Informatica® MDM - Supplier 360
10.3 HotFix 1

User Guide

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Preface

This guide is intended for business managers responsible for supplier onboarding, supplier qualification, and ongoing supplier relationship management.

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To find online support resources on the Informatica Network, visit https://network.informatica.com and select the eSupport option.

Introduction to Informatica MDM - Supplier 360

This chapter includes the following topics:

Informatica MDM - Supplier 360 Application Overview

Informatica MDM - Supplier 360 provides clean, consistent, and connected information about suppliers. Business managers use this master supplier data to make better business decisions about suppliers and to implement processes that can save the organization money.

With Supplier 360, business users can achieve the following goals:

- Automate supplier applications and profile maintenance with the Supplier Portal.
- Streamline the supplier onboarding and approval processes.
- Centralize data about suppliers in a master database.
- Enrich supplier data with related information, such as compliance documents, for a true 360 degree view of a supplier.
- Reflect relationships among suppliers, parent companies, subsidiaries, and subsuppliers.
- Alert business managers to existing and upcoming compliance issues.
- Analyze suppliers based on attributes, such as performance, location, products, services, and invoices.
- Connect supplier data with the supplier product catalogs.
- Distribute trustworthy supplier data to business applications and analytical applications across the organization.

Supplier 360 is an application designed for Informatica Multidomain MDM. Business users connect to master supplier data through a business-friendly user interface, which displays an enterprise-level dashboard as well as 360 degree supplier views that are customized for different business users.

You can add optional products to your Supplier 360 environment. When the environment includes a product information management system, such as Informatica Product 360, suppliers can remotely upload product catalogs to the Product Information Management (PIM) system. When the environment includes Data-as-a-Service, all supplier contact information goes through a validation process.

Supplier 360 contains the following components:

- Supplier Relationship Management
- Supplier Portal
- Product Information Management Integration

Example

A global automobile manufacturer experiences multiple issues with its supply chain. The management team has poor insight into everything from the total spend with a supplier to supplier performance.

Total spend is virtually impossible to assess. The manufacturer has hundreds of suppliers, and the supplier information is dispersed across multiple systems in different geographic areas. The same supplier can be in the systems under slightly different supplier names. The manufacturer holds multiple locally negotiated contracts with a supplier. Without a complete picture, the contract terms do not reflect the total spend with a supplier.

The management team does not have insight into supplier overall performance, such as the percentage of orders delivered on time over the last year. Therefore, managers do not take action to resolve performance issues. Late or incomplete shipments of parts continuously affect the supply chain. In some cases, managers have not lined up alternative suppliers for parts, so when parts are unavailable from one supplier, the manufacturing line falters.

Finally, the organization is acquiring another company later in the year. The management team wants a solution in place before that acquisition completes.

Informatica Solution

The IT department implements Supplier 360. An administrator loads data from source systems into Supplier 360, which includes a centralized database for master supplier profiles. Within the centralized database, the application identifies potential duplicate suppliers.

Data stewards review potential duplicate suppliers and merge the supplier profiles as appropriate. Data stewards edit supplier profiles and set up supplier relationships by identifying parent companies and their subsidiaries. Whenever a data steward modifies a record that is part of a supplier profile, the data steward sends the record for review through an online business process.

With the reviewed and approved master data in place, data stewards send invitations to all qualified suppliers to register on the Supplier Portal. Registered qualified suppliers can update their information, add product catalogs, and monitor their performance. Other suppliers use the Supplier Portal to apply to become a supplier to the organization. Online application forms go through an online onboarding and qualification process.

Managers participate in reviews of supplier applications and monitor supplier performance and compliance. When business managers identify compliance and performance issues, they create alerts to notify suppliers of the issues. Managers edit supplier profiles and initiate a change-approval review from the Data workspace. Managers identify alternative suppliers for all key parts and invite the suppliers to complete an online application through the Supplier Portal.

Within the first year, the organization realized savings in the following areas:

- Saved on purchase prices by negotiating with suppliers to provide single favorable contracts for all locales, including volume discounts and early payment discounts
- Reduced costly delays in the supply chain by using alternative suppliers for parts and by monitoring and correcting supplier performance
- Reduced administrative costs by implementing a self-service approach for new suppliers to apply online and for existing suppliers to maintain their supplier data online
- Reduced administrative costs by using an automated business process for the qualification workflow
- Reduced the costs of integrating supplier data after the acquisition by adding the acquired systems as source systems to the MDM Hub

Supplier Management

Supplier 360 adds features to the Informatica MDM environment, such as a database schema for supplier data, business processes for supplier management, and an interface that business users use to access supplier data.

Supplier relationship management includes approval of a supplier, supplier profile management, and assessment of the supplier performance.

Supplier Portal

The Supplier Portal (Portal) is a web application. Supplier representatives use the Supplier Portal to initiate a relationship with your organization and to fill out an online application form. After business users in your organization approve a supplier, the supplier representatives use the Supplier Portal to upload documents, update information, and monitor performance. They might also be able to upload product catalogs into a PIM system.

For more information about the Supplier Portal, see .

Key Concept

To work effectively in Supplier 360, you need a basic understanding of the Informatica Master Data Management concepts.

Records

When you use Supplier 360, you are working with master records. For example, a supplier record that contains the details about the supplier.

Master Records

A master record contains a root record and multiple child records. In Supplier 360, the structure and display of the master records depends on the structure defined in either business entities or subject areas.

Parent Records

The parent record or root record contains the data that identifies the record. For example, a parent record for a supplier contains the full name of the supplier, business name, business type and so on.

Child Records

A child record contains data that is associated with a parent record. For example, a child record for a supplier might contain addresses of the supplier while another child record contact details of the supplier. Child records can have their own child records.

Active Records

Active records contain approved master data.

Pending Records

When you make a change to a record, the change might need to go through a review workflow before it can be approved as master data. While the record is pending approval, the record is called a pending record and you are restricted in the actions that you can perform on a pending record. When the change is approved, the record returns to the active record state.

Business Entities

Business entities are an implementation of master data domains in your application. For example, the supplier master data domain can be implemented in the following types of business entities: Supplier, Contacts, or Accounts.

The business entity data structure maps to the base object tables in the Operational Reference Store database. The base object tables contain all the master records. For example, the parent node of a business entity corresponds to the root base object table. A child node in the business entity corresponds to a child base object table. Business entities can have an unlimited depth, though the views that display the child records might not be able to show all levels in a meaningful way beyond a certain depth.

Product Information Management Integration

Product Information Management (PIM) systems create a single repository for all product data. In Supplier 360, a PIM system is an optional component. When the Application environment includes a PIM system, suppliers can upload their product catalogs from the Supplier Portal.

CHAPTER 2

Getting Started

This chapter includes the following topics:

Getting Started Overview

As a business user, you use Supplier 360 to view and manage supplier profiles. Take a few minutes to familiarize yourself in the user interface and learn how to open supplier profiles.

To get started:

1. Log in to Informatica Data Director and Supplier 360.
2. Understand the user interface.
3. Work with the Task inbox.
4. Open a supplier record.
5. Add, edit, and approve supplier records.

Logging in to Supplier 360

Contact the MDM administrator to request the Supplier 360 host name, port number, and your user credentials.

1. Launch Supplier 360:

   ```
   http://<MDM Server host name>:<MDM Server port number>/mdmapps/
   com.informatica.tools.mdm.web.auth/login
   ```

2. Log in with your user credentials.
3. If prompted to select an application, select **InfaSupplierMaster**.

   Supplier 360 launches and displays the Home page.

Supplier 360 User Interface

The Supplier 360 user interface contains a navigation bar with tabs.

The following image shows the user interface with the **Home** page displayed:
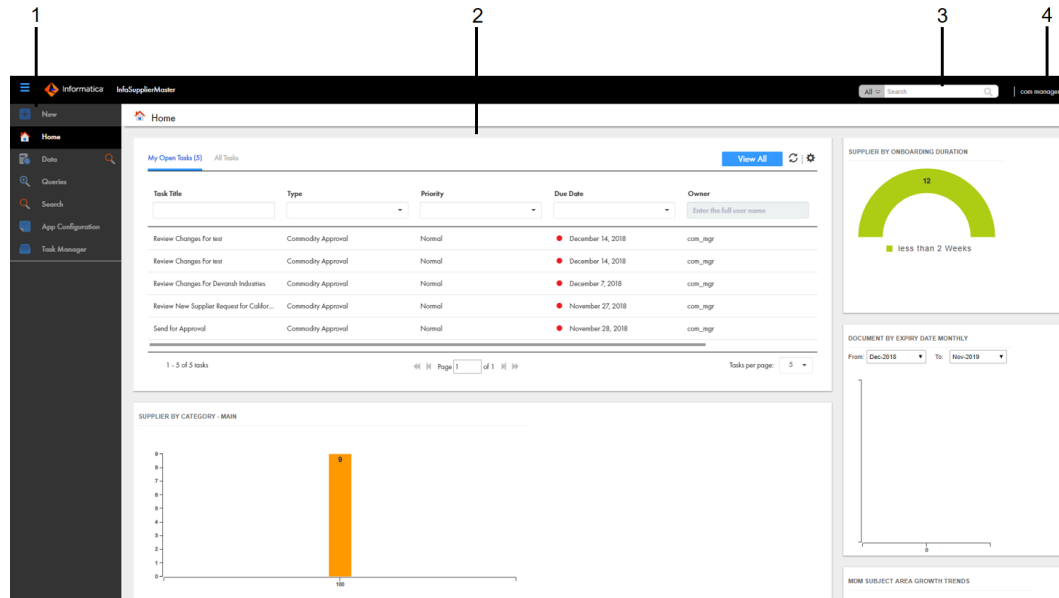
1. Navigation bar
2. Page area
3. Search box
4. User options

The navigation bar contains tabs that link to pages within Supplier 360. A tab contains a page area with one or more panels. In some tabs, you can switch between different views within the page.

Note: Some tabs might not be visible in Supplier 360. For example, if the MDM administrator configures an application with business entities, the MDM administrator might remove the Data tab.

The Supplier 360 user interface contains the following tabs:

New

Use the New tab to create records. The New page lists the type of master data that you can add.

Note: In the New window, if you see both the Business Entity option and Subject Area option, ask the MDM administrator which one to use. The Business Entity option opens an entity tab while the Subject Area option opens the Data tab.

Home

Use the Home page as your dashboard and monitoring page. The page contains the tasks panel, records panel, and a collection of charts. Managers and data stewards can view a list of review tasks in the task inbox. You might see other components related to suppliers. The charts give a visual summary of the suppliers and task details. The MDM administrator configures the Home page.

