



Configuration Guide SAP Sourcing 7.0

Target Audience

- System administrators
- Consultants

PUBLIC

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Document History

The following table provides an overview of the most important document changes.

Version	Date	Description
1.0	2011-02-28	Initial version
1.1	2011-11-11	Enhanced Global Search information
1.2	2012-02-02	Managing the SSL Certificate
1.3	2012-03-09	Corrected workbook names.
1.4	2012-05-17	Added security system property.
1.5	2012-08-20	Added instructions to set up SMTP Server
1.6	2013-01-29	Added Supplier Workflow Management

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1 Basic Settings for SAP Sourcing and CLM

This guide describes the deployment of SAP Sourcing 7.0 on SAP NetWeaver Composition Environment 7.1 including enhancement package 1.

1.1 Define System Properties

J2EE System Properties

The following are the default values:



NOTE

These J2EE system properties can also be defined automatically using a dbimport script. For more information, see *Define J2EE System Properties* in the installation guide for SAP Sourcing on SAP Service Marketplace at <http://service.sap.com/eso> ► SAP Sourcing ◀.

Initial JNDI Context

system,

```
j2ee.jndi.java.naming.factory.initial=com.sap.engine.services.jndi.InitialContextFactoryImpl
```

JNDI Naming Factory

system, j2ee.jndi.java.naming.factory.url.pkgs=com.sap.tm.jndi.providers

JNDI Provider

system, j2ee.jndi.java.naming.provider.url=localhost:50004



NOTE

If you are deploying the Symantec Scan Engine to scan uploaded attachments for viruses, SAP Sourcing requires use of the native protocol, and certain properties should be set up. Log in as the System user and modify the properties listed in the table below as specified:

Property	Instructions
system, system.avscanner.hostname	Set to the host where the Symantec Scan Engine is installed.
system, system.avscanner.port	Set to the port where you have the service listening (default is 7777).

1.1 Define System Properties

Property	Instructions
<code>system, system.avscanner.policy</code>	Can be set to either SCAN_ONLY or SCAN_REPAIR .
<code>system, system.avscanner.enabled</code>	Should be set to True .

**NOTE**

For multiple landscape use, all the configurations must have the same name. If not, migration will be affected.

Security System Properties

`system, system.security.csrf.trusted_referrer_domains`

You can specify patterns to identify authorized URLs from which users may submit requests.

A request is trusted under the following circumstances:


- If the referrer (the URL from which the request originates) is absent, it is trusted.
- If the referrer's domain name is exactly the same as the application's domain, it is trusted.
- If the referrer's domain name matches any of the patterns in the `system, system.security.csrf.trusted_referrer_domains` system property, it is trusted.

To protect the enterprise itself, set this property as the enterprise user. To provide protection for system-level tasks, you must also set this property as the system user.


**EXAMPLE**

If you set this property only as the enterprise user, any URL can refer requests for system user functionality, but requests for supplier functionality must come from URLs that match one or more patterns in this system property. If you set this property as the system user also, then even requests for system user functionality must come from a trusted URL.

Set the value of the system property `system, system.security.csrf.trusted_referrer_domains` by adding one or more of the following patterns, separated by semi-colons:

Pattern	Description
<code>*</code>	Any referrer is trusted.
<code>*.name.com</code>	Trusted referrer domains must end with the specified string. <div data-bbox="292 1693 338 1738" data-label="Image">  </div> <div data-bbox="349 1691 480 1720" data-label="Section-Header">EXAMPLE</div> <div data-bbox="349 1733 533 1762" data-label="Text"> <p><code>*.mydomain.com</code></p> </div> <div data-bbox="349 1767 1340 1832" data-label="Text"> <p>Requests from <code>www.mydomain.com</code> and <code>mobile.mydomain.com</code> and <code>cloud.mydomain.com</code>, etc, would all be trusted.</p> </div> <div data-bbox="349 1834 962 1868" data-label="Text"> <p>Requests from <code>www.mydomain.org</code> would not be trusted.</p> </div>
<code>name.com</code>	Trusted referrer domains must match the specified string exactly.

1.1 Define System Properties

Pattern	Description
	EXAMPLE <code>www.mydomain.com</code> Only requests from <code>www.mydomain.com</code> would be trusted.

If you add more than one pattern to the property, requests that match any of the included patterns will be trusted.

**EXAMPLE**

`www.yourdomain.com; *.mydomain.com`

Requests from any domain ending in `.mydomain.com` would be trusted, along with requests from the `www.yourdomain.com` domain.

**NOTE**

By default this system property is empty, so the only trusted domain is the application's own domain.

