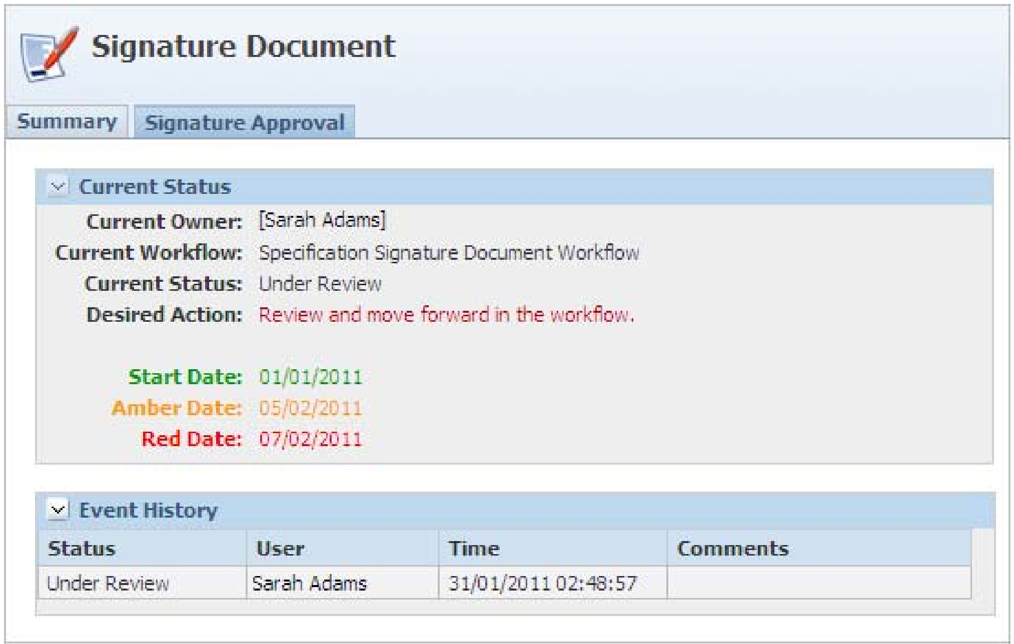
---

**Note:** If the signature document is generated from a specification-related sourcing approval or a non-specification-related sourcing approval template, the Summary tab only shows links to the sourcing approval templates.

---

As Figure 3–17 shows, the Signature Approval tab shows the current status and owner of the signature document, the desired action, assigned dates, and a history of signatures.

*Figure 3–17 Signature Approval tab*




Click **Workflow** from the action menu to take action on the signature document, either by advancing it to the next step or sending it back to the prior step.

For a sourcing approval with outstanding signature requests, you can now workflow the sourcing approval to a prior step. You do not have to wait for all signature requests to be approved or disapproved.