Task Manager

Managers and data stewards use the Task Manager to review changes to the records. When you click a task in the Home page, the Task Manager opens and displays the record associated with the task.

Data

Use the Data tab to search for and view subject area records from different perspectives.

Note: If the Supplier 360 application uses business entities and the Data tab is hidden, the records open in an entity tab that displays the name of the business entity.

Search

Use the Search page to search supplier records. When you search from the application header, the search results appear in the Search page. You can open a record from the search results.

Queries

Use Queries page to manage queries. You can create a query to find records that you want to view, edit, or delete. You can save a query and reuse the query later.

App Configuration

Use the App Configuration page to configure and change the Supplier 360 properties, such as connection properties, security properties, and workflow adapter-related properties.

Home Page

The Home page is your dashboard and monitoring page that displays a list of tasks and a collection of charts and graphs.

The Home page contains the following components:

Task Inbox

Before a supplier record is added, the record goes through a review process that involves reviewing tasks. By default, the task inbox displays the tasks based on the first quick filter. For example, if the first quick filter is My Open Tasks, the task inbox lists all your open tasks. The other tabs in task inbox includes My Closed Task, All Tasks, All Unclaimed Tasks, All Claimed Tasks, All Closed Tasks.

The following table describes the elements in the task inbox:

Inbox Element	Description
Filters	Filters the tasks based on the filter criteria. You can use the following types of filters alone or in combination: - Quick filters. Filters the tasks based on the predefined filter that you select. - Column filters. Filters the tasks based on the task properties that are visible in the list.
View All	Displays the details of all the listed tasks in the Task Manager.
Refresh icon	Updates the contents of the task inbox.
Table Settings icon	Opens a dialog box where you can configure the columns for each quick filter listed in the task inbox.
Task Title	A link that displays a short description of the review task. To review the record and take action on the task, click the task title. The task opens in the Task Manager and displays the associated record in the review panel. If your role permits it, you can edit the record from this view before taking action on the task.
ID	Instance ID of the review process that generated the task.
Type	Name of a people activity within the process.

Inbox Element	Description
Priority	Priority of the task. The task priority can be Low, Normal, or High. When generating tasks, the review process assigns the same priority to all tasks of the same type.
Due Date	Date the task is due. The review process calculates a default due date based on the task creation date plus a predefined time period. The due date of each task is prefixed with one of the following colored dots: - Green. Indicates that the task is not overdue. - Red. Indicates that the task is overdue. - Amber. Indicates that the task will be overdue in the next 24 hours.
Status	Status of the task can be Open or Closed. When the task status is Open, you can view the record associated with the task.
Owner	Name of the signed-in user.
Creator	Name of the user who created the task.
Creation Date	Date on which the user created the task.

Charts and Graphs

Displays a visual representation of the suppliers and related information.

Charts and Graphs

Charts and graphs on the Home page contain enterprise-level information about all approved suppliers. You can view a visual representation of the suppliers and related information. Use the charts to monitor overall product coverage, performance, and compliance.

Your administrator can add or remove charts from the Home page. All managers share the same Home page, so you might want to coordinate with other managers before requesting changes.

The following table lists the charts that you can see in the Home page of Supplier 360:

Chart	Description
Supplier by Category Main	Displays the number of suppliers that offer similar products or services based on categories. To see the breakdown of a category, double-click the category.
Supplier by Region Metrics	Displays a color-coded map that reflects the number of suppliers by region. You can filter this data by all suppliers and by portal users.
Source System Metrics	Displays the percentage of supplier data that comes from each source system; for example, ERP. If the supplier registers from the supplier portal or if the supplier data is added in Supplier 360, then the source system is SYS0.
Supplier by Onboarding Duration	Displays how long it took to qualify suppliers.
MDM Subject Area Growth Trends	Displays the number of suppliers added in each year.

Chart	Description
Document by Expiry Date Monthly	Displays the number of suppliers with expiring certificates or insurance for the selected range.
Tasks in Total	Displays the total number of tasks and breaks down the tasks by priority.

To see more information about a chart, pause on a chart element to display a tooltip. For example, in the Supplier By Region Metrics map, you can see the number of suppliers in the region in the tooltip.

Language Display

You can change the Supplier 360 user interface to a different language.

Supplier 360 displays the default language of the user interface the first time you log in. After you log in to Supplier 360, you can select a language in the header area. When you view the Login page the next time, Supplier 360 displays the last used language of the user interface.

Managing Tasks

A task represents a step in a business process. A workflow consists of a sequence of steps. For example, supplier approval might be a workflow that consists of a sequence of steps that the authorized users must follow to approve a supplier.

The user role determines the privileges that a user has and the task that the user can perform. For example, a Finance Manager user can review and edit the banking and tax details of a supplier but cannot edit the commodity or other details. A Compliance Manager user can assess the risks associated with a supplier but cannot edit the banking details of the supplier.

If you have the administrative access, you can view and administer the tasks that are assigned to other users and administer the unassigned tasks. You can review and maintain the tasks by reassigning the tasks, changing the task priority, adding comments, and setting the due dates.

Sorting and Filtering Tasks

You can sort and filter the list of tasks in the task inbox. For example, you might want to review edited records before you review merge proposals.

The task inbox contains quick filters and column filters. You can use these filters in combination to get specific results. For example, to see high priority tasks assigned to you, select the **My Open Tasks** quick filter and set the Priority column filter to `High`. In logical terms, filters are joined by the AND operator.

Note: You can set one column filter at a time. For example, you can narrow your list to Organizations and then further restrict the results to show only the Merge tasks for organizations.

1. In the navigation bar, click **Home**.

   The task inbox appears.

2. To sort the list of tasks by a field, click the column heading with that field name.
   For example, to sort tasks by task type, click the **Task Type** column heading.

Sorts the tasks based on the values in the selected column. An up arrow beside the column heading indicates that the values are sorted in ascending order. A down arrow indicates descending order.

Note: By default, the task inbox sorts tasks case insensitively. If the number of tasks to sort is more than the value of the `CompositePagerTotalRecords` property, case-sensitive sorting is database dependent. For more information about the `CompositePagerTotalRecords` property, see the *Multidomain MDM Data Director Implementation Guide*.

3. To filter the list of tasks, set filter criteria in any order.

   - To filter tasks by the most commonly used criteria, select one of the following quick filters:

Filter	Description
My Open Tasks	Shows your open tasks.
My Closed Tasks	Shows the tasks that you closed.
All Tasks	Shows all the closed, claimed, and unclaimed tasks that are assigned to your user group.
All Unclaimed Tasks	Shows all the unclaimed tasks that are assigned to your user group.
All Closed Tasks	Shows all the tasks that the users in your user group closed.
All Claimed Tasks	Shows all the tasks that the users in your user group claimed.

   - To filter tasks based on the values of column headings, enter appropriate values for the following column headings:

Column	Description
Task Title	Shows tasks that contain the specified text. Enter the text that you want to search for in the task titles.
ID	Shows the tasks based on the value that you enter.
Type	Shows tasks with the selected task type. Select a task type from the list, such as **Final Review** or **Merge**.
Priority	Shows tasks with the selected priority, such as **High**. Select a priority from the list.
Due Date	Shows tasks that are overdue or due in a specific period. Select a due date option from the list.
Status	Shows tasks with the selected status, such as **Open** or **Closed**. Select a status from the list.
Owner	Shows tasks that are assigned to the user. Enter a user name.
Creator	Shows tasks that the specified user created.
Creation Date	Shows tasks that are created during a specific period of time. Select a creation date option from the list, such as **Last 7 days** or **Custom range**.

4. To remove filters, click the **Clear Filter** icon.

Configuring the Columns for the Task Inbox

By default, the task inbox displays the columns that the administrator configured for all the quick filters. For each quick filter, you can add or remove the available columns.

1. In the navigation bar, click **Home**.

    The task inbox appears.
2. Select a quick filter for which you want to configure the columns.
3. Click **Table Settings**.

    The **Table Settings** dialog box appears.
4. To add a column heading, in the **Available Fields** section, select a field and click **Add**.
5. To remove a column heading, in the **Selected Fields** section, select a field, and click **Remove**.
6. Click **OK**.

Supplier 360 Dashboard View

The Supplier 360 Dashboard view is shipped with Supplier 360. The Supplier 360 Dashboard view displays a business view of the supplier. You can click a supplier record to view detailed information about the supplier.

You can view supplier details, such as company overview, supplier contacts, onboarding time for the supplier, product category of the supplier, alternate suppliers, supplier relationships with other suppliers in a hierarchical format, documents uploaded by the supplier, and supplier documents that are due for renewal.

The Hierarchies panel displays how a supplier is related to other suppliers or contacts in a hierarchical format. A supplier can belong to multiple hierarchies. If an MDM Hub administrator defines a default hierarchy, the Hierarchies panel displays the default hierarchy for the supplier. Otherwise, the Hierarchies panel displays a list of hierarchies to which the supplier belongs. You can then select a hierarchy that you want to view. After you select a hierarchy, you can click a supplier or contact to view the supplier or contact details.

CHAPTER 3

Adding Records

This chapter includes the following topics:

Adding Record Overview

A supplier record is added in the following scenarios:

- A business user approves a supplier application that the supplier submits through the Supplier Portal.
- A business user creates a supplier profile in Supplier 360.
- Business application and other systems in your organization that contain supplier information generate a record.

Suppliers Applying on the Supplier Portal

Supplier representatives can discover the Supplier Portal through an internet search, register on the Portal, and fill out the online application form. A business manager can also register a supplier on the Supplier Portal and then invite a supplier representative to fill out an application.

Unsolicited and solicited applications go through the same qualification business process. After business users approve a supplier application, the supplier records that contain the supplier information change from a pending state to an active state. This change in state is all that is required to convert the supplier application to a supplier profile.

Business Managers Adding Supplier Records

Business managers can use Supplier 360 to create a supplier record.

Supplier applications can arrive through avenues other than the Supplier Portal, such as through paper application forms distributed at conferences. You might want to create the initial supplier record from a paper application, and then invite the supplier to register on the Supplier Portal.

You also might need to create a supplier record for suppliers who do not want to perform this administrative task themselves.

Adding Records Overview

To add records based on a business entity, use the **New** tab with the **Business Entity** option and select a business entity. For example, select **Supplier** business entity.

Note: In the **New** window, if you see both the **Business Entity** option and **Subject Area** option, ask the MDM administrator which one to use. The **Business Entity** option opens an entity tab while the **Subject Area** option opens the **Data** tab.