Other Security System Properties

This table lists the other security system properties in SAP Sourcing.

Property	Description
<code>system, system.cookies.enable_http_only</code>	When True , the browser denies Javascript access to cookies.
<code>system, system.cookies.enable_secured</code>	When True , cookies can only be passed using the secure https protocol.
<code>system, system.security.directory.display_entry_does_not_exist_error</code>	When True , error messages for failed login attempts distinguish between invalid credentials (password) and nonexistent directory entry (username). When False , both failures result in the same error message.
<code>system, system.security.domain.validate_redirect_url</code>	When True , this property forces the system to work only under a single domain. This can adversely affect performance.
<code>system, system.security.separate_pswd_and_name</code>	When True , creation or modification of a user account results in two separate email notifications: one with a username, one with a password.
<code>system, system.allow.embed.in.iframe</code>	When True , SAP Sourcing can be embedded in an iframe.

1.2 Set Up SMTP Server

Procedure

1. Navigate to Configuration ► *Setup* → *Configuration* → *System Properties*. ◀
2. Edit the system property in the messaging set for the SMTP mailhost `messaging.smtp.mailhost` as follows:

Property	Value
Set	Messaging
Name	<code>messaging.smtp.mailhost</code>
Context	<new context>
Notes	<p>Hostname of the SMTP server. This assumes port 25 and anonymous connection. If using a different port or if a username and password are required, three additional properties can be set:</p> <ul style="list-style-type: none"> ■ <code>messaging.smtp.port</code> ■ <code>messaging.smtp.username</code> ■ <code>messaging.smtp.password</code>

3. *Save*.

1.3 Context, Cluster, and Directory Configuration

To establish a working environment, you must configure the following components:

- Context
- Cluster
- Directory configurations (internal and external)

All of these configurations are accessed using the System login. These can be individually created and manually associated, or they can be configured using the *Tenant Configuration* utility. When using the utility, the individual cluster and directory components are created as templates. The *Tenant Configuration* utility will then create the context and associate the context, cluster, and directories automatically.

For the purposes of clarity, the association between the three components is as follows:

- Context: None
- Cluster: Context
- Directory configuration: Context **and** cluster

If SSL Termination is occurring in the load balancer prior to arrival at SAP Sourcing, add the HTTP header *X-Original-HTTPS* to the request with a value of *on*. Sticky sessions must also be enabled by cookie or another method.

For more information about Cluster Configuration, see the SAP Sourcing help, at ► help.sap.com → *Setup* → *System Setup* → *Configuration* → *Cluster Configuration* ◀.

1.3.1 Create Cluster Template

Cluster Templates can be created to make the tenant configuration process faster, but it is not necessary to create them. The cluster information can also be entered manually in the *Create Tenant Configuration* [page 11].

Procedure

1. Login as the System Manager and choose Cluster Templates
2. Choose *New*
3. Create a new cluster template with the following (example) parameters:
 - **External ID:** cluster.example
 - **Display Name:** Cluster Example
 - **Host Name:** example.sap.com

1.3.2 Create Internal Directory Template

Directory Templates can be created to make the tenant configuration process faster, but it is not necessary to create them. The directory information can also be entered manually in *Create Tenant Configuration* [page 11]

Procedure

1. Login as the System Manager and choose *Directory Templates*.
2. Choose *New*
3. Create a new directory template with the following (example) parameters:
 - **External ID:** directory.internal.example
 - **Display Name:** Internal Directory Example
 - **Usage:** Active Internal
 - **Authentication Support:** true
 - **Case Sensitive Username:** false
 - **Driver:** NetWeaver UME
 - **Properties**
 - **Property Name:** bypass_error_block
 - **Property Value:** true
 - **Attributes Mapping**
 - **Local ID:** NAME
 - **Mapped ID:** uniquename
 - **Edit Mode:** Pull

1.3.3 Create External Directory Template

Directory Templates can be created to make the tenant configuration process faster, but it is not necessary to create them. The directory information can also be entered manually in *Create Tenant Configuration* [\[page 11\]](#).

Procedure

1. Login as the System Manager and choose *Directory Templates*.
2. Choose *New*.
3. Create a new directory template with the following (example) parameters:
 - **External ID:** directory.external.example
 - **Display Name:** External Directory Example
 - **Usage:** Active External
 - **Authentication Support:** true
 - **Case Sensitive Username:** false
 - **Driver:** NetWeaver UME
 - **Properties**
 - **Property Name:** bypass_error_block
 - **Property Value:** true
 - **Attributes Mapping**
 - **Local ID:** NAME
 - **Mapped ID:** uniquename
 - **Edit Mode:** Pull

1.3.4 Managing the SSL Certificate

In order to write to an Active Directory, Microsoft requires that communication to the LDAP is conducted over SSL.

