

Create Negotiations

Audience: Buyer

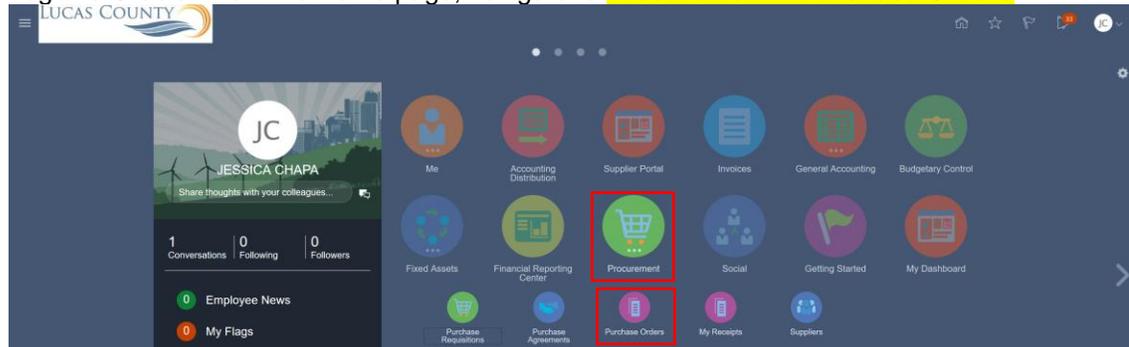
Purpose: Your negotiation document specifies the details of the negotiation for potential suppliers. While being developed, your document can be stored as a draft until you are ready to publish it.

There are several ways you can create the negotiation document. There are also tools to help simplify the creation process.

- You can use a negotiation style to control the look of the document and the features available. A style is a good way to create a streamlined negotiation.
- You can use a negotiation template to create a base negotiation document containing much of the line and supplier-related information. Once you have a template defined, you can reuse it without having to reenter negotiation information. You must have access to the Procurement Business Unit for this the template was defined to access it.
- You can use requisitions in Purchasing to create a negotiation document. When you use this method, the requisition information is used to create the negotiation lines.

If you create your negotiation from scratch, as you create your negotiation, a series of train stops appear. These identify major sections of the negotiation document for which you may need to enter information, depending on the goal of the negotiation. The following descriptions describe the purpose for each negotiation section. Note that depending on which negotiation style you are using, one or more of the sections may not be available for use and so may not appear among the train stops.

This job aid will assist you in creating an invitation to bid by processing a requisition.

Step	Action
1	<p>Log into Oracle. From the Home page, navigate to Procurement > Purchase Orders.</p> 
2	From the Overview page, click the Task list icon.

Overview

Orders Requiring Attention

0
Rejected

0
Failed Submission

0
With Invoice Holds

Orders in Process

No data to display

- Pending App...
- Pending Ack...
- Pending Sig...
- Change Pen...
- Change Pen...
- Change Pen...

Select **Process Requisitions.**

Requisitions

- Process Requisitions
- Import Requisitions
- View Requisition Lines

Orders

3 In the **Search Criteria** the **Buyer** defaults to your name. Select a buyer and click the **Search** button. The requisitions from that buyer will display.

Process Requisitions Done

Search

** Requisitioning BU

** Requisition

** Buyer CHAPA, JESSICA

** Deliver-to Location

** Category Name

** Item

Search Reset Save...

4 Select a **Requisition line** from the search results.

Search Results: Requisition Lines

Actions View Format Detach Wrap Add to Document Builder Return Reassign

Requisition	Line	Line Description	Requester	Quantity	UOM	Price	Amount	Currency
95	1	County Membership Services	AMANDA THO...			50.00	50.00	USD

Rows Selected 1 Columns Hidden 49

5 Click the **Add To Document Builder** button.

Add to Document Builder
Return
Reassign

6 Click the **Type** drop down menu and select **New Negotiation**.

Add to Document Builder

Selected Requisition Lines

Requisition	Line	Line Description	Requester	Amount	Currency
95	1	County Member...	THOMASSON, ...	50.00	USD