The MDM administrator defines the business entities, including the data and structure. The administrator also designs the layout of the record view that opens when you create a record. Your application can have one or more record views.

You might see the following panels in your record view when you create a record:

Record Details panel

> The main panel in the record view is the data entry form. Required fields are marked.

Similar Records panel

> If the record view contains the Similar Records panel, as you enter data in required fields, Supplier 360 generates a list of similar records for your review. Review the similar records before finishing the form. If you find the record already exists, you can edit the existing record instead of adding a new record. If you are uncertain whether a similar record is the same record that you want to add, continue adding the new record. If you add a duplicate record, Supplier 360 can find and consolidate matching records for you.

Adding a Record

You can use Supplier 360 to add a record and send the record for review and approval. The record remains in the pending state until the record is rejected or approved.

Note: If the application environment includes Product 360, when you create a supplier profile, the application creates a matching supplier in Product 360. Product 360 restricts supplier names to 50 characters or fewer. You must enter a supplier name that complies with this restriction or the supplier activation in Product 360 fails.

To add a record, log in to Supplier 360 application, and then perform the following steps:

1. In the navigation bar, click **New**, select a business entity, and then click **OK**.

    An entity tab opens and displays the data entry form for the business entity. Required field are marked.

2. For each required field in the form, click the field, and type a value.

    The following image shows a sample data entry form for a Supplier business entity.

1. Navigation menu
2. Required field indicator

3. If the **Similar Records** panel contains a list of similar records, review them.

   a. In the **Similar Records** panel, click the information icon beside the name of a record.

   b. Check the other data values to see if the record is the same as the one you are adding.

   - If it is the same record, click **Use this record**. When prompted for confirmation, click **Yes, proceed**. The work-in-progress record is discarded and the tab closes. The selected record opens in an entity tab. You can edit data as required.

   - If it is not the same record, click **Close**.

   c. Review other similar records in the same way.

   d. If a record does not exist, return to the tab containing the work-in-progress record.

4. In the data entry form, add data in the optional fields.

   a. Fill in the fields.

   b. Optionally, add an image. Type a valid URL in the image field.

   Note: For best results, use an image that is a maximum of 200 x 200 pixels. For images, the MDM Hub stores the URL, not the file. If the location of the file changes, you must update the URL.

   c. Click the **Apply** icon.

5. If the data entry form includes sections for child records, add child records to the sections.

   a. In the navigation menu, click a section name, such as **Address** or **Phone**.

   The view scrolls to the selected section.

   b. Click **Create Child Record**.

   The data entry form for the child record appears.

   c. Fill in the fields.

   The following image shows a sample **Address** section in the form view:
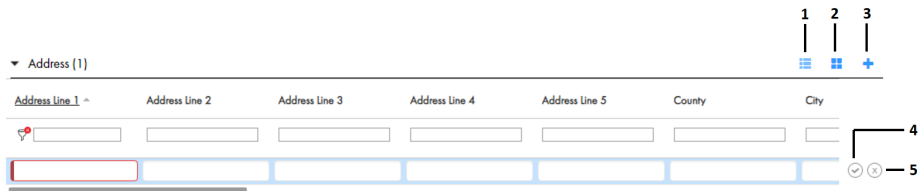
1. **Table** view
2. **Form** view
3. **Create Child Record**
4. **Apply**
5. **Discard**

    d.   Click the **Apply**.

6.   After you finish adding data, click **Save**.

A message confirms that the record was created successfully. If your user role permits you to save data without a review, the application saves the record to the MDM Hub Store as an active record. Otherwise, the application saves the record as a pending record and initiates the review process associated with your role.

Supplier Profiles Generated from Source Systems

The MDM Hub administrator adds source systems that contain supplier data as data sources to the MDM Hub. The MDM Hub creates supplier profiles based on the source data and identifies potential matches.

Depending on how the Application is configured, you might be asked to participate in the review process for some or all of the generated supplier profiles.

Inviting Suppliers to Register on the Supplier Portal

After you verify generated supplier profiles, you can invite supplier representatives to sign into the Supplier Portal. Supplier representatives can review and update their supplier profile.

CHAPTER 4

Finding Records

This chapter includes the following topics:

Finding Records Overview

You can use the search box to perform a full-text search. You might want to search for records that you want to view, edit, or delete.

Your Supplier 360 application might be configured to use search with Solr or Elasticsearch. When your application is configured to use Elasticsearch, at a time, you can search for records within a single business entity. This is different from search with Solr, where you could either search across all the business entities or within a specific business entity.

Finding Records in an Elasticsearch Environment

Use the search box to find a record.

1. In the **Search** box, select a type of business entity from the list.

   Tip: The Search list contains the types of business entities that you have permission to view. If the list is empty, contact your MDM administrator to request permission.

2. In the **Search** box, perform one of the following tasks:

   - Type the complete search string or the search string with the asterisk wildcard character (*) for the record that you want to find. You can use the wildcard character at the end of the search string or in between the search string. For example, if you want to search for John, you can specify `Jo*` or `J*n`.

   - If the search is configured to suggest search strings, type a few characters of the search string, and select one of the suggested values as the search string.

     Note: The values are suggested when you search within a single business entity type.

   If the search results must contain the words in the search string, add the + operator before each search word.

3. Click the **Search** icon.

   The search results appear in the **Search Results** panel.

4. To refine the search results, you can apply filters.
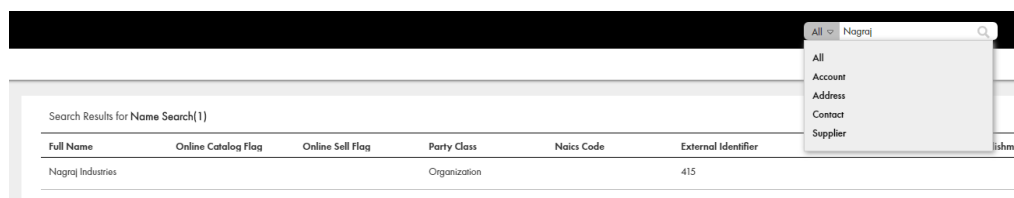
Finding Records in a Solr Environment

Use the search box to find a record.

1. Optionally, in the **Search** box, select a type of business entity from the list.

   By default, **All** is selected, and Supplier 360 searches within all the business entity types. Also, you can select a specific business entity within which you want to search for records.

   Tip: The Search list contains the types of business entities that you have permission to view. If the list is empty, contact your MDM administrator to request permission.

   The following image shows the business entity type list:

2. In the **Search** box, perform one of the following tasks:

   - Type the complete search string or the search string with the asterisk wildcard character (*) for the record that you want to find. You can use the wildcard character at the end of the search string or in between the search string. For example, if you want to search for John, you can specify `Jo*` or `J*n`.

   - If the search is configured to suggest search strings, type a few characters of the search string, and select one of the suggested values as the search string.

     Note: The values are suggested when you search within a single business entity type.

   If the search results must contain the words in the search string, add the `+` operator before each search word.

   If the search string includes any of the following special characters, add a backslash as a prefix to the special character: `+ , - , & , || , ! , ( ) , { } , [ ] , ^ , " , ~ , ? , : , \`. If you do not add a backslash as a prefix to each special character, the search might return no results or incorrect results. For example, if you want to search for `AT&T`, the search string must be `AT\&T`.

   If you want to search for a negative value, type the value in the search string without the minus character. For example, if you want to search for `-5000`, the search string must be `5000`.

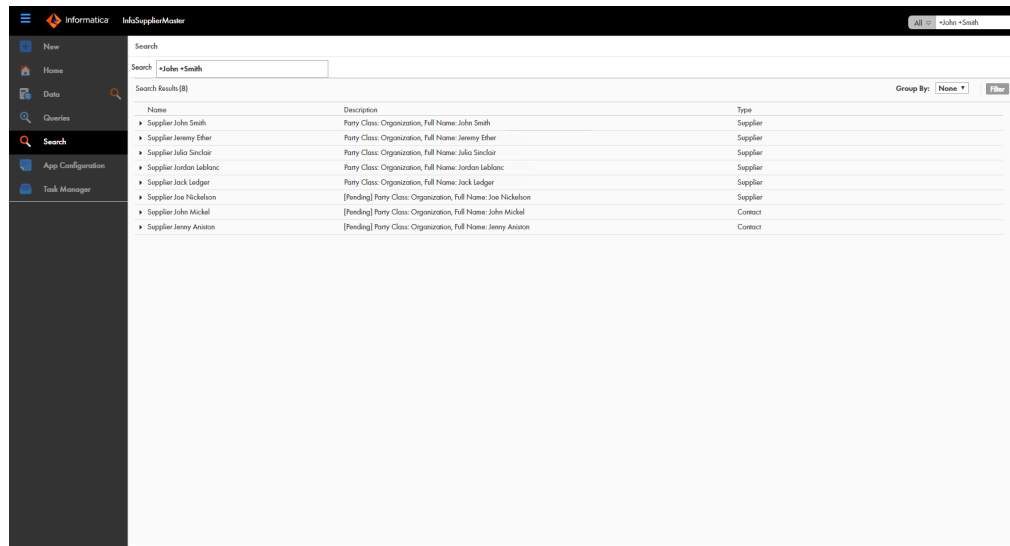   If you want to search a date, use a simple date format, such as `<Month> <DD> <YYYY>`, in any order and do not use a date format, such as `<YYYY>-<MM>-<DD>` or `YYYY-MM-DDThh:mmTZD`. For example, use November 20 2014 or 2014 Nov 20 as the search string.

   The following image shows the **Search** box with the search string, John Smith:

3. Click **Search**.

The following image shows the search results in the search page:

4. Optionally, you can group the records that appear in search results based on the business entity types.

   The search results are sorted and moved to the relevant business entity type groups.

5. To find the record that you are searching for, expand the business entity type under which you expect to find the record.

Using Queries to Find Records

Use a search query, when you want to repeatedly perform the same search and filter operation. When you use search queries, you specify a criteria for your search. You might want to use queries to find records that you want to view, edit, or delete.

To create and manage queries, use the **Queries** page. You can create a query to search for records based on a specific business entity. To reuse the query that you create, save the query. If you use a query frequently, you can set it as the default query.

When you create a query with a lookup field that is dependent on other lookup fields, these other lookup fields are automatically included in the query. For example, the City lookup field is dependent on the State and Country lookup fields. When you create a query to include only the City lookup field, the State and Country lookup fields are automatically included in the query.