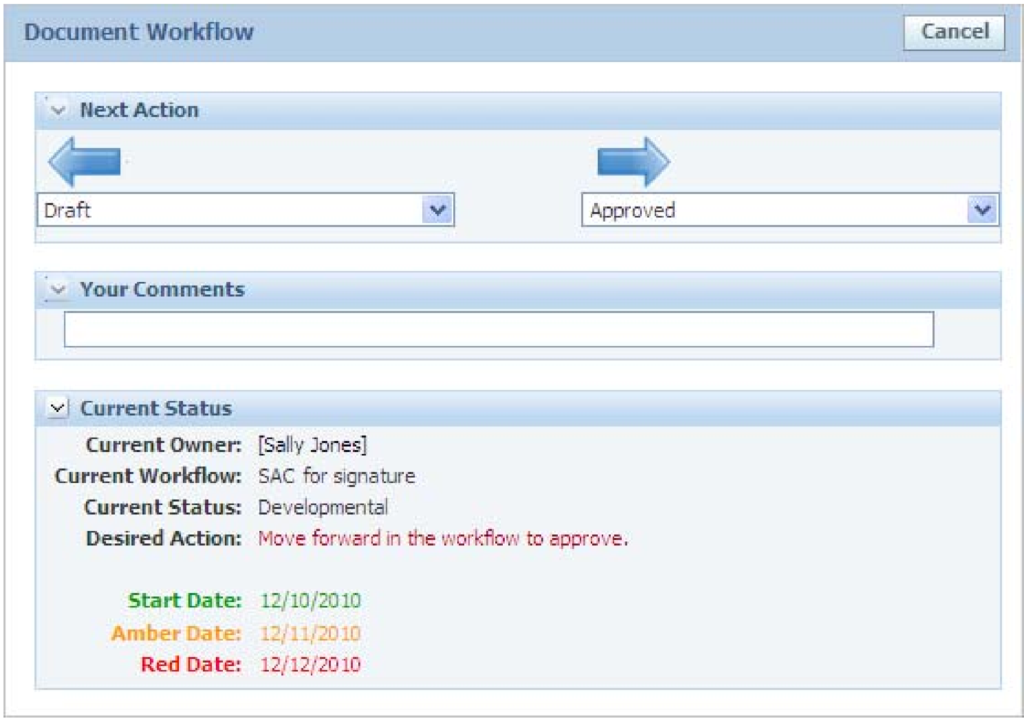
## Transitioning a Workflow

Within a sourcing approval or signature document, you can use the workflow button to transition the workflow.

To transition a workflow:

1. Click **Workflow** from the action menu. The Document Workflow dialog box displays, as shown in Figure 3–18. Remember that the buttons and fields that display vary based on the workflow and current workflow step.

***Figure 3–18 Document Workflow dialog box***




2. Enter comments in the **Your Comments** field (required).
3. Select a step from the action drop-down list.
4. Click the move step forward icon (  ) to forward the sourcing approval or signature document to the next step in the approval process, or click the move step back icon (  ) to return to a prior step. The system updates the workflow status based on your selection.

## Selecting Workflow Participants

If the move step forward icon includes people, you may have to select a person such as an owner, signature requestee, or notifee, in the next dialog box. The dialog box may contain preselected data, or it may prompt you to select one or multiple participants, depending on how the workflow has been set up. You may need to select participants from multiple dialog boxes. Refer to the figure below for an example of selecting workflow participants.

***Figure 3–19 Select signature requestees using checkboxes***


### Re-Authentication

Depending on workflow configurations, you are sometimes asked to re-authenticate while workflowing a sourcing approval. You will be asked to enter a passphrase to prove your identity. Your passphrase is managed through profile and preferences. For more information, refer to the *Agile Product Lifecycle Management for Process Getting Started Guide*.

# 4 Supplier Document Management

This chapter explains the Supplier Document Management feature. The topics covered include:



## Overview

Use the Supplier Document Management feature to manage documents related to companies, facilities, and sourcing relationships. Supplier documents can be attached to:

- Company profiles
- Facility profiles
- Specification-related sourcing approvals
- Non-specification related sourcing approvals

A supplier document is a collection of attachments with corresponding data that allows for easier managing, searching, and reporting against the documents. A supplier document includes the following:

- Name of the parent object (company, facility, or sourcing approval)
- Document type
- Document status
- Description
- Originator
- Due/renewal date
- Effective date
- Expiration date

Supplier documents are created on the company or facility profile or on the sourcing approval. Once they are created, supplier documents can be searched and edited from the left navigation panel in Supply Chain Relationship Management (SCRM).

## Publishing to Supplier Portal

Each attachment can be marked to publish to the Supplier Portal. When a supplier document contains an attachment that is published to the Supplier Portal, the document type, document description, title and filename of the attachment are shown to the supplier. Suppliers are able to download the attachment.

Suppliers can access the supplier documents by selecting **Specifications & Documents** from the Supplier Portal home page.

Only supplier documents attached to company and facility profiles are available through the Supplier Portal Documents section. Supplier documents attached to sourcing approvals will not be available through the Supplier Portal; only sourcing approval attachments are available. Figure 4–1 shows company and facility supplier documents. Figure 4–2 shows sourcing approval attachments.