Columns Hidden 47

Add All Selected

Type New Negotiation

Negotiation Type Invitation to Bid

Negotiation Style Invitation to Bid

Negotiation Template Invitation to Bid-Standard Purchase Order

Outcome Purchase Order

* Negotiation Currency USD

OK Cancel

7 Click the **Negotiation Style** field and select **Invitation to Bid**.

8 Click the **Negotiation Template** field and select **Invitation to Bid-Standard Purchase Order**.

9 Verify that **Outcome** defaults to Purchase Order and **Currency** defaults to USD.

10 Click **Ok**.

11 Click the **Create** button.

Procurement BU

Lucas County

Document Builder

Type

New Negotiation

Negotiation Type

Invitation to Bid

Negotiation Style

Invitation to Bid

Negotiation Template

Invitation to Bid-Standard Purchase Order

Outcome

Purchase Order

Negotiation Currency

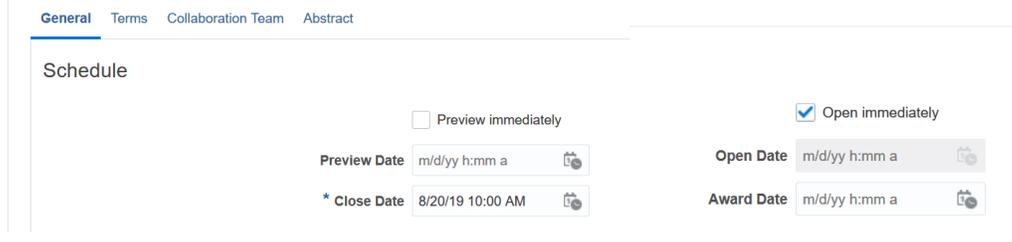
USD

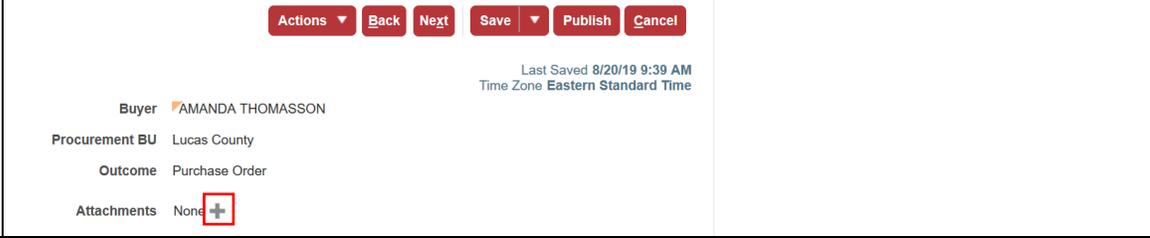
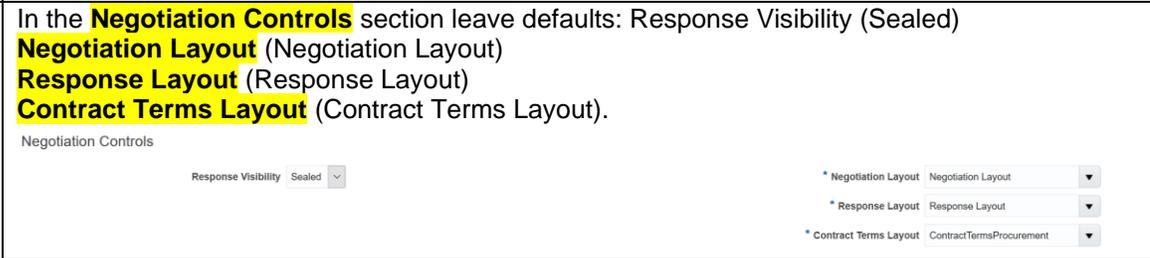
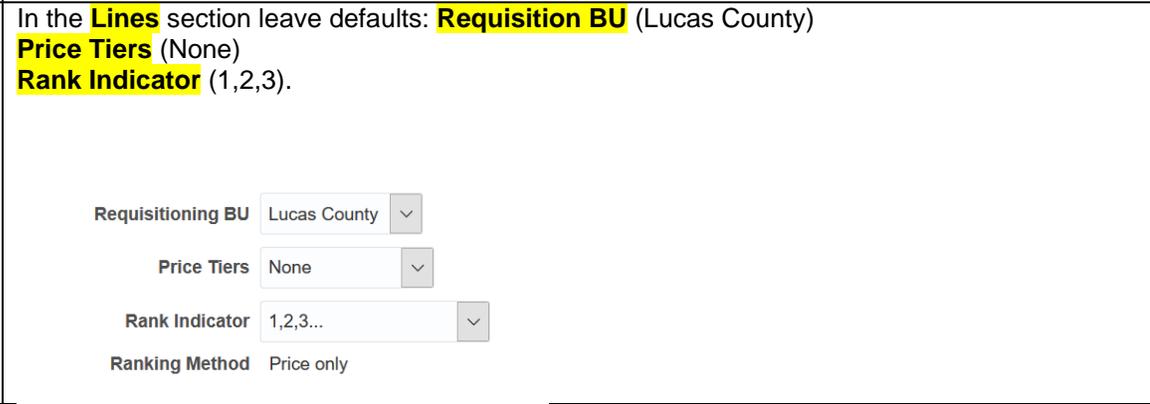
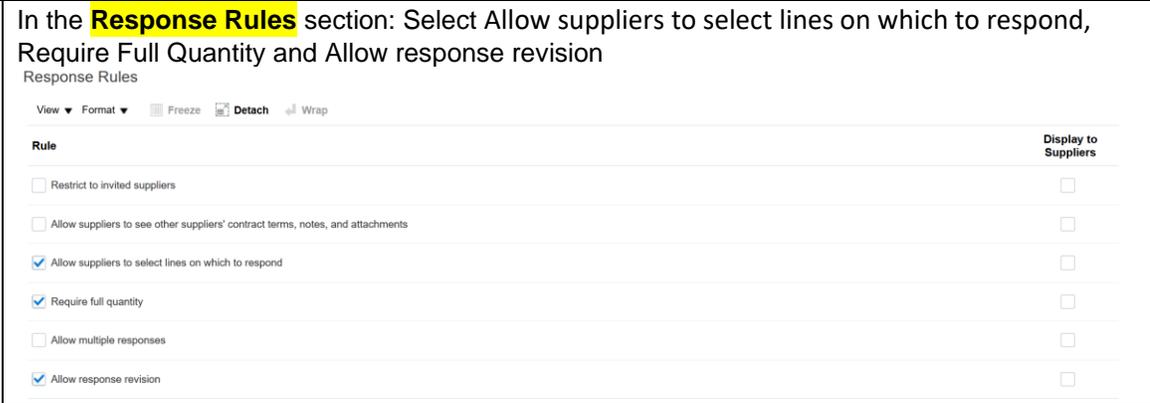
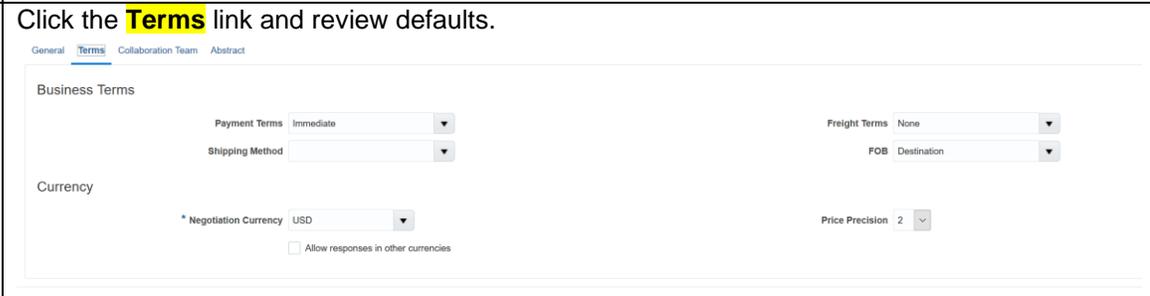
Your Document Builder contains 1 lines.