Creating a Query

You can create a query to search for records within a specific business entity. You are the owner of the queries that you create.

1. In the navigation bar, click **Queries**.

2. In the **Saved Queries** panel, click the **Add** icon.

   The **New Query** dialog box appears.

3. From the **Business Entity** list, select the business entity within which you want to perform the search.

4. Select a query type.

Query Type	Description
Basic	Uses simple text comparisons to find records that contain the query values.
Extended	Uses matching logic and match-enabled attributes to find records that contain the query values.

5. If you selected the extended query type, from the **Match Rule Set** list, select a match rule set.

   Select the **Default** match rule set only when a suitable match rule set does not appear in the list. A match rule is generated based on the values that you specify.

   The fields available for the selected match rule set appear.

6. Select the fields that you want to include as the search criteria for the query.

   The fields that you selected appear in the **Selected Fields** section.

7. In the **Selected Fields** section, drag to rearrange the sequence of the fields.

   The fields appear in the query form in the sequence that you set.

8. Specify the search results options.

   a. If you want the query to be case sensitive, enable the **Case sensitive** option.

   b. If you want the search results sorted, from the **Sort By** list, select a field name by which you want the search results sorted.

   c. Select the sort order of the query to be ascending or descending.

9. Click **OK**.

   The query is created and opens on the Queries page.

10. To save the query for reuse, click **Save**.

    The **Save Query** dialog box appears.

11. Enter a query name and description.

12. If you want to use the query as a default query, enable **Set as my default**.

    The default query is the query that appears when you open the **Queries** tab.

13. If you want to share the query with other users, enable **Share with all**.

    By default, you own the query that you create. Other users cannot edit the queries that you own.

14. Click **Save**.

    The query is saved and appears on the **Saved Queries** panel.

You can run the query that you created, or save the query and run it when needed.

Running a Query

You can run a query to find records. To run a query that is not saved, enter the search criteria, and then run the query. To run a saved query, first, open the query.

1. In the **Saved Queries** panel, open the query that you want to run.

   a. If a default query is open, but you want to run a saved query, click the **Back** icon to navigate to the **Saved Queries** page.

   b. Expand the business entity to which the query belongs.

       c.   Click the query name.

           The query form appears.

2.   Enter the search criteria for the record that you want to find.

3.   Click **Run**.

    The query results appear in the **Search Results** panel.

Viewing Query Results

After you run a query, you can view the query results that appear in the **Search Results** panel.

You can open records from the **Search Results** panel. Before you open a record, you can preview the record. The preview appears in the **Record Preview** window.

The **Record Preview** and the **Business Entity** view can display the parent records and up to ten levels of child records. The top two child record levels are expanded. To view the child record levels that are deeper, expand the record levels.

You can customize the results to view only the fields that are significant to your purpose. Also, you can export the results to a CSV file.

Opening Records from Query Results

After you run a query to find records, you can open the records from the **Search Results** panel.

1.   From the **Search Results** panel, select the record that you want to open.

2.   Optionally, to verify that you have the correct record, preview the record.

       a.   Click the **Show Preview** icon.

           The **Record Preview** displays the record details.

       b.   After you preview the record, click **Close**.

3.   To open the record, click the **Open in a new window** icon.

    The record opens in the **Business Entity** view. You can view and edit the record.

4.   If you want to view other information about the record, from the **View** list, select a record view.

    Note: The record views that appear in the **View** list depend on the Data Director configuration and your user role privileges.

    The following views might be available:

View	Description
Cross-reference Records	Displays the records that contribute to the best version of the truth of a record. You can unmerge a record that was merged with another record.
Matching Records	Displays the records that match the record that you opened. You can identify and resolve duplicate records.
Hierarchy	Displays a diagram that shows how a record is related to other records. You can add, edit, and delete related records and relationships for the selected records.
History	Displays data changes over the lifespan of the record. You can identify the data events that changed the data.

The record opens in the selected view.

Managing Queries

After you save queries, you might want to modify a query or delete a query that you do not need.

To manage queries, you can perform the following tasks:

- Edit a saved query.
- Delete a saved query.
- Save an existing query as a new query.

Note: The extended queries use match rule sets. If an MDM administrator edits or deletes a match rule set from the Hub Console, the related queries are deleted from the Data Director application.

Editing a Saved Query

Use the **Saved Queries** panel to edit queries. You can edit any query that you own. You own the queries that you create or import into your environment.

1. In the **Saved Queries** panel, expand the business entity, and click the query.

   The query opens.
2. Click **Actions** > **Edit Query**.

   The **Edit Query** dialog box appears.
3. Edit the query as required.

   You can make the following changes to the query:
   - Add fields.
   - Remove fields.
   - Enable the query to be case-sensitive.
   - Select a field name by which the query result must be sorted.
   - Set the sort order to ascending or descending.
4. Click **OK**.

   The query is updated. You can save or run the query.
5. Save or run the query.

Deleting a Saved Query

For each business entity, you can delete the queries that you own.

1. In the **Saved Queries** panel, expand the business entity.
2. Select the query, and then click **Actions** > **Delete**.

   The delete confirmation dialog box appears.
3. To delete the query, click **Yes**.

   The query is deleted.

Saving an Existing Query as a New Query

Instead of starting from scratch, you can use an existing query to create more queries. You can either select or open an existing query, and then save the it as a new query.

1. In the **Saved Queries** panel, select the query that you want to save as a new query.

2. Click **Actions** > **Save As**.

    The **Save As** dialog box appears.

3. Enter a unique name and description for the query.

4. Optionally, enable any of the following query options:

    - Set as my default. The query becomes the default query.

    - Share with all. The query is shared with other users.

5. Click **Save**.

    A copy of the query is saved with the new name, and the query opens.

6. Optionally, modify the new query.

    a. Click **Actions** > **Edit**.

    b. Edit the query as required.

        You can make the following changes to the query:

        - Add fields.

        - Remove fields.

        - Enable the query to be case-sensitive.

        - Select a field name by which the query result must be sorted.

        - Set the sort order to ascending or descending.

    c. Click **OK**.

        The query is saved with the changes.

CHAPTER 5

Approving Supplier Records

This chapter includes the following topics:

Supplier Approval Overview

The approval process begins when a supplier submits an online application or a business user creates a supplier profile. A review process is an automated business process workflow that notifies business managers and data stewards when changes are ready for their review.

Supplier Record Approval Process

The default process to approve a supplier includes four steps. Your administrator might set up a different process.

For example, the following diagram shows an overview of the default approval process that is used when a supplier submits an online application. The dark blue fill identifies the people activities.
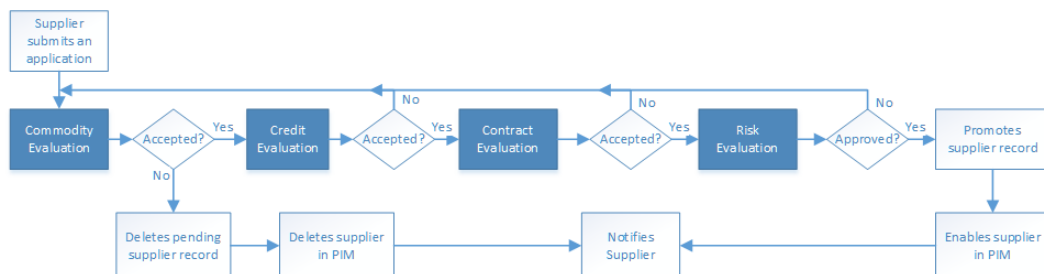
The first people activity is the commodity evaluation, which requires a commodity manager to review the application. If the commodity manager accepts it, the application moves on to a credit evaluation and then a

contract evaluation. The last approval step is a risk evaluation. If the compliance manager believes the risk is acceptable, the manager approves the application. At any stage, a manager can reject the application. The process automatically sends the supplier representative an email with the results of the review.

The following table summarizes the people activities within the process, the required role, and the possible actions:

People Activity	Role Assigned	Possible Actions
Commodity Evaluation	CommodityManager	- Accepts the application. This action sends the application onto the Credit Evaluation step. - Rejects the application. This action deletes the pending record containing the changes. - Disclaims the task with an explanation so that someone else can claim it.
Credit Evaluation	FinanceManager	- Accepts the application. This action sends the application onto the Contract Evaluation step. - Rejects the application with explanation. This action sends the application back to the Commodity Evaluation step. - Disclaims the task with an explanation so that someone else can claim it.
Contract Evaluation	ContractManager	- Accepts the application. This action sends the application onto the Risk Evaluation step. - Rejects the application with explanation. This action sends the application back to the Commodity Evaluation step. - Disclaims the task with an explanation so that someone else can claim it.
Risk Evaluation	ComplianceManager	- Approves the application. This action applies the changes to the master data. - Rejects the application with explanation. This action sends the application back to the Commodity Evaluation step. - Disclaims the task with an explanation so that someone else can claim it.

Task Manager

Use the Task Manager to organize, claim, and resolve tasks that are generated by review processes.

To go to the Task Manager, in the navigation bar, click **Task Manager**. Alternatively, you can click the title of a task from the task inbox in the **Home** page. In this case, the Task Manager displays the selected task and its associated record.

The following image shows the Task Manager with a task selected:
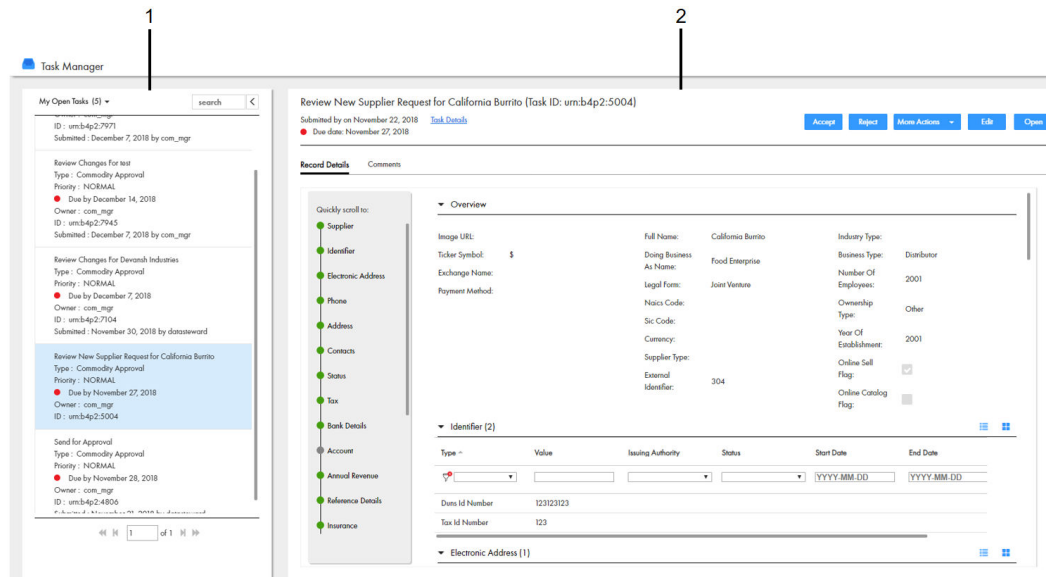
1.   Task Panel

2.   Review Panel

Task Inbox of Task Manager

The task panel lists the details of the tasks. You can use the predefined filters to select the type of tasks that you want to view in the task panel.