***Figure 4–1 Supplier Portal Documents tab listing company and facility supporting documents***

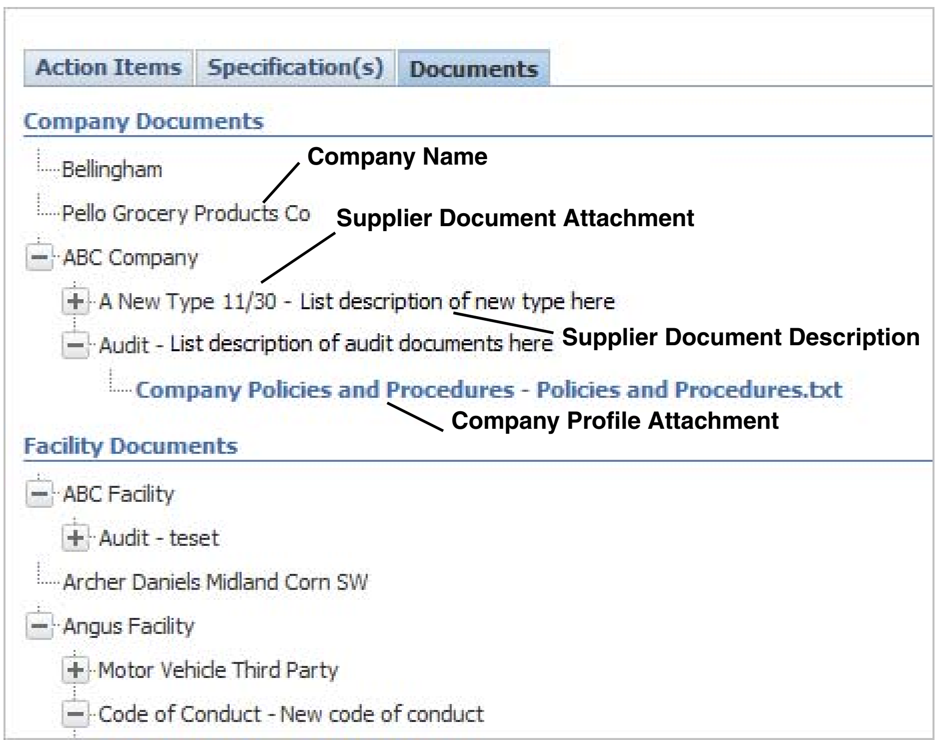
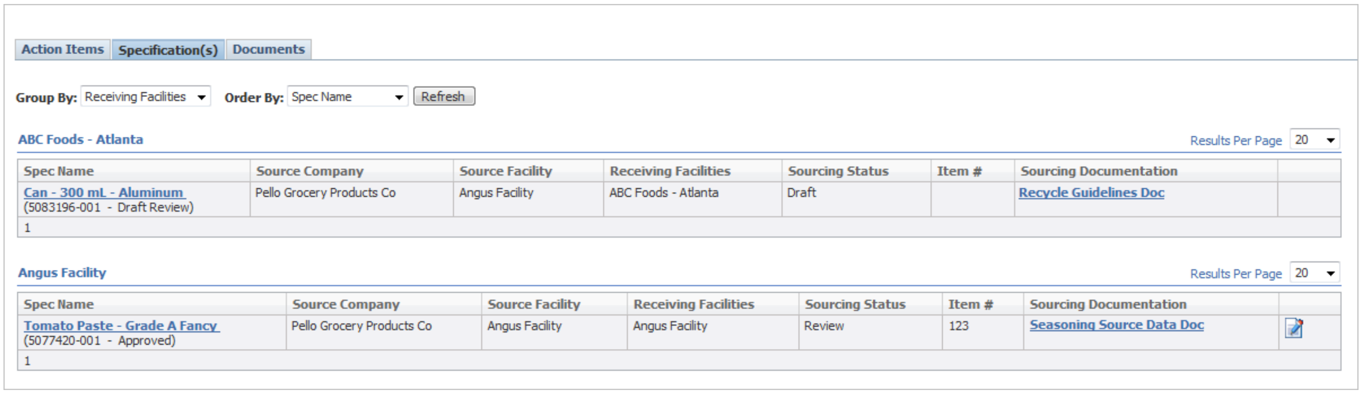


