

How to create Qualifications:

Step 1: Create Initiatives

The screenshot shows the Oracle SCM UI interface. In the center, a modal dialog box titled "Create Initiative" is open. Inside the dialog, there are fields for "Type" (set to "Qualification"), "Procurement BU" (set to "US1 Business Unit"), "Title" (set to "Data modernization"), and "Owner" (set to "student_scm10"). At the bottom of the dialog are two buttons: "Create" and "Cancel". The background of the main screen shows various initiative status counts (Initiatives: 4, Pending Acceptance: 0, Pending Evaluation: 0) and a section for "Last Launched Initiative" which says "No data available". On the right side, there's a sidebar with sections for "Supplier Qualification" (with a link to "Create Initiative") and "Setup" (with links to Manage Questions, Manage Qualification Areas, etc.). A bar chart is also visible in the background.

Click on Create

The screenshot shows the Oracle SCM UI interface with the "Qualifications" tab selected. The main area displays a table for "Qualification Areas". The first row in the table is highlighted with yellow and contains the text "Financial Viability". To the right of the table, there is a "Qualification" section with fields for "Questions", "Owner" (set to "Roth, Calvin"), and "Evaluation Due Date" (set to "mid/yy"). Below this, another table titled "Suppliers" is shown, listing "Staples" as a supplier with details like Supplier Number (1260), Supplier Site (Staples US1), and Supplier Contact (Jesse, Abor).

Add the qualification area and Supplier details.

Edit Initiative 10233: Overview

Overview Edit Initiative: 10233

1 Overview 2 Configuration 3 Questionnaires 4 Review

Status: Draft

* Title: Data modernization

Description: Testing

Procurement BU: US1 Business Unit

Type: Qualification
... Internal survey

Initiative Owner: student, scm10

Internal Note:

Attachments: None

Additional Information

Qualifications Evaluation Team

Qualification Areas

* Qualification Area	Revision	Description	Questions	Owner	Qualification	Evaluation Due Date
Financial Viability	1	Financial stability information including size and credit ratings.		Roth, Calvin	in/day	

Click on next,

Edit Initiative 10233: Configuration

Overview Configuration Questionnaires Review

Suppliers

Supplier	Supplier Site	Send Questionnaire	Supplier Contact	Internal Responder	Preview Responses
Staples	Staples US1	✓	✓	✓	

Staples: Qualifications

Name	Area Revision	Qualification Outcome	Active Qualification	Area Revision	Start Date	End Date	Qualifications In Progress	Preview Responses
Financial Viability	1							60

Columns Hidden: 3

Here we have to check the internal responder everything added or not.

Here we have 3 sections, Overview, Qualifications and Questionaries.

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The screenshot shows the Oracle Fusion Initiative Questionnaire editor. At the top, there are tabs: Overview, Edit Initiative: 10233, Configuration, Questionnaires (which is selected), and Review. Below the tabs, a progress bar shows steps 1 through 4. The main area is titled "Edit Initiative 10233: Questionnaires". It includes sections for "Supplier Questionnaire" (Title: Data modernization, Due Date: mdyy, First Reminder: Days prior to due date, Second Reminder: Days prior to due date, Past Due Reminder: Days after due date) and "Introduction" (Please answer the following questions. Thanks you.). There are also sections for "Attachments" (None) and "Questions". A question titled "How many people are employed by your company?" has two options: "Up to 100" and "101 - 500".

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The screenshot shows the Oracle Fusion Initiative Overview editor. At the top, there are tabs: Overview, Edit Initiative: 10233, Configuration, Questionnaires, and Review. Below the tabs, a progress bar shows steps 1 through 4. The main area is titled "Edit Initiative 10233: Overview". It includes sections for "Procurement BU" (US1 Business Unit), "Type" (Qualification, Internal survey), "Internal Note" (empty), and "Attachments" (None). There is also a section for "Additional Information" under "Qualifications" (Evaluation Team).