Getting SSL Working

In order to enable SSL communication, you need to do the following:

- Change the communication port in the Directory Configuration from 389 (the default setting) to 636.
- Select the SSL checkbox in the Directory Configuration.
- Verify that the Certificate Authority (CA) that issued the server certificate is in the Java Keystore.
- When an intermediate CA is used to generate server certificates, the intermediate CA certificate will need to be imported manually.

If any 'Issuer' CA certificates required to complete the server certificate chain are missing from the Java security repository on the application server, install them manually into that repository.

Use the following command to install the certificate:

```
<JAVA_HOME>\bin\keytool -import -trustcacerts -keystore cacerts -file
```

```
<Location_of_exported_Certificate xxx.crt> -alias <some_alias>
```

<JAVA_HOME> is the location of the SAPJVM. For example /sapmnt/<SID>/exe/jvm/linuxx86_64/sapjvm_5.1.064/sapjvm_5.

For this <JAVA_HOME>, the cacerts file would be located at /sapmnt/<SID>/exe/jvm/linuxx86_64/sapjvm_5.1.064/sapjvm_5/jre/lib/security/.

After performing these tasks, restart NetWeaver and test by creating a new user in SAP Sourcing.

1.3.5 Create Tenant Configuration

The creation of a tenant configuration will also create:

- a context
- a cluster
- an internal directory
- an external directory

The information necessary can be retrieved from cluster and directory templates or entered manually.

Procedure

1. Login as the System Manager and choose Tenant Configuration # #
2. Choose New
3. Create a new tenant configuration with the following (example) parameters:

Using Templates

- External ID: tenant.example
- Display Name: Tenant Example
- Sys Admin Password:
- Sys Admin Password (again):
- Cluster: Cluster Example
- Directory Internal Site: Internal Directory Example
- Directory External Site: External Directory Example

No Templates

- External ID: tenant.example
- Display Name: Tenant Example
- Sys Admin Password:
- Sys Admin Password (again):
- Overwrite Templates Configurations:
 - Cluster (checked)
 - Directory Internal Site (checked)

1.4 Master Data

- Directory External Site (checked)
- *Cluster Configuration* [page 9] step
- *Internal Directory Configuration* [page 9] step
- *External Directory Configuration* [page 10] step

1.4 Master Data

Gathering Critical Information

For each deployment, gather critical information, including (but not limited to) the following:

- Buy-side organizational data: Locations, Companies, Business Units, Groups, and Users
- Sell-side organizational data: Suppliers and Contacts
- Commodity Information: Internal and External Categories

The current implementation methodology recommends defining these attributes before going live to maximize efficiency. Data attributes may be modified or added throughout the life of the implementation using the *Setup* module.

1.4.1 Overview of Master Data

SAP Sourcing provides the following means to install master data:

- Manual entry from *Setup*
- Import from CSV file
- Import from deployment workbook

Define the components of master data that exist within each context after contexts and clusters have been defined. The following table lists the master data object types requiring definition for the enterprise. The data classification *Configurable* indicates that default data is provided but can be customized for deployment. The data classification *Custom* indicates that no default data is provided and the deployment must provide the data.

Contents	Data Classification	Description
Numbering table definitions for enterprise-level objects	Configurable	Defines the format of IDs. For example, an RFP might follow the format: RFP-nnnn, where nnnn increments for each new rfp created.
Default list of extendible enterprise-level objects	Configurable	Lists those enterprise-level objects which can be extended
Default list of objects that can be used referenced in an extension	Configurable	One type of extension allows a reference to another type of object. This list identifies the allowed kinds of references.
Value List Types	Configurable	Default value list types
Value List Values	Configurable	Default value list values, such as countries, time zones, and so on