***Figure 4–2 Supplier Portal Specifications tab listing sourcing approval attachments***



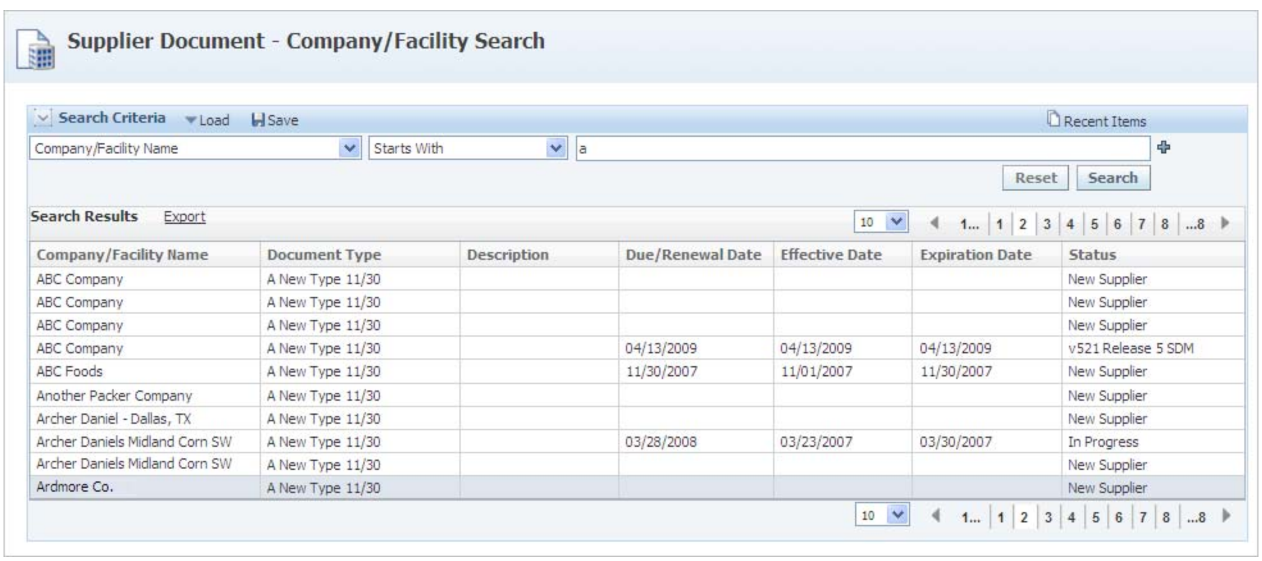

# Searching for Supplier Documents

Using the Supplier Document Management feature, you can search for supplier documents tied to a company or facility profile, a specification-related sourcing approval, or a non-specification-related sourcing approval. These choices are represented in the left navigation panel, in the Applications menu, and in the action menu in SCRM.

To search for a supplier document:

1. Select an SDM search option from the navigation panel, Applications menu, or action menu.
2. Enter criteria in the search fields, then click **Search**. The Search Results table lists all supplier documents meeting the criteria you specified, as Figure 4–3 shows.

***Figure 4–3 Returned supplier documents***




3. View a particular document by clicking anywhere in the row. The Supplier Document Management page displays the supplier document, as Figure 4–4 shows.

*Figure 4–4 Supplier Document Management page*


## Adding Supplier Documents

Supplier documents can only be created on the business object (company profile, facility profile, or sourcing approval). Supplier documents cannot be created on the business object template (company template, facility template, sourcing approval template).

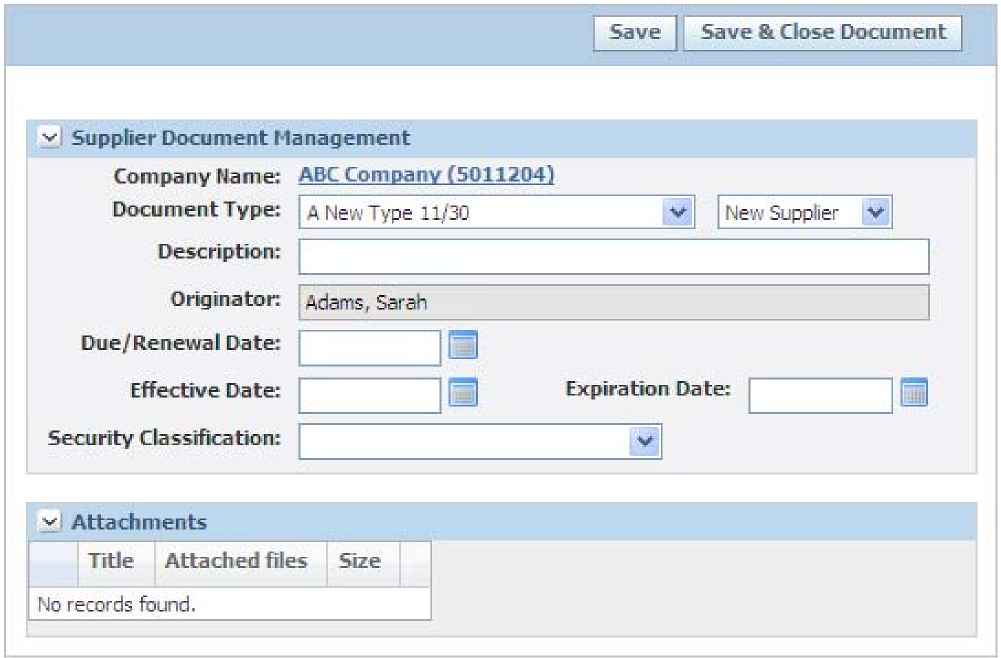
To add a supplier document:

1. Select the company profile, facility profile, or sourcing approval that you want to add the supplier document to.
2. On the Supporting Documents tab, click **Edit** from the action menu. The page refreshes and the fields display in editable mode as Figure 4–5 shows.

*Figure 4–5 Supporting Documents page in edit mode*

3. Click **Add New** under the Supplier Document Management section. The Supplier Document Management page displays, as Figure 4–6 shows.

***Figure 4–6 Supplier Document Management page; Company example***



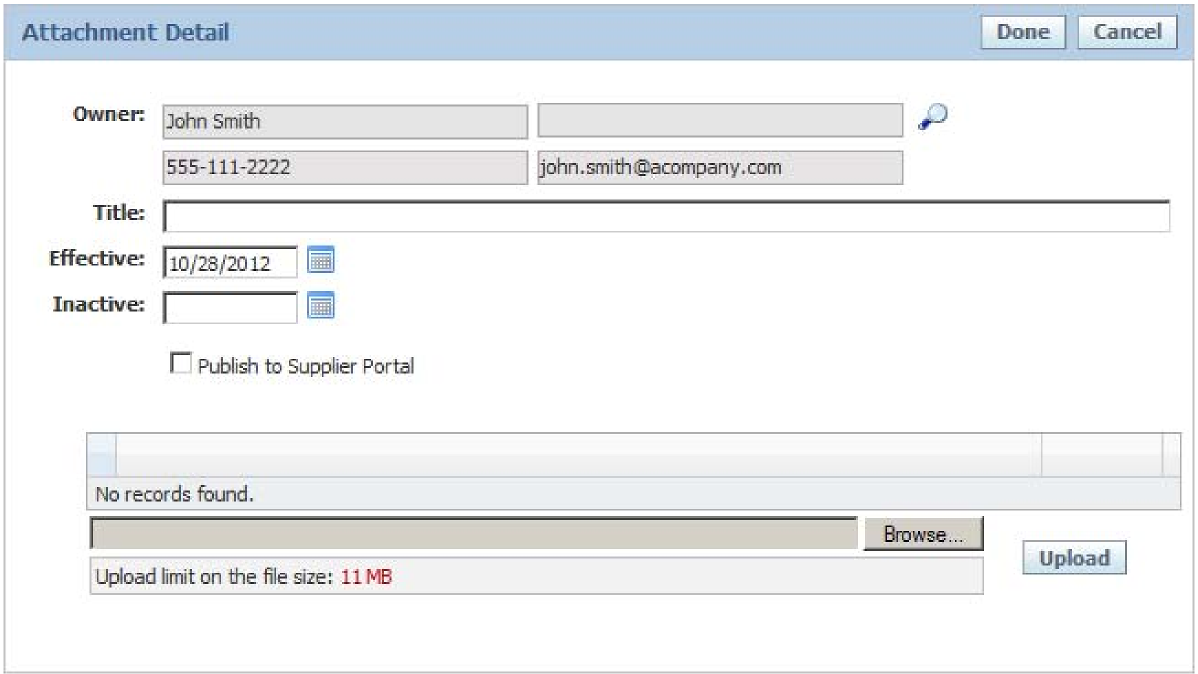

4. Complete the following fields in the Supplier Document Management section:

   - **(Object Name)** — The name of the company, facility, specification-related sourcing approval, or non-specification related sourcing approval. This field is supplied by the system and cannot be changed.
   - **Document Type** — Type of supplier document.
   - **Document Status (unlabeled)** — Status of the document.
   - **Description** — Description of the document.
   - **Originator** — The name of the person who created the document. This field is supplied by the system and cannot be changed.
   - **Due/Renewal Date** — The due date or renewal date.
   - **Effective Date** — The date the supplier document takes effect.
   - **Expiration Date** — The date the supplier document expires.
   - **Security Classification**—The security classification assigned to the document. This field appears when object level security (OLS) is configured on. For more information on OLS, refer to the *Agile Product Lifecycle Management for Process Security Configuration Guide*.