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The screenshot shows the Oracle Fusion Initiative Suppliers editor. At the top, there are tabs: Suppliers, Edit Initiative: 10233, Configuration, Questionnaires, and Review. Below the tabs, a progress bar shows steps 1 through 4. The main area is titled "Edit Initiative 10233: Suppliers". It includes sections for "Supplier" (Supplier Number: 1260, Supplier Site: Staples US1, Supplier Contact: Jhee. Abe, Internal Responder: student.som10, Existing Qualifications: None, Qualifications in Progress: None).

2. Estimate your expected revenue for your current fiscal year.

Response Attachments: None

3. What is the final month of your company's fiscal year?

4. Is your business a public company?

- a. Yes
Response Attachments: None
- b. No
Response Attachments: None

Comments

4.b.1. Are you willing to provide a copy of an audited financial statement under NDA? (If NDA is in already in place, please attach your financial statements. If an NDA is not in place, answer Yes, but do not attach any non-public information.)
If an NDA is required, we will contact you.

- a. Yes
Response Attachments: None
- b. No
Response Attachments: None

Comments

Section: 1. Financial Viability

Click on Save and Launch

Review Initiative: 10233

Overview Configuration Questionnaires Review

Validate Back Next Save Launch Cancel

Last Saved: 3/11/29 12:20 PM

Description: Testing
Initiative Owner: scm10 student

Warning: You're about to launch this initiative. Do you want to continue?

Yes No

Internal Note: None
Attachments: None

Initiatives: 4

Pending Acceptance: 0

Overdue: 0

Rejected: 0

Questionnaires: 0

Confirmation: Initiative 10233 was launched. Questionnaires were sent to the following number of suppliers: 1, and internal responders: 1.

OK

Launched Initiative

No data available

Assessments: 0

Automation Results Last 30 Days: 0 Qualifications, 0 Assessments, 0 Initiatives

Automation Errors Last 30 Days: 0

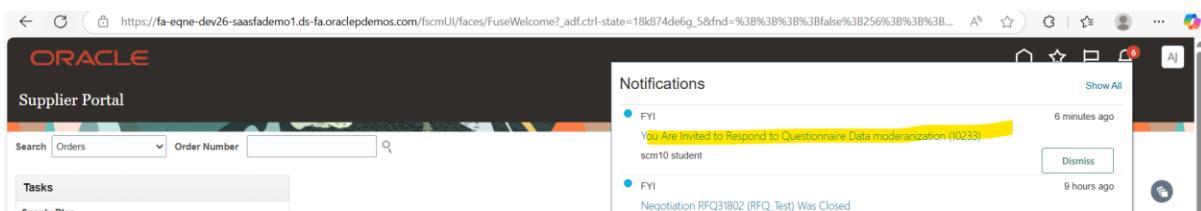
Expired Qualifications: No data to display

Qualified Suppliers: Compliance: 0.62%, Hub Zone: 0.62%, New Compliance: 0.62%, New Environment: 0.62%, New Financial Viability: 0.62%

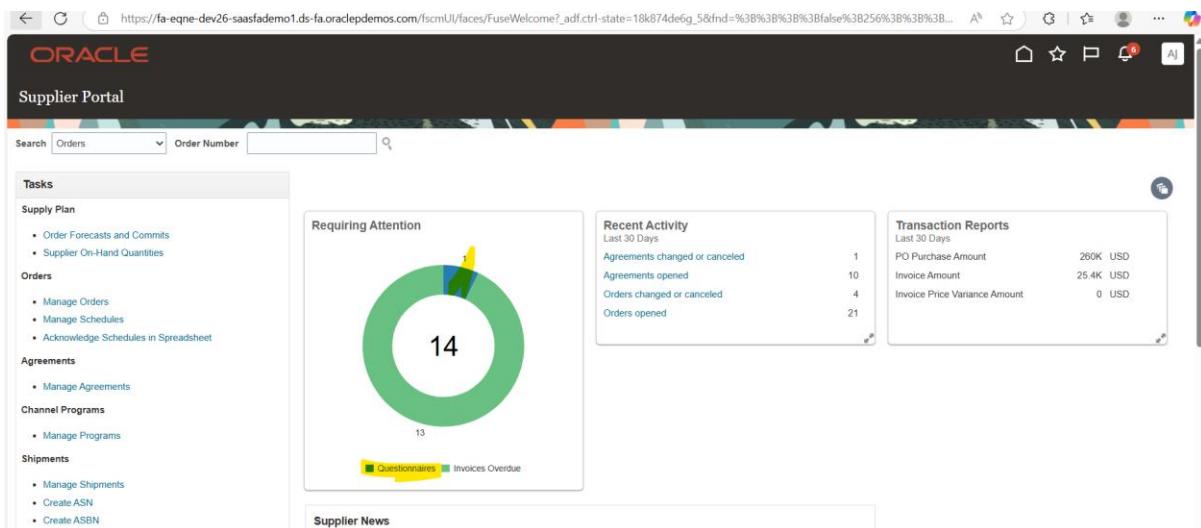
Step 2: go to the supplier portal provide the responses.