1.4 Master Data

Contents	Data Classification	Description
Units of Measure	Configurable	Standard units of measure used throughout the system
Currencies	Configurable	A list of all currencies used by your organization
Currency Conversions	Configurable	Default values for any currency conversion rates
Document Link Definitions	Configurable	Lists the allowable kinds of document links
Scheduled Task Types	Configurable	Used to define categories of scheduled tasks
Scheduled Tasks	Configurable	Lists scheduled or background tasks
Metrics	Configurable	Used to define metrics for scorecards
Contract Terms	Configurable	Used to define terms on contracts
Contract Types	Configurable	Types define what set of contract features are available
Project Types	Configurable	Types define what set of Project features are available
RFX Types	Configurable	Types define what set of RFX features are available
Auction Types	Configurable	Types define what set of Auction features are available
DA Types	Configurable	Types define what set of Demand features are available
Security Profiles	Configurable	Identifies the security profiles installed with the system
Rights on security profiles	Configurable	Defines the rights for each security profile
Time Periods	Configurable	Defines information about quarters, years, and so on
Reporting Calendars	Configurable	Used for managing how data is reported with relation to the calendar
Collaborator Roles	Configurable	Defines the role (rights and responsibilities) of a person/group on a specific document instance
Document Security Templates	Configurable	Sets up the default collaborators and security when new documents are created
Shared Discussions	Configurable	A list of discussion forums available as a channel and not relating to a specific document
Workbench Channels	Configurable	Channels available on a user's desktop
Workbench IFrames	Configurable	Data to create iFrames
Workbench Channel Configurations	Configurable	Channel configuration parameters
Workbench Pages	Configurable	Pre-defined desktop pages
Workbench Page Configurations	Configurable	Channel content and placement settings for predefined pages
Configuration Properties	Configurable	Various deployment settings, including mail

1.4 Master Data

Contents	Data Classification	Description
Enterprise Extensions	Custom	Actual extensions on enterprise-level objects
Directory Configurations	Custom	Used for the LDAP directory configuration
Geographies	Custom	Used to represent the Geographic regions
Locations	Custom	Locations of plants, companies, and other organizational elements
Payment Terms	Custom	Terms of payment between the buyer and vendor
External Categories	Custom	Typically this data set consists of industry standard category codes, such as UN-SPSC or SIC codes, if used by your organization.
Internal Categories	Custom	All internal purchasing categories used by the buyer
Vendors	Custom	Used in all components for various purchasing actions
Vendor Extensions in List Form	Custom	Actual extensions on enterprise-level objects
Companies	Custom	Used by all components of the system for purchasing actions such as Auctions and RFPs
Registration Categories	Custom	Defines mapping from arbitrary category names to actual internal or external categories. Used during vendor self-registration.
Organizational Units	Custom	Further definition of the organizational hierarchy. Use to define departments, business units, and so on.
Groups	Custom	Arbitrary groups of buy-side users
Contacts	Custom	Used for all vendors to distinguish the various contacts at each vendor
Accounts	Custom	Handles all user accounts for the system
Terms Templates	Custom	Standard terms and conditions phrases to which a vendor must agree before accessing an event

After configuring the enterprise master data, you must next configure the company master data. This data must be created once for each sub-context. This example only uses a single context, so this data must only be created once.

Contents	Data Classification	Description
UFNs	System	Metadata for RFx utility functions
System Answered Sources	Configurable	Defines the available sources of system answered questions
Company Extension Definitions	Configurable	List of company-scoped objects which have extensions
Document Security Templates	Configurable	Sets up the default collaborators and security when new documents are created

1.4 Master Data

Contents	Data Classification	Description
Contract Generation Phases	Configurable	Used to define Phases for Contract Generation library documents
Contract Generation Tags	Configurable	Used to define Tags for Contract Generation
Company extensions	Custom	List of extensions on individual object types
masterdata.Activity	Custom	Used for general accounting purposes
Cost Centers	Custom	Used for accounting purposes to assign cost on a center by center basis
Cost Center Groups	Custom	
Entities	Custom	Used for accounting purposes for purchasing by division
GL Accounts	Custom	Used for general accounting purposes
Plants	Custom	Plants or facilities
Materials	Custom	Standard materials for use in line items
Category Managers	Custom	Users who are responsible for certain categories

Master Data Security

When configuring and importing Master Data there are some things to remember about security:

- Each piece of importable master data has an *Import* right as part of its ACL list. By default, this right is only added for the *System Administrator* security profile, and therefore, only those users can import master data *out of the box*. As always, an admin can add *Import* rights to other security profiles, on and object-by-object basis.

**EXAMPLE**

If *Supplier Administrators* need to import Supplier records, then that can be enabled.

- When importing Master Data, be it via CSV, XLS, XML, etc., the user running the imports must have *Import* right allowed for all objects in question. The *Enterprise* user is considered *trusted* and can import any of these objects.

1.4.2 Create Master Data Manually**Procedure**

- Log in as the enterprise administrator for enterprise master data.
- Create objects from within the *Setup* module. You must log in as a sourcing administrator (a real user) in order to configure company master data.
- Log in as a sourcing administrator (a real user) to configure company master data.