5. Click **Save** at the top right of the page. The Add New button displays at the bottom of the Attachments section.

6. Click **Add New** to add a new attachment to the supplier document. SCRM displays the Attachment Detail dialog box, as shown in Figure 4–7.

*Figure 4–7 Attachment Detail dialog box*




7. Complete the following fields:
   - **Owner** — The owner of the attachment. This field is pre-populated with the name of the user who is logged into the system.
   - **Title** — The title of the attachment.
   - **Effective** — The effective date of the attachment. This field is pre-populated with the current date.
   - **Publish to Supplier Portal** — Check this box if you want to publish the attachment on Supplier Portal.
8. Attach the file by clicking **Browse** to search for the file, and then click Upload.
9. Click **Done** at the top right of the page. The Supplier Document Management page refreshes and the fields you changed display in edit mode.
10. Click **Save & Close Document** at the top right of the page.

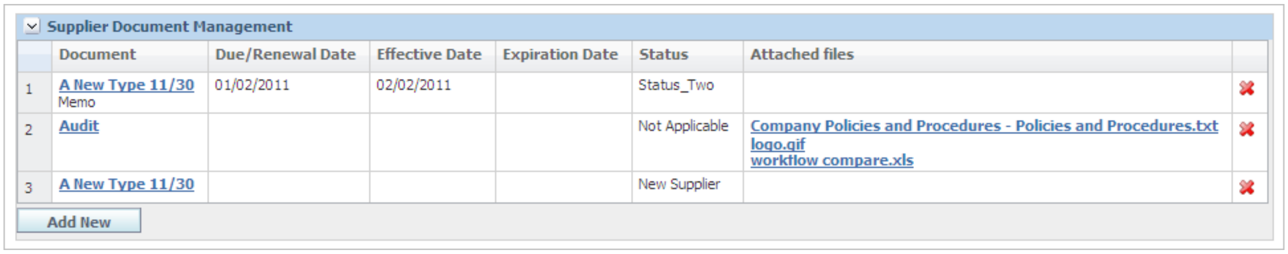
## Editing Supplier Documents

To edit a supplier document, use the Supplier Document Management search feature or go to the business object to locate the document. Click **Edit Document**. The Supplier Document Management page displays in edit mode. Make changes to the fields as described on page 4-8. Click **Save** at the top right of the page.

## Deleting Supplier Documents

To delete a supplier document, use the Supplier Document Management search feature or go directly to the business object to locate the document. With the page in edit mode, click the delete icon () on the row of the document that you want to delete, as Figure 4–8 shows.

***Figure 4–8 Business object document row in edit mode***




Click **OK** in the confirm deletion dialog box. Click **Save**.

# 5

# Creating and Managing Templates

This chapter presents guidance on creating and managing templates in SCRM. Topics in this chapter include:

- Overview
- Creating Templates
- Consuming Templates

## Overview

SCRM templates provide the ability to create objects containing attributes which will be copied when creating companies, facilities, and sourcing approvals. Templates can be created for the following objects:

- Companies
- Facilities
- Specification related sourcing approvals
- Non-specification related sourcing approvals.

Once a company or facility template is created, it can be used to create objects. A specification related and non-specification related sourcing approval template must be published before it can be used to create objects.

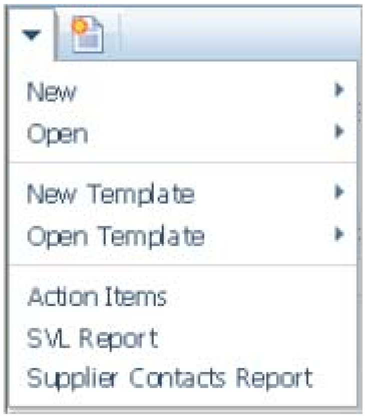
## Creating Templates

### Roles for Template Creation

A user will need the UGM role of TEMPLATE_CREATOR plus the base object creator role to create templates. For example, a user assigned the SAC_CREATOR role can create "blank" specification related sourcing approvals. With the SAC_CREATOR and TEMPLATE_CREATOR roles, the user can create specification related sourcing approval templates. For a list of spec_creator roles, please refer to the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Users with the appropriate roles see the following options in the navigation menu.