Staples supplier → contact: user name: ABE.JHEE password: welcome123

Login with supplier contact



We will get the notification about the questionaries.



We need to respond to the questionaries.

Click on Mange questionaries

The screenshot shows the Oracle SCM UI homepage. On the left, there's a sidebar with several categories and their sub-links:

- Upload ASN or ASN**
- View Receipts**
- View Returns**
- Contracts and Deliverables**
 - Manage Contracts**
 - Manage Deliverables**
- Work Confirmations**
 - Manage Work Confirmations**
- Consigned Inventory**
 - Review Consumption Advices**
- Invoices and Payments**
 - Create Invoice**
 - Create Invoice Without PO**
 - View Invoices**
 - View Payments**
- Negotiations**
 - View Active Negotiations**
 - Manage Responses**
- Auctions from Seller**
 - View Active Seller Auctions**
 - Manage Seller Auction Bids**
- Qualifications**
 - Manage Questionnaires**
 - View Qualifications**
- Company Profile**

The main content area has a message to suppliers:

Hi All Suppliers,
Please be sure your supplier profile is up to date. Especially your Business Classification certificates. Direct all issues to your procurement agent manager.
Also please participate in all bidding activities and also please create supplier invoices on time.
Please ship the goods on time.

Thanks
Procurement Team

Click on manage questionaries

The screenshot shows the "Manage Questionnaires" page. At the top, there are search filters:

- Search**: Includes fields for **Questionnaire Title**, **Questionnaire**, and **Supplier Site**.
- Advanced**, **Manage Watchlist**, **Saved Search**, **Requiring Attention**
- At least one is required**
- Status**: Not started, Draft, Resubmis
- Response Due Date**: m/d/y
- Supplier Contact**

Below the filters is a **Search Results** table:

Questionnaire	Questionnaire Title	Supplier Site	Status	Response Due Date	View PDF
10233	Data modernization	Staples US1	Not started		

Actions: **Actions**, **View**, **Format**, **Freeze**, **Detach**, **Wrap**, **Respond**

Columns Hidden: 6

Select the line and click on respond

Please answer the following questions, Thanks you

Questions
Financial Viability

1. How many people are employed by your company?
 - a. Up to 100
 - b. 101 - 500
 - c. 501 - 1000
 - d. 1001 - 5000
 - e. 5001 - 20000
 - f. 20001+
2. Estimate your expected revenue for your current fiscal year:
17,906,000.00
3. What is the final month of your company's fiscal year?
1. December
4. Is your business a public company?
 - a. Yes
 - b. No

Comments
I am ready to provide services to your organization

Answer the questions and submit it

The screenshot shows the Oracle Questionnaire Response page. At the top, it displays the title 'Data modernization', Procurement BU 'US1 Business Unit', and Requested By 'scm10 student'. Below this, the Supplier is listed as 'Staples' with Site 'Staples US1' and Responder 'Abe Jhee'. The Status is 'Draft' with no Due Date or attachments. The main content area shows an introduction asking to answer the following questions. A section titled 'Financial Viability' contains a question: 'How many people are employed by your company?' with options a-f. Option f ('20001+') is selected. A progress bar indicates completion of section 1.