For more information, see SAP Library for SAP Sourcing on SAP Help Portal at <http://help.sap.com> ► *SAP Business Suite* → *SAP Sourcing* → *Setup* → *System Setup* → *Master Data* ◀.

1.4.3 Import Master Data Using CSV File

You can import master data files with CSV or XLS format in two ways:

- Use the standard web user interface
- Use a client application distributed with the system, which allows data to be imported outside of the web environment

The following procedure describes how to import using the web-based UI.

Procedure

1. Open a web browser and access your buy-side logon page.
2. If application users have already been created, log into the enterprise as a user with administrative rights. If users have not been created, use the enterprise administrator built-in account.
3. Choose ► *Setup* → *System Administration* → *Import Export Tools* → *Import Data* ◄ and then choose *OK*.
4. Choose *Create*.
The import wizard opens.
5. Specify whether you want to upload the file to the server or whether the file is already located on the application server and choose *Next*.
6. Choose *Upload Import File* and select the CSV or Deployment Workgroup file to import.
7. For CSV files, select the object type and choose *Next*.
8. Indicate whether you want to wait for the import to finish or perform the import in the background and then choose *Next*.
9. Choose *Finish* to view the results.

1.4.4 Workbooks

1.4.4.1 Overview of Workbooks



NOTE

There are many sheets in the workbooks that have the prefix *es0*. While these sheets may appear as duplicates of other sheets, the data in them is in fact different. These sheets should be imported by default. You may also add data to these sheets if you would like to augment the data provided in the sample workbooks.

We recommend using the deployment workbook for initial deployment of the system to ensure that all required data is imported into the system

To facilitate the import of data, SAP Sourcing provides an alternative to CSV files for import. SAP Sourcing provides the ability to import Microsoft Excel files containing one or more master data imports. The system processes these Excel files directly without the user having to export the data to a raw CSV file. The Enterprise Deployment Workbook and Company Deployment Workbook are two sample deployment workbooks delivered with SAP Sourcing.

Anyone with system administrator access rights can download the deployment workbooks from the web user interface. The deployment workbooks are included in the online Reference Guide (RG).

When starting a new deployment project, preserve the original workbook templates by making a copy of them and saving them with a new name. Import data using your modified templates only. By doing so, you assure continuity if future, additional deployments are required.

**NOTE**

Keep the following in mind when using deployment workbooks:

- The Configuration Sheet controls the import process. Refer to the Help Sheet for input specifications of Configuration Sheet columns.
- The system can import the workbooks directly, but there are limitations to what Excel constructs are supported. The Help Sheet describes the rules that must be observed.
- The same importing process supports both CSV files and Excel workbooks.
- There is a one to one relationship with the workbook configuration file and the worksheet tabs.

1.4.4.2 Download and Customize Workbooks

The sample enterprise and company workbooks that you download from SAP Sourcing are designed for you to configure a base system using a sample enterprise context. We recommend modifying the default deployment workbooks. Choose the appropriate workbooks from this table:

System	Workbooks
SAP Sourcing	<ul style="list-style-type: none"> ■ Enterprise Deployment Workbook ■ Company Deployment Workbook

Users setting up a base system should adjust the various settings in these workbooks prior to running them in the system. For example, the company data should be updated to reflect specifics about the company that is installing the system. Similarly, you should review other tabs to ensure that the configurations are consistent with the desired implementation. For details on customizable fields, see *Master Data* [page 12].

Procedure

1. In SAP Sourcing, log on as the enterprise user and download the sample enterprise and company workbooks from the SAP Sourcing reference guide (RG).

**NOTE**

The enterprise workbook should be run as the enterprise user. The company workbook should be run as a system administrator associated with the company object intended to be configured.

2. From the Enterprise Deployment workbook, open the file and find the sheet labeled *locations* and edit this sheet as necessary.

1.5 Create and Verify Buy-Side User

Only one location is required.

3. Find each sheet, review each sheet and the comments in the sheet, and update the data accordingly.
4. Provide at least one internal category.
5. Find the sheet labeled *companies* and edit it as necessary.
6. Repeat for *org_units*, *groups*, *accounts*, and so on.

You are establishing a hierarchy. To configure the hierarchy correctly, you must ensure that the child references the parent correctly. For example, the *PARENT* column in the *business_units* page should include a valid *EXTERNAL_ID* from the *companies* sheet.

**NOTE**

To build all custom data in the user interface, simply deactivate the import of the above data types in the deployment workbook. See the Help page for instructions on how to skip a specific worksheet.