Recently Added Lines

County Membership Serv...	50.00	USD
Total	50.00	USD

Edit Create Clear

12	<p>Message displayed. Click Ok to acknowledge.</p> 
13	<p>The Edit Negotiation page displays. Click the Overview Task Train Stop.</p> 
14	<p>Enter a description in the Title field and enter a description in the Synopsis.</p> 
15	<p>Edit Negotiation (Invitation to Bid 5): Overview</p> 
16	<p>Select the Open Immediately or enter an Open date. Enter Close Date.</p> 
17	<p>Next to the Attachments field click the + to add/review attachments.</p>

	
18	Review any attachments and click Cancel .
19	<p>In the Negotiation Controls section leave defaults: Response Visibility (Sealed) Negotiation Layout (Negotiation Layout) Response Layout (Response Layout) Contract Terms Layout (Contract Terms Layout).</p> 
20	<p>In the Lines section leave defaults: Requisition BU (Lucas County) Price Tiers (None) Rank Indicator (1,2,3).</p> 
21	<p>In the Response Rules section: Select Allow suppliers to select lines on which to respond, Require Full Quantity and Allow response revision</p> <p>Response Rules</p> 
22	<p>Click the Terms link and review defaults.</p> 
23	Click Collaboration Team to add team members.

Overview Manage Negotiations x Edit Negotiation: Invitation to Bid 17 x

Currency = US Dollar

Title: Monthly Fleet Maintenance
Synopsis: Bid for maintaining vehicles
Negotiation Style: Invitation to Bid

Buyer: AMANDA THOMASSON
Procurement BU: Lucas County
Outcome: Purchase Order
Attachments: None

Last Saved: 8/21/19 11:00 AM
Time Zone: Eastern Standard Time

General Terms Collaboration Team Abstract

24 Click the **+** button to add team member.

Actions View Format **+** X Freeze Detach Wrap Send Notification

* Team Member	Job	Access	Price Visibility	Task
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25 Search and select team member.