Submit it

The screenshot shows the Oracle Manage Questionnaires page. A confirmation dialog box is open, stating 'The response to the Data modernization questionnaire was submitted.' The search interface includes fields for 'Questionnaire Title', 'Questionnaire', 'Supplier Site', 'Status', 'Due Date', and 'Supplier Contact'. The search results table shows one record: Questionnaire ID 10233 with Title 'Data modernization', Supplier Site 'Staples US1', Status 'Not started', and Response Due Date 'mid/yy'.

The response was submitted

Go back to our homepage , notifications(bell icon)check whether the responses are received by the owner(roth , Calvin) or not

Login with roth, calvin

CALVIN.ROTH , Welcome123

The screenshot shows the Oracle homepage with various dashboards. On the right side, a 'Notifications' sidebar is open, listing several messages from 'FYI' accounts. One message is highlighted in yellow: 'Staples (Staples US1) Responded to Questionnaire 10233 (Data modernization)' by 'Abe Jhee' 2 minutes ago. Other notifications include messages from 'You Are Invited to Respond to Questionnaire Data modernization (10233)' and supplier profile change requests for 'Supplier Staples (Staples US1)', 'scm10 student', 'kumar_supplier', 'anandsupplier', and 'Testnew_supplier'.

Staples (Staples US1) Responded to Questionnaire 10233 (Data moderation)

Initiatives

- Draft: 4
- Pending Responses: 0
- Pending Acceptance: 0

Recommended Actions

- Review Response

Supplier: Staples
Supplier Site: Staples US1
Responder: Abe Jhee

Click on Review Responses

(or) alternative

Initiatives: 4

Questionnaire Responses: 1

- Pending Acceptance: 0
- Overdue: 0
- Rejected: 0

Ready for Evaluation: 0 Qualifications, 0 Assessments

Expiring: 0 Qualifications, 0 Assessments

Last Launched Initiative: Data moderation

- Received Responses: 50%
- Accepted Responses: 0%
- Completed Qualifications: 0%
- Completed Suppliers: 0%

Expired Qualifications: No data to display

Qualified Suppliers

Compliance	Percentage
Hub Zone	0.62%
New Compliance	0.62%
New Environment	0.62%
New Financial Viability	0.62%

Automation Results: Last 30 Days

- Qualifications: 0
- Assessments: 0
- Initiatives: 0

Automation Errors: Last 30 Days

- 0

Monitor Initiative: 10233

Title: Data moderation
Status: In progress
Procurement BU: US1 Business Unit

Supplier Response Due Date: None

Internal Response Due Date: None

Received Responses: 50%
Accepted Responses: 0%
Completed Qualifications: 0%
Completed Suppliers: 0%

Suppliers

Supplier	Supplier Site	Supplier	Questionnaire Response Status	Incomplete Qualifications
Staples	Staples US1	Submitted	Not started	1

Staples: Qualifications

Qualification Name	Status	Qualification Outcome
21069 Financial Viability	Draft	

Select the suppliers and Click on Review and Accept

The screenshot shows the Oracle Fusion Cloud Service interface. At the top, it says "Monitor Initiative: 10233". The main area displays the following details:

- Title: Data modernization
- Status: In progress
- Procurement BU: US1 Business Unit
- Supplier Response Due Date: None
- Supplier Last Reminder: None
- Internal Response Due Date: None
- Internal Last Reminder: None

A chart on the right shows "Received Responses" at 50%.

Below this is a table titled "Suppliers" with one row for "Staples".

A modal window titled "Review and Accept" is open, showing "Supplier Response: Internal Response".

The "Review Response" screen for Staples (Data modernization) is also shown, with a modal menu open containing "Return to Responder" and "View Questionnaire".

The "Responses" section shows the following table:

Question	Response	Responder Comments	Acceptance Note	Response History
Financial Viability				
P1. Employee Count	f. 20001+			
P2. CFY Revenue	17,906,000.00			
P3. Last Month of FY	I. December			
P4. Public Company?	a. Yes	I am ready to provide services to your organization		

If you want more details from the supplier you can return to responder. Click on the button.

Otherwise accept it.

The screenshot shows the "Review Response" screen for Staples (Data modernization). The modal menu now contains "Accept" and "Cancel".