When you open the Task Manager from the navigation bar, the task panel displays all the tasks. When you open a task from the task inbox of the **Home** page, the task panel displays only the details of the selected task.

The following image shows the task panel of the Task Manager:
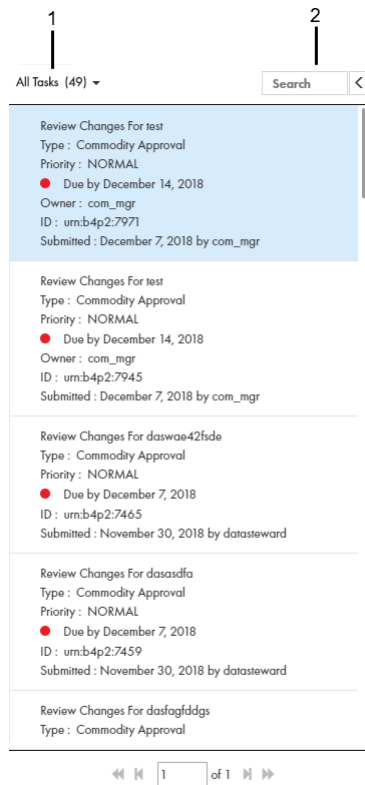
1. Quick filters
2. Search

The following table lists the user interface elements of the task panel :

User Interface Element	Description
Quick filters	Filters the tasks based on the predefined filter that you select. Use one of the following filters: - My Open Tasks. Shows your open tasks. - My Closed Tasks. Shows the tasks that you closed. - All Tasks. Shows all the closed, claimed, and unclaimed tasks that are assigned to your user group. - All Unclaimed Tasks. Shows all the unclaimed tasks that are assigned to your user group. - All Closed Tasks. Shows all the tasks that the users in your user group closed. - All Claimed Tasks . Shows all the tasks that the users in your user group claimed.
Search	Searches the displayed tasks for the specified text.

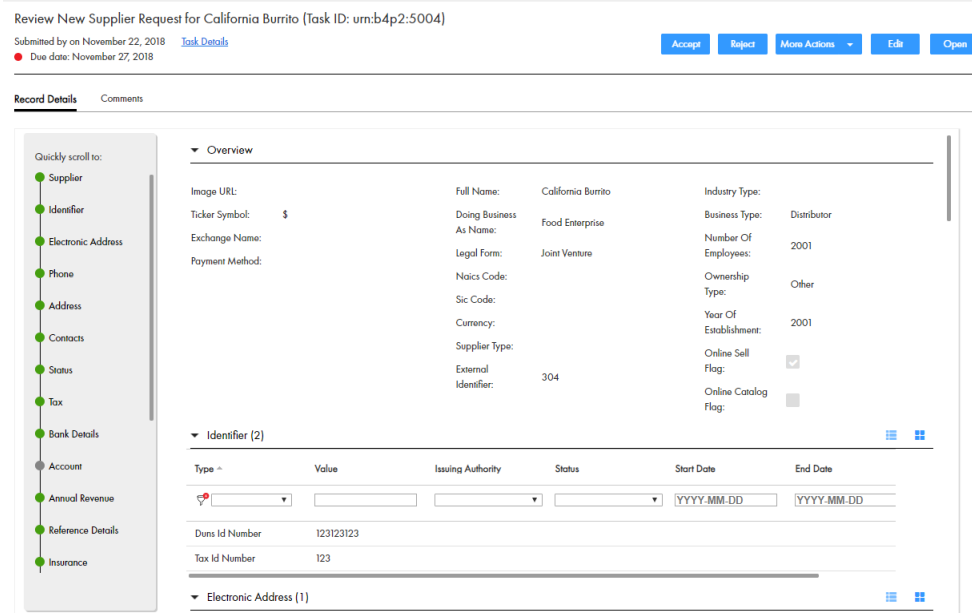The following table lists the details that the task panel can display :

Task Detail	Description
Task Title	A link that displays a short description of the review task. To review the record and take action on the task, click the task title. The task opens in the Task Manager and displays the associated record in the review panel. If your role permits it, you can edit the record from this view before taking action on the task.
Type	Name of a people activity within the process.
Priority	Priority of the task. The task priority can be Low, Normal, or High. When generating tasks, the review process assigns the same priority to all tasks of the same type.
Task Status and Due Date	Status of the task and the date the task is due.
	Status of the task can be Open or Closed. When the task status is Open, you can view the record associated with the task.
	The review process calculates a default due date based on the task creation date plus a predefined time period.
	The due date of each task is prefixed with one of the following colored dots:
	- Green. Indicates that the task is not overdue.
	- Red. Indicates that the task is overdue.
	- Amber. Indicates that the task will be overdue in the next 24 hours.
Owner	Name of the signed-in user.
ID	Instance ID of the review process that generated the task.
Submitted Date and Creator	Name of the user who created the task, and the date on which the user created the task.

Note: If you and your colleagues require different task details, contact your MDM administrator. The MDM administrator can update the application to display the desired details.

Task Manager Review Panel

Use the review panel to review the changed record, the comments added to the task, and the workflow diagram. The content of the review panel differs based on the type of change that was made to the record.

The following image shows a record in the review panel:

The following table describes the elements in the review panel:

Element	Description
Record Details	Displays the details of the record associated with the task.
Comments	Displays a list of comments added to the task.
Workflow Diagram	Displays a graphical representation of the process flow associated with the task. You can view the workflow diagram only if you have the ActiveVOS abAdmin role assigned.
Task Details	Displays the task details in edit mode.
Actions	Actions that you can perform on the task. The possible actions depend on the task definitions in the review process. Sample actions can be Approve, Reject, and Disclaim.
More Actions	Additional actions that you can perform on the task.
Edit	Opens the record in edit mode.
Open	Opens the record in a separate tab.

Claiming Tasks

Multiple users can share the same reviewer role. To work on a task, you must claim the task. This ensures that other users cannot work on the task while you work on it. Before you can claim a task, check for comments or attachments.

1. Click **Task Manager**.

    The task panel contains a list of tasks.

2. In the task panel, select **All Unclaimed Tasks**.

    The task panel lists all the unclaimed tasks of your user group.

3. Select a task that you want to claim.

    The record appears in the review panel.

4. Optionally, review the comments and attachments.

    a. Click the **Comments** tab, and then review the comments.

    b. Click **Task Details**.

    c. Download attachments in the **File Attachments** section.

    d. Click **Cancel**.

5. To claim the task, click **Claim**.

    The task panel is updated, and your user name appears in the **Owner** field of the task.

Resolving Tasks

You resolve a task by reviewing the new or changed record and then taking an action. The possible actions depend on the task definitions in the review process.

Reviewing Edited Records

When you open a task to review an edited record, the fields that contain edited values are marked.

In the MDM Hub Store, the proposed edits are contained in a cross-reference record that is set to the pending state.

1. In the task inbox of the **Home** page, click a task that is a request to review an edited record.

    The record opens in the review panel of the Task Manager.

    Note: If you open an unassigned task, be sure to claim it before you start work.

2. Optionally, review the comments and attachments.

    a. Click the **Comments** tab, and then review the comments.

    b. Click **Task Details**.

    c. Download attachments in the **File Attachments** section.

    d. Click **Cancel**.

3. Look for highlighted fields and decide if the edits are valid.

4. If you see a typographical error or an incorrect value for which you know the correct value, click **Edit**, and edit the field.

    Note: The next step depends on whether you have enough information to resolve the task or if you think someone else should assess it.

5. To resolve the task, click an appropriate action button, or click **More Actions** and select one of the following actions:

Action	Description
Approve	If you agree with the edits and the task type permits you to approve changes, click **Approve**. The ActiveVOS® Server marks the related Final Review people activity as completed and performs the next activity in the process.
Escalate	If you agree with the edits, but the task type does not permit approval at this point in the workflow, click **Escalate**. The ActiveVOS Server marks the related Review No Approve people activity as completed and performs the next activity in the process.
Reject	If you disagree with the one or more edits, click **Reject** and type an explanation in the Comment box. The ActiveVOS Server notifies the person who edited the record. **Note:** If a source system updates the rejected record, the record goes through the approval process again.
<Other>	If you see other options in the menu, then your organization uses a custom business process. If the purpose of the option is not clear and your role permits access to the ActiveVOS console, you can open the process to understand the workflow. Otherwise, contact the person who created the business process.

    The task is closed.

6. To change the ownership of the task without resolving the task, click an appropriate action button, or click **More Actions** and select one of the following actions:

Action	Description
Reassign	To ask another person to review the proposed changes, click **Reassign**, select the user, and type an explanation in the Comment box. The task is reassigned to the selected person. **Note:** If this option is not available, click **Task Details** and select the user from the **Assignee** list.
Disclaim	To return the task to the pool of unassigned tasks, click **Disclaim** and type an explanation in the Comment box. Someone with the same role needs to take action on the task.

    The task remains open, but is no longer assigned to you.

7. If prompted, add comments or attachments to provide additional information about the task.

    Note: Whether you are prompted and required to add a comment or attachment depends on the Data Director configuration. A red line appears to indicate required fields.

Reviewing New Records

When you open a task to review a new record, all field values in the record need to be validated. If you are one reviewer in a progressive multiple step review process, validate only the fields that you are responsible for validating.

In the MDM Hub Store, the parent record and child records are in the pending state until the new record is approved.

1. In the task inbox of the **Home** page, click a task that is a request to review a new record.

    The record opens in the review panel of the Task Manager.

    Note: If you open an unassigned task, be sure to claim it before you start work.

2. Optionally, review the comments and attachments.

    a. Click the **Comments** tab, and then review the comments.

    b. Click **Task Details**.

    c. Download attachments in the **File Attachments** section.

    d. Click **Cancel**.