*Figure 5–1 Template creation options*




**New Template**—Allows users to select the object type they would like to create and create a new template.

**Open Template**—Allows users to see templates that have already been created.

## Template Attributes

Templates generally have the same attributes available for edit as their corresponding object. Many values added to these attributes will be copied to the object when a user creates an object from a template.

---

**Note:** Facility templates can not be assigned a parent company, and sourcing approval templates can not be assigned a company, facility, or specification.

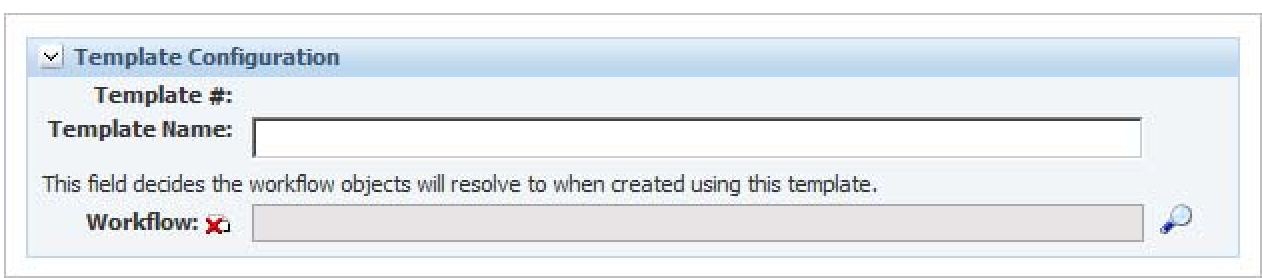
---

Templates also have some additional fields which can be found in the "Template Configuration" section.

## Template Configuration

All templates have a Template Configuration section. For sourcing approval templates, this section contains the Workflow field, as shown in Figure 5–2.

*Figure 5–2 Template Configuration section, specification-related sourcing approval*




**Workflow**—The template creator uses the Workflow field to specify a sourcing approval workflow template. When a sourcing approval is created from a template, it will automatically resolve to this workflow. If this field is left blank, the sourcing approval created will use standard SCRM workflow resolution.

## Template Access

Sourcing approval templates resolve to WFA workflows. Along with the specific user roles discussed above, workflow controls read and write access to sourcing approval templates. WFA has a resolution criteria of "is Template", allowing templates to resolve to separate workflow templates. See the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information.

Company and facility templates do not resolve to WFA workflows but they do respect SCRM Business Unit security. Template creators that do not have access to the business unit assigned to a template cannot read the template. If the Business Unit field is left blank on the template, then all users will have access to it. See the *Agile Product Lifecycle Management for Process Security Configuration Guide* for more information.

### Template Availability

Company and facility templates are instantly accessible to end users, however sourcing approval templates are not. Sourcing approval templates must be in a "published" state before general users can start creating sourcing approvals using them. This setup allows a template to go through its own workflow and approval process before objects are created based on them. A template is considered published when template is in a status that contains the "Publish Template" workflow tag. See the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information.

# Consuming Templates

A user must have the appropriate role to create an object from a template. For example, users assigned the CREATE_FROM_TEMPLATE_5001 role can create companies from templates. See the roles appendix in the *Agile Product Lifecycle Management for Process Administrator User Guide* for a full list of roles.

Users with this role see the **New > OBJECT TYPE > From Template** option in the navigation menu.

The third panel displays the most recently used templates under the "From Template" header. Click on any of the most recently used templates to instantly create an object using that template. You can also click the **More** link or the **From Template** header to open a template search screen.

Use this page to search for the template you would like to use. The template you select automatically creates the new object based on that template and puts it in edit mode.

For more information on creating objects, see the following topics:

- "Creating a Company Profile" on page 2-2
- "Creating a Facility Profile" on page 2-12
- "Creating a Specification-Related Sourcing Approval" on page 3-5
- "Creating a Non-Specification Related Sourcing Approval" on page 3-14