The "Responses" table is identical to the previous screenshot:

Question	Response	Responder Comments	Acceptance Note	Response History
Financial Viability				
P1. Employee Count	f. 20001+			
P2. CFY Revenue	17,906,000.00			
P3. Last Month of FY	I. December			
P4. Public Company?	a. Yes	I am ready to provide services to your organization		

Click on accept.

The screenshot shows the Oracle SCM UI interface. At the top, there's a navigation bar with links like Overview, Monitor Initiative: 10233, Refresh, Actions, and Done. Below the navigation is a confirmation dialog box titled "Confirmation" with the message: "The supplier profile change request for supplier Staples (Staples US1) has been submitted." The background shows a table for "Suppliers" with one row for "Staples". Another section below is titled "Staples: Qualifications" with a table showing one qualification entry for "Financial Viability".

Step 4:

This screenshot shows the Oracle SCM UI interface under the "Setup: Procurement" section. On the left, there's a sidebar with "Functional Areas" listed: Initial Users, Enterprise Profile, Legal Structures, Financial Reporting Structures, Organization Structures, Workforce Structures, Users and Security, Purchasing Categories, Suppliers, Approval Management (which is highlighted), Procurement Foundation, Items, Purchasing Foundation, Procurement Transaction Account Rules, and Transaction Tax. The main area is titled "Approval Management" and displays a table of tasks. One task, "Manage Supplier Profile Change Approvals", is highlighted with a yellow box.

We have to check the approvals, it is already enabled as auto approve.

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Approval Task Supplier Profile Change Approvals
Version 11.13.24.10.0
Stage Change Request First Stage Approvals
Participant Serial Approval

Rules

Rule	Priority	Conditions	Enabled
Empty Rule	Medium	Rule always applies	<input checked="" type="checkbox"/>

Columns Hidden 1

Empty Rule: Details

Conditions
Rule always applies

Actions

Action 1

Action Type Automatic
Set Outcome To Approved

Add Action

Goto Manage Initiatives

fa-eqne-dev26-saasfademo1.ds-fa.oraclepdemos.com/fscmUI/faces/FuseWelcome?_afrLoop=27516487542195703&_adf.ctrl-state=5s2s5nth9&_afrWindowId=5s2s5nth9&_afrWindowMode=0&_afrWindowId=5s2s5nth9&_afrWindowMode=0

Supplier Qualification

- Create Initiative
- Manage Initiatives**
- Manage Qualifications
- Manage Assessments
- Manage Questionnaires
- Research Suppliers

Setup

- Manage Questions
- Manage Qualification Areas
- Manage Qualification Models
- Manage Rule Sets
- Manage Automation Errors

fa-eqne-dev26-saasfademo1.ds-fa.oraclepdemos.com/fscmUI/faces/FuseWelcome?_afrLoop=27516487542195703&_adf.ctrl-state=5s2s5nth9&_afrWindowId=5s2s5nth9&_afrWindowMode=0&_afrWindowId=5s2s5nth9&_afrWindowMode=0

Search

Advanced Manage Watchlist Saved Search Draft and In-Progress Initiatives

My Role All

** Status Draft/In progress

Supplier

Internal Survey

Search Reset Save...

Search Results

Initiative	Title	Status	Internal Survey	Monitor	Launch Date	Response Due Date	Received Responses	Accepted Responses	Completed Suppliers
10233	Data modernization	In progress	No		3/11/25		50%	50%	0%
10232	Test	Draft	No				0%	0%	0%
10231	Test	Draft	No				0%	0%	0%
10230	supplier performance	Draft	Yes				0%	0%	0%
10229	SAI TESTING PURPOSE	Draft	Yes				0%	0%	0%

Click on monitor symbol

Monitor Initiative: 10233

Title: Data modernization
Status: In progress
Procurement BU: US1 Business Unit

Supplier Response Due Date
Supplier Last Reminder: None
Internal Response Due Date
Internal Last Reminder: None

Received Responses: 50%
Accepted Responses: 50%
Completed Qualifications
Completed Suppliers: Percentage