3. Determine if the values in the record meet your business requirements.

    Note: The next step depends on whether you have enough information to resolve the task or you think someone else should assess it.

4. To resolve the task, click an appropriate action button, or click **More Actions** and select one of the following actions:

Action	Description
Approve	If you think the record is acceptable, and the task type permits you to approve it, click **Approve**. The ActiveVOS Server marks the related Final Review people activity as completed and performs the next activity in the process.
Escalate	If you think the record is acceptable, but the task type does not permit approval at this point in the workflow, click **Escalate**. The ActiveVOS Server marks the related Review No Approve people activity as completed and performs the next activity in the process.
Reject	If you disagree with the one or more values, click **Reject** and type an explanation in the Comment box. The ActiveVOS Server notifies the person who added the record. **Note:** If a source system updates the rejected record, the record goes through the approval process again.
<Other>	If you see other options in the menu, then your organization uses a custom business process. If the purpose of the option is not clear and your role permits access to the ActiveVOS console, you can open the process to understand the workflow. Otherwise, contact the person who created the business process.

The task is closed.

5. To change the ownership of the task without resolving the task, click an appropriate action button, or click **More Actions** and select one of the following actions:

Action	Description
Reassign	To ask another person to review the proposed changes, click **Reassign**, select the user, and type an explanation in the Comment box. The task is reassigned to the selected person. **Note:** If this option is not available, click **Task Details** and select the user from the **Assignee** list.
Disclaim	To return the task to the pool of unassigned tasks, click **Disclaim** and type an explanation in the Comment box. Someone with the same role needs to take action on the task.

The task remains open, but is no longer assigned to you.

6. If prompted, add comments or attachments to provide additional information about the task.

Note: Whether you are prompted and required to add a comment or attachment depends on the Data Director configuration. A red line appears to indicate required fields.

Approving a Supplier Application

A Compliance Manager has the authority to approve a supplier application. After the manager selects **Approve** from the list of task actions, the supplier representative receives an email containing the decision. On the Supplier Portal, the application displays the result of the qualification process.

Approved suppliers receive a personalized welcome email based on a template. The template can be customized to suit your organization. If you are interested in seeing a copy of the acceptance email sent to suppliers, contact your administrator.

Declining a Supplier Application

A Compliance Manager has the authority to decline a supplier application. After the manager selects **Reject** from the list of task actions, the supplier representative receives a email containing the decision. On the Supplier Portal, the application displays the result of the qualification process.

The supplier representative receives a personalized email based on a template. The template can be customized to suit your organization. If you are interested in seeing a copy of the rejection email sent to suppliers, contact your administrator.

Organizing Work on Tasks

When you have a long list of tasks, you can organize tasks by sorting and filtering the list, changing task properties, and assigning tasks to others.

For example, you might want to work on the tasks that have the highest priority or on the tasks that are due soonest. After you filter the list of tasks, you might find tasks that need a higher priority or that can be postponed. You can edit the task properties to better reflect the urgency within the business to resolve tasks. And, if you have the authority to assign tasks to managers, you can assign the task to a manager from the task properties.

Editing Due Date, Priority, and Other Task Properties

As you work with tasks, you might decide that some task properties need to be changed. For example, if changes are made to the record of an important client, you might want to increase the priority of the review task. Or, if you plan to be away and want to finish a set of tasks before you leave, you can change the due dates for the tasks to represent a date before your planned absence.

1. In the navigation bar, click **Task Manager**.

2. In the task panel, select the task you want to edit.

3. In the review panel, click **Task Details**.

   The following image shows the **Task Details** dialog box:

4. Edit one or more of the following fields to change the task properties:

Field	Description
Task Title	Enter a title that is more meaningful to you. A good title includes at least the name of the record and the change that initiated the review.
Priority	Select a priority that reflects the urgency within the business to resolve this change.
Due Date	Select a due date that reflects the urgency within the business to resolve the change.
Assignee	Reassign this task to someone else.

Field	Description
File Attachment	Attach files to provide additional information about the task. Attachments appear in the **Task Details** dialog box. **Note:** The **File Attachment** field is available only if the task supports attachments.
Add Comment	Add comments to explain edits to the task properties and to track questions and answers about the task. Comments appear in the **Comments** tab.
Assign Back to Pool	Return the task to the pool of unassigned tasks so that other users can claim the task. **Note:** The **Assign Back to Pool** button is available only if the task belongs to another user.

5. Click **Save**.

Assigning Your Tasks to Other Users

If the **Assignee** list is enabled in the **Edit Task** dialog box, you can reassign tasks.

Note: If you want to enable reassignments, contact your MDM administrator. The MDM administrator must implement a business process management (BPM) adapter that supports reassignments.

1. In the navigation bar, click **Task Manager**.

   The task panel contains a list of your assigned tasks and all unassigned tasks.

2. In the task panel, select **My Open Tasks**.

   The task panel displays all your open tasks.

3. Select the task that you want to assign to another user.

   The record appears in the review panel.

4. To provide additional information about the task, click **Task Details**, and then add a comment or a file attachment.

   Note: If you do not have the options for comments or attachments, contact your MDM administrator to request that they enable comments and attachments.

5. To assign the task, select the user from the **Assignee** list.

6. Click **Save**.

Assigning Tasks Back to the Pool

When a user in your user group is not available, you can send the user's tasks to the pool of unassigned tasks so that other users can claim them. The option to assign the tasks back to the pool is available only if the task belongs to another user.

1. Click **Task Manager**.

2. In the task panel, select the task that you want to send to the pool.

3. In the review panel, click **Task Details**.

4. Click **Assign Back to Pool**.

Disclaiming Tasks

If you claim or are assigned a task that you feel would be better handled by someone else, you can disclaim the task. Disclaimed tasks return to the pool of unassigned tasks.

1. Click **Task Manager**.
2. In the task panel, select an assigned task.

   The record appears in the review panel
3. In the review panel, click **More Actions** > **Disclaim**.
4. If prompted, add comments or attachments to provide additional information about the task.

   Note: Whether you are prompted and required to add a comment or attachment depends on the Data Director configuration. A red line appears to indicate required fields.

CHAPTER 6

Editing Records

This chapter includes the following topics:

Editing Records Overview

You might want to add or make changes to the information in a record. To make changes to a record, search for the record, and open the record in the **Business Entity** view.

If your user role permits it, you can edit the data or delete the record. When you save changes, based on your user role, a review process might be initiated. In this case, Supplier 360 saves the requested changes in a pending record until the review process ends. If the review ends in an approval, Supplier 360 applies the change from the pending record to the active records.

Editing a Record

If your user role includes the edit permission, you can edit a record in the active state.

Note: You cannot edit a record that is in the pending state because the record has changes that are pending approval. You must wait until the review and approval process ends.

1. From the **Search Results** panel of the **Search** page, open the record that you want to edit.

   The record opens in a record view.

2. If the view is not your preferred view for editing, you can select a different view from the View list.

3. Click **Edit**.

   Tip: If the button is disabled, either you do not have permission to edit the record or the record has changes that are pending approval.

4.   Edit the data in the parent record as required.

    a.   Click anywhere in the top section.

       The section becomes editable.

    b.   Edit the data.

5.   Edit the data in child records as required.

    a.   Expand the child section.

    b.   Click the **Edit** icon.

       The section becomes editable.

    c.   Edit the data.

    d.   Click the **Apply** icon.

6.   Click **Save**.

    If your user role permits you to save data without a review, the application saves the record to the MDM Hub Store as active records. Otherwise, the application saves the record as a pending record and initiates the review process associated with your role.

Viewing and Adding Related Records

Business entity relationships describe the affiliation between two entities. The MDM Hub supports one-to-many and many-to-many relationships between business entities, in addition to hierarchical relationships between records in the same business entity. You can add, view, edit, and manage relationships between a business entity and the records related to the business entity.

In the Related Records panel, you can see the business entities that you have permission to view. To create relationships between different types of business entities, your user role must include the edit permission for both types of business entities.

When a relationship exists between two entities, you can add related records to a business entity.

Note: If you do not see the Related Records panel when you edit a business entity, contact the MDM administrator.

Adding a Related Record

When a record has relationships configured, you can add related records to records. Search for and open the record in the **Business Entity** view. Search for the related record that you want to add as a related record and add the record in the **Related Records** panel.

Note: The **Related Records** panel must be present in the **Business Entity** view. To create relationships between different types of business entities, your user role must include the edit permission for both types of business entities.

1.   From the **Search Results** panel in the **Search** page, select the record to which you want to add the related records.

2.   Open the record.

    The **Related Records** panel displays the records that are directly related to the record you open. There might be more than one **Related Records** panel. For example, **Contact**, **Relationship**.

3.   In the **Related Records** panel, click **New**.

The **Add a Related Record** dialog box opens.

4.   Select the relationship type.

5.   In the **Search** box, type the complete search string or the search string with the asterisk wildcard character (*) for the record that you want to find.

6.   Click **Search**.

7.   In the **Filters** panel, select a value for the filter criteria that you require.

8.   Click **Apply Filter**.

The revised search results appear in the **Search Results** panel based on the filters you set.

9.   Select the record that you want to add as related record and click **Select**.

10.   If the relationship has additional attributes, specify the additional attributes.

11.   Click **Apply**.

The record is added as related record and appear in the **Related Records** panel.

Viewing Related Records

You can view the related records in the **Related Records** panel. Each related record in the component is a link that you can open in the **Business Entity** view.

Note: If your MDM administrator created a custom view for this purpose, the name of the view might be different.

1.   From the **Search Results** panel in the **Search** page, select the record.

2.   Open the record.

The related records are listed in the **Related Records** panel.

Deleting a Related Record

You can delete the relationship between a record and a related record. Search for the record and then delete the related record in the **Related Records** panel.

1.   From the **Search Results** panel in the **Search** page, select the record that you want to edit.

2.   Open the record.

The **Related Records** panel displays the records that are directly related to the record you open. There might be more than one **Related Records** panel.

3.   Select the related record that you want to delete, and then click the **Delete** icon.

A confirmation box appears.

4.   Click **Yes**.

Supplier 360 deletes the relationship between the record and the related record and no longer displays the related record in the **Related Records** panel.

Editing Related Records

You can edit the details of the relationship between a record and the related record. You can edit the additional attributes associated with the relationship. Search for the record and edit the relationship from the **Related Records** panel.

1. From the **Search Results** panel in the **Search** page, select the record that you want to edit.
2. Open the record.