Search and Select: Team Member

Search

Advanced

** At least one is required

** Name
** Department: Support Services
** Job
** Email
** Phone

Search Reset

Name	Department	Job	Email	Phone
THOMASSON, AMANDA	Support Services	Manager 1	athomasson@co.lucas.oh.us	419-213-4521
Rath, Michael	Support Services		michael.rath@sierra-cedar.com	111-1111
ASHFORD, RUTH	Support Services	Director 1	rashford@co.lucas.oh.us	419-213-4508
JAYNES, TERINA	Support Services	Telecommunications Coordinator	terrinjaynes@yahoo.com	213-2130
PRUDE, ALYSHA	Support Services	Purchasing Assistant	alysahayrd@gmail.com	213-3183
CHAPA, JESSICA	Support Services	Purchasing Assistant	jchapa@co.lucas.oh.us	419-213-4529
HALL, PATRICIA	Support Services	Purchasing Assistant	hall.pattie4300@yahoo.com	213-4520
Elliott, Robert	Support Services		robert.elliott@sierra-cedar.com	
Barima, Ranks	Support Services		ranks.barima@sierra-cedar.com	

OK Cancel

26 Select view only from the **Access** drop down list.

* Team Member	Job	Access	Price Visibility	Task	Target Date
JAYNES, TERINA	Telecommunications Coord...	View only	<input checked="" type="checkbox"/>	View Bid from Supplier	8/21/19

Example: 8/21/19
Enter a date on or after 8/21/19.

27 Enter a **Task**: 'View Bid from Supplier'.

28 Enter an applicable **Target Date** for when the task will be due.

29 Click the **+** button to add team member.

30 Search and select team member. Click **OK**.

31	<p>Select 'Full' from the Access drop down list.</p>
32	<p>Enter a Task: 'Provide input as needed'.</p>
33	<p>Enter an applicable Target Date for when the task will be due.</p>
34	<p>Click the + button to add team member.</p>
35	<p>Search and select team member.</p>
36	<p>Select 'Full' from the Access drop down list.</p>
37	<p>Enter a Task: 'Provide input as needed'.</p>
38	<p>Enter an applicable Target Date for when the task will be due.</p>
39	<p>Click the Send Notification button.</p>

40	<p>Click Save.</p>
41	<p>Click the Abstract link.</p>
42	<p>In the Abstract Controls section confirm that Automatically Post abstract is selected.</p>
43	<p>Click the Lines Task on the Train Stop and add additional information to the description.</p>
44	<p>Review the Requested Delivery Date.</p>
45	<p>Click Contract Terms Train Stop.</p>
46	<p>Click the Add Contract Terms button.</p>
47	<p>Click OK.</p>
48	<p>Click Run the Contract Expert.</p>

Overview Manage Negotiations x Invitation to Bid: 13 x Edit Negotiation: Invitation to Bid 17 x

Contract Terms

Contract Expert Last Run: 8/21/19 9:57 AM

49 Enter **Values** for the **Clauses**. Click the **Clauses Using Variable** icon to see location of variable.

Run Contract Expert

1 Enter Variable Values 2 Answer Questions 3 Review Suggested Clauses

Run Contract Expert: Enter Variable Values

Name	Description	Value	Clauses
Questions A...	Questions Addressed to Email	test@email.com	
Questions A...	Questions Addressed to Name	anda Thomasson	
Requesting ...	Requesting Department	Support Services	
Requesting ...	Requesting Department Address	Bldg. Toledo OH	
Term of Cont...	Term of Contract	30 Days	

Back Next Save and Close Finish Cancel

50 **Clauses Using Variable** Icon drilldown. Click **Done** to close the window.

Clauses



Section	Clause Title	Clause Description
General Condi...	Administrative Requ...	<p>Administrative Requirements: Text</p> <p>Questions regarding this ITB should be submitted via email to [@Questions Addressed to Name@] at [@Questions Addressed to Email@].</p> <p>Bidders should carefully review all elements of their bids. Once opened, bids may not be altered. Each response in regard to this ITB shall be completed, self-contained and meet the requirements of the ITB. The County may initiate clarifications after the bid opening. However, these clarifications will not constitute an alteration of the bid submitted.</p> <p>References to a particular trade name, manufacturer's catalog, or model number are made for descriptive purposes to guide the Bidder in</p> <p style="text-align: right;">Done</p>

51

Click the **Next** button.