Suppliers

Supplier	Supplier Site	Supplier	Questionnaire Response Status	Incomplete Qualifications
Staples	Staples US1	Accepted	Not started	1

Staples: Qualifications

Qualification Name	Status	Qualification Outcome
21069 Financial Viability	Draft	

And also accepted with both supplier and internal evaluator

Login with calvin.roth

Monitor Initiative: 10234

Title: Test1
Status: In progress
Procurement BU: US1 Business Unit

Supplier Response Due Date
Supplier Last Reminder: None
Internal Response Due Date
Internal Last Reminder: None

Received Responses: 100%
Accepted Responses: 100%
Completed Qualifications
Completed Suppliers: Percentage

Suppliers

Supplier	Supplier Site	Supplier	Questionnaire Response Status	Incomplete Qualifications
Staples	Staples US1	Accepted	Accepted	1

Staples: Qualifications

Qualification Name	Status	Qualification Outcome
21070 Financial Viability	Ready for eval.	

We can able to see, it is ready to evaluate, select the line and click on Evaluate Qualifications.

Click on details

Evaluate Qualification: 21070 (Financial Viability): Overview

Supplier: Staples
Supplier Site: Staples US1
Supplier Contact: Jnee, Abe
Procurement BU: US1 Business Unit
*** Qualification Owner:** Roth, Calvin

Qualification Name: Financial Viability
Qualification Area Revision: 1
Status: Ready for evaluation
Evaluation Due Date: 3/12/25
Previous Qualification Outcome:

Qualification Result:
Qualification Outcome: Excellent
Comments: He is excellent

Qualification Start Date: 3/11/25 5:01 PM
Qualification End Date: 3/11/26 5:02 PM
Expiration Period: 0 Days
Evaluation Date: mdyy
Attachments: None

Controls:
 Share with Supplier Summary
 Supplier response
 Internal response
Note to Supplier:

Automatic Requalification:
 On expiration
 On new response

Additional Information:

Enter the qualification start date, end date, qualification outcome, comments and Share with Supplier.

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Monitor Initiative: 10234

Title: Test1
Status: Completed
Procurement BU: US1 Business Unit

Supplier Response Status:

Internal Response Status:

Internal Last Reminder: None

Suppliers:

Supplier	Supplier Site	Questionnaire Response Status	Incomplete Qualifications
Staples	Staples US1	Accepted	0

Confirmation: Qualification 21070 has been finalized.

Qualifications has been finalized

Now Goto Manage Suppliers> search with the Suppliers> Goto Qualification tab, now you can able to see the All the qualifications to the suppliers.

fa-eqne-dev26-saasfademo1.ds-fa.oraclepdemos.com/fscmUI/faces/FuseWelcome?_adf.ctrl-state=yi0hexvqq_5

Supplier: Staples

Assessments:

Qualifications:

Procurement BU	Assessment Name	Supplier Site	Status	Assessment Outcome	Start Date	End Date
US1 Business Unit	Financial Viability	Staples US1	Active	No	3/11/25	3/11/26

Goto the Supplier portal for the supplier

Click on view qualifications

The screenshot shows a left sidebar with various navigation links under categories like Contracts and Deliverables, Work Confirmations, Consigned Inventory, Invoices and Payments, Negotiations, Auctions from Seller, Qualifications, and Company Profile. The main content area displays a message to 'All Suppliers' asking them to update their supplier profile and participate in bidding activities. It also thanks the Procurement Team.

We can able to see all the qualifications.

The screenshot shows the 'Qualifications' page. It has two main sections: 'Assessments' and 'Qualifications'. The 'Assessments' section shows a table with one row, indicating 'No data to display'. The 'Qualifications' section shows a table with one row, listing 'Financial Viability' with an outcome of 'Excellent' for 'Staples US1'.

Assessment Name	Assessment Outcome	Supplier Site	Status	Start Date	End Date	Note to Supplier
No data to display.						

Qualification Name	Qualification Outcome	Supplier Site	Status	Start Date	End Date	Note to Supplier
Financial Viability	Excellent	Staples US1	Active	3/11/25	3/11/26	