    The **Related Records** panel displays the records that are directly related to the record you open. There might be more than one **Related Records** panel.
3. In the **Related Records** panel, select the related record that you want to edit, and then click the **Edit** icon.
4. Edit the additional attributes, and then click **Apply**.

Deleting a Record

If your user role includes the delete permission, you can delete records in the active state. You cannot delete a record that is in the pending state because the record is part of a workflow and is pending approval.

1. From the **Search Results** panel in the **Search** page, select the record that you want to delete.
2. Open the record.
3. Click **Actions** > **Delete**.

    A confirmation box appears.
4. Click **Yes**.

    Supplier 360 marks the record as deleted and no longer displays the record, but does not remove the record from the database.

CHAPTER 7

Managing Suppliers

This chapter includes the following topics:

Supplier Management Overview

If your administrator configured the Supplier Portal to make some pages non-editable, supplier representatives need to contact a business manager in your organization to make a change to the restricted information. A manager might also edit a profile to send alerts or make other data changes.

After updating a profile, the manager can send the update through a change approval process. The change approval process is similar to the approval process.

The Change Approval Process

The default change approval process is a four-step process. The process begins when a business manager creates or edits a supplier profile from Supplier 360. Your administrator might set up a different process.

For example, the following diagram shows an overview of the default process. The dark blue fill identifies the people activities.
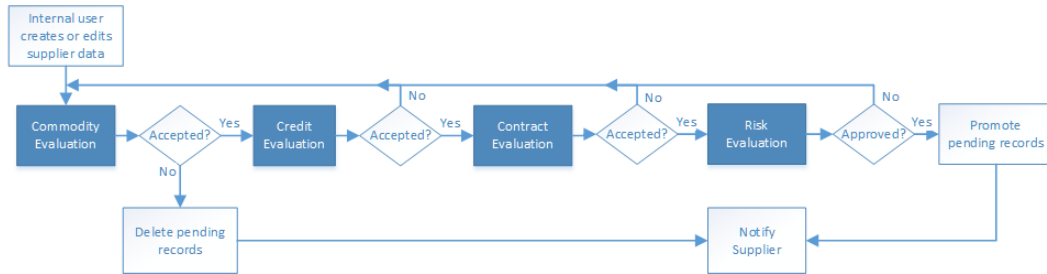
The first people activity is the commodity evaluation, which requires a commodity manager to review the update. If the commodity manager accepts it, the update moves on to a credit evaluation and then a contract evaluation. The last approval step is a risk evaluation. If the compliance manager believes the risk is acceptable, the manager approves the update and notifies the supplier. At any stage, a manager can reject the update.

The following table summarizes the people activities within the process, the required role, and the possible actions:

People Activity	Role Assigned	Possible Actions
Commodity Evaluation	CommodityManager	- Accepts the update. This action sends the update onto the Credit Evaluation step. - Rejects the update. This action deletes the pending record containing the changes. - Disclaims the task with an explanation so that someone else can claim it.
Credit Evaluation	FinanceManager	- Accepts the update. This action sends the update onto the Contract Evaluation step. - Rejects the update with explanation. This action sends the update back to the Commodity Evaluation step. - Disclaims the task with an explanation so that someone else can claim it.
Contract Evaluation	ContractManager	- Accepts the update. This action sends the update onto the Risk Evaluation step. - Rejects the update with explanation. This action sends the update back to the Commodity Evaluation step. - Disclaims the task with an explanation so that someone else can claim it.
Risk Evaluation	ComplianceManager	- Approves the update. This action applies the changes to the master data. - Rejects the update with explanation. This action sends the update back to the Commodity Evaluation step. - Disclaims the task with an explanation so that someone else can claim it.

Viewing Supplier Data

Supplier 360 comes with a supplier view menu that gives you the option to view suppler data from various perspectives. You can view supplier data by using the different views. Search for a supplier and open the supplier profile.

You can see the following views in Supplier 360:

Supplier Dashboard

Displays a business view of the supplier, such as supplier details, onboarding time, documents uploaded and documents due for renewal, and alternate suppliers.

Matching Records

Displays supplier profiles that are potential matches to the selected supplier profile. You can select records that are potential matches as merge candidates. You can preview the result of a merge between the business entity and the merge candidates that you select.

Business Entity

Displays all details of the supplier. Use the view to edit the supplier data.

Cross-reference

Displays the best version of the truth for the supplier and the cross-reference records that have merged with the supplier record. The cross-reference records are organized by the source system from which they originated. Use the Cross-reference view to track the source and lineage of the supplier data.

History

Displays a chronology of changes in the supplier data. You can view the data that existed in the supplier recorded at any point in time in the chronology. View the data before a data event and after a data event to determine if the event caused the inappropriate data change. You can view the best version of the truth for a supplier record at a specific points in time, and then compare the differences.

Timeline

Displays a timeline that shows the effective periods of a supplier. You can get a two-dimensional visibility into data. The two-dimensional visibility into data is based on the effective period and history of records. The effective period is the period of time for which a record is effective.

Hierarchy

Displays how a supplier profile is related to other supplier profiles. Use the Hierarchy view to identify, understand, and manage the relationships that exist between supplier profiles.

Onboarding Status

Supplier profiles have an onboarding status, which is set and updated as the supplier progresses through registering on the Supplier Portal, submitting an application, and finally being approved or declined as a supplier.

The following table describes the onboarding status values:

Onboarding Status Value	Description
Registered	A supplier representative registered the supplier organization on the Supplier Portal.
Submitted	A supplier representative completed the online supplier application form and submitted the form.
Approved	The supplier application passed the qualification process.
Rejected	The supplier application failed the qualification process.
Deactivated	A manager deactivated a previously approved supplier for business reasons, such as noncompliance. Representatives from a deactivated supplier can no longer log into the Supplier Portal.

Deactivating a Supplier

You can deactivate an approved supplier. For example, you might want to deactivate suppliers who do not upload current compliance documents after repeated reminders.

1. Find and open the supplier profile.
2. Expand the **Status** area.
3. Click the **Edit** icon.
4. In the Party Status Type field, select **Onboarding Status** from the list.
5. In the Party Status Value field, select **Deactivated** from the list.
6. Optionally, set the effective dates.
7. Click **Apply**.

Reactivating a Deactivated Supplier

You can reactivate a deactivated supplier by setting the onboarding status. For example, you might want to reactivate suppliers when their documentation is up to date.

1. Find and open the supplier profile.
2. Expand the **Status** area.
3. Click the **Edit** icon.
4. In the Party Status Type field, select **Onboarding Status** from the list.
5. In the Party Status Value field, select **Approved** from the list.
6. Optionally, set the effective dates.
7. Click **Apply**.

Creating Hierarchical Relationships Among Suppliers

If your administrator enabled hierarchies for the Application, you can create relationships for a supplier. For more information about hierarchies, see the Data Director online help.

Sending an Update for Approval

After you complete your edits, you can send the edited supplier profile through the change approval process.

1. Edit the supplier profile as required.
2. After you edit all affected areas and apply changes, click **Send for Approval**.

    The **Create Task** dialog box opens with default values for all task attributes.
3. In the Title field, replace the default title with a meaningful title for this workflow.
    For example, if you edited banking information for XYZ Supplies, you might enter the title Updating XYZ Supplies-Bank Information.
4. In the Task Type field, you can see the name of the approval process that is initiated. If a drop-down arrow appears on the field, you might be able to select a different process.
5. Change other default task attributes as required.
6. Click **OK**.

    The ActiveVOS Server begins executing activities. When the ActiveVOS Server reaches the first people activity in the process, it creates a task of the correct task type. The ActiveVOS Server sends the task to the users who have the role associated with that task type.

Reviewing an Updated Supplier Profile

If your role requires you to review updates to supplier profiles, you receive task notifications in your Task Inbox. Before you begin working on a task, you claim it.

1. In the **Task Inbox**, select one of your claimed tasks and click **Open**.

    The supplier profile opens in the Data tab. A note at the top of the page indicates that the supplier profile is in a pending state. Icons mark the areas with changed data.
2. For each area with a change icon, review all changed data to see if the changes meet your business standards.
3. After you finish the review, click **Task Actions** and select an appropriate action.

    - If you agree with the update and the task type permits you to approve updates, click **Approve**. The ActiveVOS Server marks the related Final Review people activity as completed and performs the next activity in the process.
    - If you agree with the update, but the task type does not permit approval at this point in the workflow, click **Accept**. The ActiveVOS Server marks the related Review No Approve people activity as completed and performs the next activity in the process.

- If you disagree with the update, click **Reject** and type an explanation in the Comment box. The task is reassigned to the person who initiated the update.

- If you think that you are the wrong person to assess the validity of this update, click **Disclaim** and type an explanation in the Comment box. Someone with the same role needs to take action on the task.

Uploading Product Catalogs

If your organization uses a Product Information Management (PIM) system, you can continue to upload product catalogs from the PIM interface. If the PIM system is integrated with the Application, suppliers can view and upload product catalogs from the Supplier Portal.

Deleting a Supplier Profile

When you delete a supplier profile, the profile is soft-deleted, that is, the supplier record is assigned a hub state of -1. You can restore soft-deleted profiles.

Note: If a profile has contacts, the contacts are not soft-deleted. Contacts are separate entities that are associated with a supplier profile. To delete a contact, search for it and delete it.

1. Open the supplier record.
2. Open the **Actions** menu, and click **Delete**.
3. When prompted for confirmation, click **Yes**.

CHAPTER 8

Communicating with Suppliers

This chapter includes the following topics:

Communicating with Suppliers Overview

You can find the contact information for suppliers in their supplier profile. You can also create alerts, which supplier representatives can see in the supplier dashboard on the Supplier Portal. Notifications and alerts can be selectively communicated to your suppliers.

Notifications and Alerts

You can communicate with suppliers by creating supplier alerts in their supplier profiles. On the Supplier Portal, alerts appear under the title Notifications.

You can use alerts to notify suppliers when you need updated information, such as documents. You can also alert suppliers about upcoming events, such a changes to policies or scheduled maintenance.

Types of Supplier Alerts

The following table describes the types of alerts:

Message Type	Description
Maintenance Update	Advise the supplier of upcoming maintenance activities.
Request for Information	Ask the supplier for additional information. For example, you might want to request up-to-date compliance documents.

Message Type	Description
Supplier Profile Updates	Advise the supplier of changes that a business manager made to the supplier profile.
Supplier Status	Alert the supplier to a change in the supplier status. For example, if you deactivate a supplier, you might want to notify the supplier.

Creating a Supplier Alert

To create a supplier alert, open the supplier profile and edit the Supplier Alerts area.