	<p>Run Contract Expert</p> <p>1 — 2 — 3 Enter Variable Values Answer Questions Review Suggested Clauses</p> <p>Run Contract Expert: Enter Variable Values</p> <p>View ▼ Format ▼ Freeze Wrap View All variables ▼</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Description</th> <th>Value</th> <th>Clauses</th> </tr> </thead> <tbody> <tr> <td>Questions A...</td> <td>Questions Addressed to Email</td> <td>test@email.com</td> <td></td> </tr> <tr> <td>Questions A...</td> <td>Questions Addressed to Name</td> <td>inda Thomasson</td> <td></td> </tr> <tr> <td>Requesting ...</td> <td>Requesting Department</td> <td>Support Services</td> <td></td> </tr> <tr> <td>Requesting ...</td> <td>Requesting Department Address</td> <td>Bldg. Toledo OH</td> <td></td> </tr> <tr> <td>Term of Cont...</td> <td>Term of Contract</td> <td>30 Days</td> <td></td> </tr> </tbody> </table> <p>Back Next Save and Close Finish Cancel</p>	Name	Description	Value	Clauses	Questions A...	Questions Addressed to Email	test@email.com		Questions A...	Questions Addressed to Name	inda Thomasson		Requesting ...	Requesting Department	Support Services		Requesting ...	Requesting Department Address	Bldg. Toledo OH		Term of Cont...	Term of Contract	30 Days	
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Requesting ...	Requesting Department Address	Bldg. Toledo OH																							
Term of Cont...	Term of Contract	30 Days																							
52	<p>Select a value for the Answer Questions section. Click the Next button.</p> <p>Run Contract Expert</p> <p>✓ — 2 — 3 Enter Variable Values Answer Questions Review Suggested Clauses</p> <p>Run Contract Expert: Answer Questions</p> <div style="border: 2px solid red; padding: 5px;"> <p>Is a Bid Bond required? No ▼</p> <p>Is a Pre-Bid Conference Required? No ▼</p> </div> <p>Back Next Save and Close Finish Cancel</p>																								
53	<p>Review Suggested Clauses. If there are no additional clauses to add, click Finish.</p>																								

54	<p>Message Displayed. Click OK.</p>
55	<p>Click Save.</p>
56	<p>Review Contract Terms. Click the Refresh icon to review variables added to the clauses by the Contract Expert.</p>
57	<p>Click the Suppliers Train Stop.</p>
58	<p>Click the Search and Add button.</p>
59	<p>Enter the Supplier Name and click the Search button.</p>

60 Select **Suppliers** from the list (you may select multiple by holding down the CTRL key as you select).

Suppliers: Add Suppliers (Invitation to Bid 5)

Search

Procurement BU: Lucas County

** Supplier Keywords: AT Corporation

Business Relationship: [Dropdown]

** Business Classification: [Dropdown]

** Category Name: [Text]

Transactions: [Dropdown]

Transactions Since: 8/20/18

Item Validation Organization: [Dropdown]

** Item: [Text]

** Line Description: [Text]

Buttons: Search, Reset, Save..., Add Fields, Reorder

Search Results

Buttons: Actions, View, Format, Freeze, Detach, Wrap, Add to Selection

Supplier	Purchasing Documents		ASL Status Summary	Sourcing Only	Negotiations		
	Agreements	Orders			Invited	Responded	Awarded
A&O Acquisition Corporation	0	2			0	0	0
ACCO Brands Corporation	0	0			0	0	0
Alere San Diego	0	0			0	0	0
Allied Intotech Corporation	0	0			0	0	0
Airo Steel Corporation	0	0			0	0	0
AMERICAN LEGAL PUBLISHING CORPORATION	0	0			0	0	0
American Tower Corporation	0	0			0	0	0
AMMT Corporation	0	0			3	1	1
Anchortex Corporation	0	0			0	0	0
Anne Grady Corporation	0	0			0	0	0
Asset Protection Corporation	0	0			0	0	0
AT Corporation	0	0			0	1	0
Bank Corporation	0	0			0	0	0

61 Click the **Add to Selection** button.

Supplier Selection

You have selected 2 suppliers.

Buttons: Actions, View, X

Supplier: AT Corporation, RDA Corporation

Continue

62 Click **Continue** button.

63 Select a **Supplier Site**, **Contact** and **Email Address** if available.

64 Click the **Review** Train Stop.

65 Click **Save**.

66 Click **Publish**.

67 Message displayed. Click **OK**.

Confirmation

Negotiation 5 was published.

OK

68 Click **Done**.