7. Import the enterprise and company workbooks into SAP Sourcing by choosing ► *Setup* → *System Administration* → *Import and Export Tools* → *Import Data* ◀ and then choose *Create*.

1.4.4.3 Import Master Data Using Workbooks

Procedure

1. Open a browser and go to the login page <http://yourhost/fsbuyer/portal/login>.
2. Log into the new enterprise with the following:
 - For the *Username*, enter **enterprise**.
 - For the *Password*, enter the value you entered when you created the context.
3. Choose *Setup*, then choose *Import Data* from the dropdown list under *Import and Export Tools*, and then choose *OK*.

The *Import Data* page appears.

4. Choose *Create* to start a new import job.
5. Choose *Upload to the Server* and then choose *Next*.
6. Select the modified workbook and choose *Next*.
7. Wait for the import to finish and choose *Next*.

Typically, running the enterprise workbook can take several minutes.

1.5 Create and Verify Buy-Side User

Procedure

For the SAP NetWeaver UME driver, users should be created in SAP Sourcing and the SAP NetWeaver UME with the same username.

For LDAP drivers, depending on how the LDAP was set up, you must perform one of the following:

- Create the user in SAP Sourcing and supply the information FROM the LDAP.

- If you have access, create the account and supply the information TO the LDAP.

In either case, an e-mail is generated, giving the user a path to the application and his or her user name. If the account is created, a temporary password is also mailed. A system property determines whether this information is delivered in the same e-mail or separate e-mails.

1. Choose ► *Setup* → *User Account List* ◀ and create a buy-side user as follows:
 1. On the *Account Properties* tab, enter required information.
 2. On the *Account Management* tab, enter information as follows:
 - Enable User to Login: Select
 - Directory: Select as needed
 - User ID: Type userid
 - Create Directory Account: Select
 - Generate a New Password: Select
 - Send Notification: Select
 3. On the *Security* tab, enter information as follows:
 - Buyer: Select
 - Buyer Manager: Select
 - System Administrator: Select
 - Supplier Administrator: Select
 - Make sure this first user is given Administrator privileges to import the Company Workbook.
 2. Wait for the e-mail to be sent and received. If you do not receive it, check the following:
 - To verify the mail was sent, choose ► *Setup* → *System Administration* → *Processed Messages* ◀.
 - To check for stuck or failed messages, choose ► *Setup* → *System Administration* → *Queued Messages* ◀.
 3. To test the new account, log in using the credentials sent in the e-mail.
 4. Reset your password and choose OK.
- If you can successfully log into the new buy-side account, the context cluster and directory are properly configured and the SMTP server is processing e-mail.

1.6 Create and Verify Sell-Side User

Procedure

Create a sell-side user to test the sell-side portal. A sell -side user is a contact on a supplier record.

1. Choose ► *Supplier Management* → *Create Supplier* ◀.
2. Enter and save the required information.
3. Choose the *Contacts* tab.
4. Under *Supplier Contacts*, choose *Add*.
5. Enter and save the required information.

1.7 Install Company Logo

6. Log in using the credentials provided in the test user e-mail and the sell-side URL: [http://\[hostname:port\]/fsvendor/portal/login](http://[hostname:port]/fsvendor/portal/login).
7. Reset the password as prompted and accept the usage terms.

1.7 Install Company Logo

Procedure

**NOTE**

We do not recommend installing an image larger than 200 x 29.

1. Access the *Login* page: <http://<yourhost>/fsbuyer/portal/login>
2. Log into the new enterprise as follows:
 1. For the *Username*, enter enterprise.
 2. For the *Password*, enter the value you entered when you created the context.
 3. Choose *Login*.
3. Attach the logo as follows:
 1. Choose ► *Setup* → *Organization and Accounting Information* → *Companies* ◀.
 2. Select the enterprise company from the list and choose *Edit Document*.
 3. Attach your logo image to the company using the *Logo Attachment* field.
4. Save your entries.
 1. Choose ► *Setup* → *Configuration* → *System Properties* ◀.
 2. If there is an entry in the property list for *buylogoimage*, select it and choose *Edit*. Otherwise, choose *Create*.
 3. Set the *Property Set* to *userinterface*.
 4. Set the *Property Value* to *custom/companylogo/*.

Resize Company Logo

If you have uploaded a company logo in your source release, you must resize the image to 200x29.

1. Log on to SAP Sourcing as a user with system administrator rights.
2. Choose *Setup*.
3. On the *Master Data* tab, find the *Organization and Accounting* section and choose *Companies*.
4. Choose the company.
5. Choose *Edit*.
6. In the *Logo* field, upload the resized image.