1. Find and open the supplier profile.

2. Expand the **Supplier Alerts** area.

3. Define the alert by setting the following options:

Option	Description
Message Type	Select the type of alert.
Message	Type the text that you want to display to the supplier.
External Link	To include a link with the message text, specify a URL.
Effective Start Date	Set this date if you want to begin displaying the alert at a future date. If this option is undefined, the alert appears on the Supplier Portal after the edit is saved or, if you send the edit for approval, after the edit is approved.
Effective End Date	Set this date if you want to remove the alert at a future date. If this option is undefined, the alert remains on the Supplier Portal until you set this date.

4. Click **Apply**.

CHAPTER 9

Creating Supplier Profiles on the Supplier Portal

This chapter includes the following topics:

Supplier Portal Overview

Suppliers use the Supplier Portal to initiate a relationship with your organization and fill out an online application form. After business users in your organization approve a supplier, the supplier can use the Supplier Portal to upload product catalogs, upload documents, update information, and monitor performance.

Note: As a business user, you do not use the Supplier Portal, but it is helpful to understand the Supplier Portal experience from a supplier perspective.

The Supplier Perspective

You are a representative for a snack food company, called Best Snack Foods. You want Best Snack Foods to become a supplier to a national retailer, called Supermarket Inc. Supermarket Inc has implemented the Supplier 360 application and set up their Supplier Portal.

The following steps outline a high-level view of the supplier experience, from initial contact to approved supplier.

1. You, as a representative for Best Snack Foods, register on the Supermarket Supplier Portal.

2. You receive an email with user credentials and an invitation to fill out an online application form on behalf of Best Snack Foods.

3. You sign into the Supermarket Supplier Portal.

4. You fill out the online application form. You notice that the information that you provided when you registered is already in the application. The application requests additional information about Best Snack Foods, including things like bank information and insurance information. You save the application and return to it later. After you finish the application, you click **Submit**.

5. You wait two weeks for the results of the review by Supermarket supplier relationship managers. During this time, you sign into the Supermarket Supplier Portal and monitor the progress of the review. It is a four-step approval process requiring participation by multiple managers. The result of the review is positive.

6. You receive an email that confirms that Best Snack Foods is an approved supplier for Supermarket Inc.

7. You sign into the Supplier Portal and see a Welcome dashboard. You can monitor things like delivery performance and invoice amounts.

8. You upload a product catalog.

9. You add contact names for the people at Best Snack Foods who are authorized to interact with Supermarket Inc. If a contact has edit privileges for the supplier profile, you select Admin User. Otherwise, you select Portal User.

10. The contacts receive an email with user credentials and a link to the Supermarket Supplier Portal.

Supplier Portal Registration

When a supplier representative registers on the Supplier Portal, the Portal checks to see if a supplier profile exists for the supplier name. If a profile exists, the Portal prompts the supplier representative to sign in. If not, the registration continues and the representative enters some general information about the supplier organization. After the registration is complete, the representative receives an email confirming the registration and inviting the representative to complete the online application.

The following image shows the details that a supplier has to fill in while registering on the Supplier Portal:
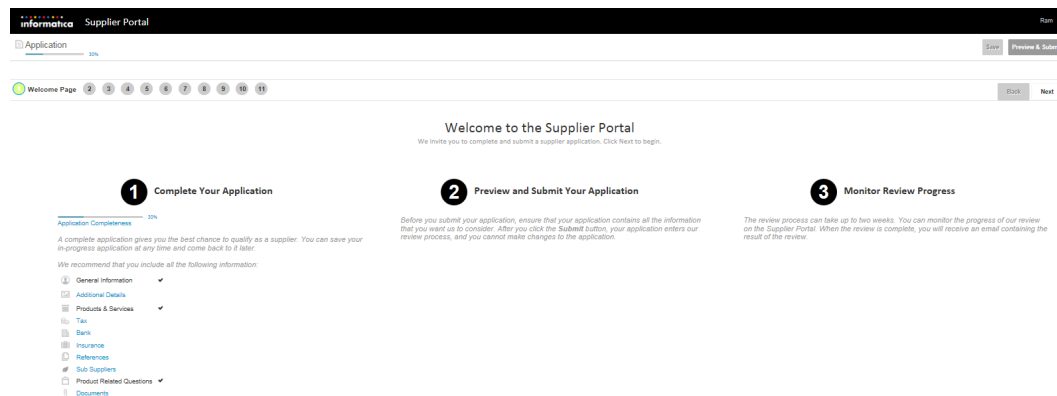
Supplier Portal Online Application

The online application form contains multiple pages. Each page focuses on a different type of information, such as tax information or banking information.

After a supplier representative submits an application form, the submission automatically triggers the qualification business process. The Portal communicates with the MDM Hub, which saves the data that is entered in each page to separate records in a pending state. The MDM Hub links the records to construct and present a 360 degree view of a supplier to business users.

If the supplier is approved, the data in the supplier application form becomes the supplier profile. Supplier data does not need to be entered again.

Adding Product-Related Questions

The online application form on the Supplier Portal includes a page for product-related questions. You can add questions to this page from Supplier 360.

After you add a question, you map the question to one or more products or services.

1. In Supplier 360, click **New**, select **Product Related Questions**, and then click **OK**.

   The **Product Related Questio**n page opens.

2. Type the question.

3. To make the question visible to suppliers, set the Active Indicator to **Yes**.

   Note: You can hide the question without deleting it by setting this indicator to **No**.

4. Select one of the following answer types.

Answer Type	Description
Text	Allows users to enter any text as the answer.
Multi-Value	Allows you to define multiple options, and the user can select an option as the answer. For example, for a confirmatory question, you can have **Yes** and **No** as the options. If you select **Multi-value** as the answer type, ensure that you configure the values in the **Product Questions Answer** section.
Date	Allows you to select a date as the answer.

5. To map the question to the products and services, perform the following steps:

   a. Click **Product Services Question Relationship**, and then click **Create Child Record**.

   b. Select the product or service code that you want to map to the question.

   c. To make the question mandatory, select **Yes**.

6. To map a supplier to a product ID, perform the following steps:

   a. Click **Party Product Related Answer**, and then click **Create Child Record**.

   b. Enter the party ID, and select the product ID.

      Note: Do not fill in the Answer field.

7. If you select the answer type as multi-value, perform the following steps:

   a. Expand **Product Questions Answer**, and then click **Create Child Record**.

   b. Enter a code for the answer and then the answer description.

For example, if you have a confirmatory question, configure the following options as answer:

Answer Code	Answer Description
Y	Yes
N	No

    c.   If you want to add more answers, repeat steps b through c.

8.   Click **Save**.

Supplier Profile

After a supplier is approved, the supplier application is converted to a supplier profile. The supplier profile contains all the information from the application.

Supplier representatives use the Supplier Portal to view their supplier profile. When a supplier representative signs on to the Supplier Portal, the representative sees the Welcome dashboard. In the left navigation panel under Company, the links summarize the information that makes up the supplier profile. In the display area, the representative can see messages, links to catalogs, notifications, renewal alerts, invoices, and some performance metrics. Authorized supplier representatives can modify information, add supporting documentation, upload catalogs, and monitor performance.

Business users use Supplier 360 to open and view supplier profiles. A data steward can edit data in the supplier profile, send notifications to the supplier, and change the status of a supplier. A data steward can also create supplier profiles.

If the Supplier Portal connects to a Product Management Information (PIM) system, the product catalog upload and product catalog management operations are available to the suppliers. The supplier must have the necessary permissions to upload and edit product catalogs.

The following image shows the Supplier Portal user interface when the environment has a PIM system:
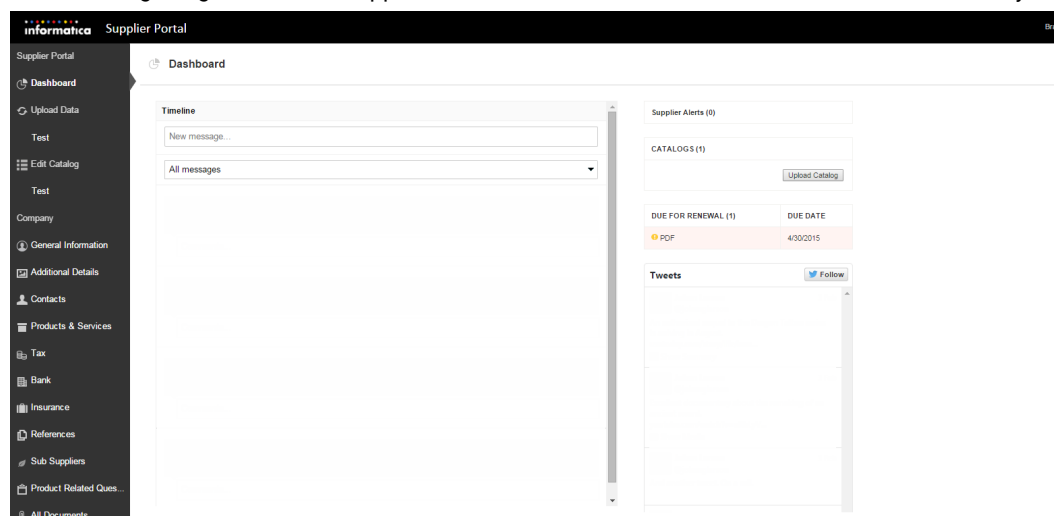
The following image shows the Supplier Portal user interface when the environment does not have a PIM system:

Product 360 Integration

You can integrate Supplier 360 with Product 360 to manage products details.

If you integrate Product 360 with Supplier 360, suppliers can upload their product catalogs from the Supplier Portal of Supplier 360. In Supplier 360, if you configure to support the Product 360 broker users, the broker users can access the Supplier Portal of Product 360 when they log in to Supplier Portal of Supplier 360. The broker users can access all the Product 360 services available for the role. The **Task View** page of the Supplier Portal displays all the Product 360 tasks, and the users can act on their assigned tasks.

Supplier Profile Edit Privileges

By default, the supplier representative who submitted the online application has the Admin User role. This representative can edit supplier data on the Supplier Portal. If you want the supplier representative to contact you to change certain information, such as banking information, you can ask your Application administrator to make the page non-editable.

The supplier representative with the Admin User role can add additional contacts. When creating contacts, the representative decides if the contacts can edit the editable pages.

The following table summarizes the role privileges:

Supplier Portal Role	View Pages	Edit Editable Pages
Admin User	Yes	Yes
Portal User	Yes	No

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   supplier 360 dashboard