1.8 Specify Internal Address of SAP Sourcing Server

Procedure

When SAP Sourcing is first installed or whenever a new server is added to an application cluster, the Internet address that is used for internal communications within SAP Sourcing is initially set to the

external host name of the server. In many cases, this will result in unexpected or delayed behavior in the application.

If the application landscape includes a network firewall, accessing the server through this name requires exiting the firewall and re-entering. If the firewall blocks incoming traffic on SAP Sourcing's notification ports, this will result in failure to deliver notifications for some events. To avoid this, do the following:

1. Log in as a system administrator.
2. Open the System Information record for editing.
3. Change the value in the Internal Address field to an internal IP address or host name.
4. Save your changes.

1.9 Update Master Time Zone

Procedure

This procedure is required to enable SAP Sourcing to normalize all dates and times that are used in sourcing events. Normalizing allows time fields to be presented differently for each user, according to his or her preferred time zone, while maintaining a consistent reference to the same point in time.

1. Log into SAP Sourcing as a system administrator.
2. Choose ► *Setup* → *Configuration* → *System Properties* ◄.
3. Check to confirm that the alternate values of the valueless value(s) is filled in. Refer to that object as the source of the correct time zone entry.



NOTE

The SAP Sourcing Time Zone Value List Type provides a relatively comprehensive list of java time zone identifiers. To view this list, log on to SAP Sourcing and navigate to ► *Setup* → *Master Data* → *Value List Types and Values* → *Time Zone*. ◄. The *Alternate Name* column of this list contains the java time zone identifier for the corresponding time zone.



EXAMPLE

"America/New_York" is the alternate name of the SAP Sourcing Timezone ValueListValue for "(GMT-5:00) Eastern Standard Time".

1.10 Install License Key

Procedure

You must install a license key before the SAP Sourcing system can be used in production mode.

1. Choose ► *Setup* → *System Administration* → *System Management* → *System Information* ◄.
2. Note the installation ID from the *Installation ID* field on the *Service Registration* tab.
3. Create OSS ticket this ID and a list of the requested modules to license (include the optimizer) to SAP Customer Support. You will receive a .csv file including all the license keys.

1.11 Change Session Timeout

4. Log on as the enterprise user and choose ► *Setup* → *System Administration* → *Import and Export Tools* → *Import Data* ◀.
5. Use the import tool to import the licenses you received from Support, as follows:
 1. On the *Import Wizard: Select a File* screen, type a description such as **License Keys** and choose *Upload Import File* to upload the .csv file. Choose *Next*.
 2. On the *Import Wizard: CSV Contents* screen, select *Module License* as the *Object Type*, choose *Next*, and follow any additional prompts to finish the process. The successful file import is displayed on the *File Import* tab.
6. Choose ► *Setup* → *System Administration* → *System Management* → *System Information* ◀.
7. Choose the *Components* tab and verify that the appropriate licenses are checked under *SRM Module Licenses*.
8. If you are installing the optimizer, verify that a new *Optimizer* tab appears and displays an appropriate *Status Queue* value and JVM information. (If the optimizer is not installed, the *Status Queue* value is OFFLINE and the JVM Information is set to unknown.)

1.11 Change Session Timeout

Procedure



NOTE

This is optional.

The deployment descriptor for the SAP Sourcing application defaults to a 30-minute session timeout or to the value that was set during installation.



NOTE

The above property should be set longer than the below two properties.

To change this setting:

1. Log on as the system user and set the following system property in SAP Sourcing:
`upp.metering.login_inactivity_timeout` and set to the timeout that was chosen when running the configure utility.
2. Property `upp.metering.cleanup_interval` defines the time between runs of the daemon, which removes inactive sessions. It is recommended that this value be set to a value that is slightly larger than the `upp.metering.login_inactivity_timeout` setting is set to.
3. Set the time-out using the configure tool. For information about the configure tool, see the installation guide for SAP Sourcing on SAP Service Marketplace at <http://service.sap.com/eso> ► *SAP Sourcing* ◀.

**NOTE**

Both internal property in SAP Sourcing and configuration tool in NetWeaver should be set to the same value.

1.12 Enable Contract Authoring

Contracts, amendments, and clauses use the Word service. This service must be referenced. For more information, see *Create OfficeAutomationUser Account* in the installation guide for SAP Sourcing on SAP Service Marketplace at <http://service.sap.com/eso> ► SAP Sourcing ◀.

Procedure

Configure a path to the Word service in SAP Sourcing, as follows:

1. Choose ► *Setup* → *System Properties*. ◀
2. From the *Name* dropdown list, choose `contractgen.serviceurl`.
3. Set the value to `<protocol>://<hostname>/<virtual directory>/wordservice.asmx`.

1.13 Configure Workbench

The CLM system is delivered with a base workbench page that is available to all internal users. Additionally, the system is configured with a workbench page intended to be used by CLM contract managers.

The workbench page is established in the system, but requires additional configuration to make it available to the desired users. This configuration is done by adding collaborators to the *Contract Management Workbench* page.

Prerequisites

You must be logged on as the “enterprise” user.

Procedure

Configure the *Contract Management Workbench* page with the individual users or user groups that should also have access to the page.

To do this, go to ► *Setup* → *System Setup* → *Workbench* → *Workbench Page* → *All Workbench Pages* ◀. Edit the *Contract Management* page and add collaborators.

1.14 Configure Branding

The following procedures enable you to change the branding from the default SAP Sourcing to SAP CLM. Four branding items are affected:

- Branding text in the title bar of the browser (for example, SAP Sourcing)

1.14 Configure Branding

- SAP CLM logo image for the buyer login page
- SAP CLM Business Partner logo image for the supplier login page
- Images on the login page
- Images on the splash screen

Procedure

Change the Branding after Installation

1. Choose ► *Setup* → *System Properties* ◀.
2. Change the value of `system.brand_name` to (for example) SAP CLM.

Themes

**NOTE**

The following two steps require editing of themes, see SAP Library for SAP Sourcing on SAP Help Portal at ► <http://help.sap.com> → *Setup* → *Themes*. ◀.

1. Open the current enterprise's theme *Branding* area and choose *Buyer Login Banner* link, then *Image* link. Delete the original path in *Image Path* field, and paste `/images/logos/logo_sapXCLM.gif`.
2. Choose *Delete* on Background Image field.
3. Choose the *Supplier Login Banner* link, then *Image* link. Delete the original path in *Image Path* field, and paste `/images/logos/logo_sapXCLMBusinessPartner.gif`.
4. Choose *Delete* on Background Image field.

More Information

For more information about branding your login page, splash screen, and portal page, see SAP Library for SAP Sourcing on SAP Help Portal at <http://help.sap.com> ► *Setup* → *Themes* ◀.

2 Basic Settings for Search in SAP Sourcing and CLM

2.1 Search Via KM and Trex

2.1.1 Configuration of Knowledge Management Content Search and TREX

**NOTE**

Instead of KM content search, we recommend using global search to carry out free-text content search on documents and attachments. This simplifies your landscape because global search does not require a TREX server. For information about global search, see SAP Library for SAP Sourcing on SAP Help Portal at ► <http://help.sap.com> → *SAP Business Suite* → *SAP Sourcing* → *Getting Started* → *General Functions* → *Global Search* ◀. If your database is Oracle 10.2.0.4, note that global search supports Microsoft Office Word 2007 documents only on Oracle 11.2.0.1 and higher.

Knowledge Management (KM) content search and Search and Classification (TREX) are optional features that enable you to carry out free-text content search on contract documents, attachments, and clauses. The content search capability is provided by the KM server and TREX server. The TREX server indexes the documents and provides the functionality to perform content search on the indexed documents. The KM server is used as a channel to index the documents in order to use the TREX client API that is available on the KM server. Each installation of the KM and TREX server can serve multiple SAP Sourcing application servers.

Prerequisites

KM content search and TREX are installed.

For more information, see *Install Knowledge Management Content Search and TREX* in the installation guide for SAP Sourcing on SAP Service Marketplace at <http://service.sap.com/eso> ► *SAP Sourcing* ◀.

2.1.1.1 Configure TREX Server in KM Server

Procedure

To configure the TREX server in the KM server, see the following links:

- Configuration of the TREX Services in the SAP J2EE Engine: http://help.sap.com/erp2005_ehp_03/helpdata/EN/26/eeb73975a4e94b85c70de1c020b2f1/frameset.htm

2.1 Search Via KM and Trex

- Specifying the Address of the TREX Name Server: http://help.sap.com/erp2005_ehp_03/helpdata/EN/c7/e0d13f7fb44c21e10000000a1550b0/content.htm.

In addition, you must perform the following additional configuration steps:

1. Open the `TREXqueueServer.ini` file in the TREX server and do the following:
 1. In the preprocessor section, check the pool size and ensure that it is not greater than **1**.
 2. After changing the configuration, restart the TREX server.
2. Increase the value of the *Timeout* parameter for the Crawler, as follows:
 1. Navigate to ► *System Administration* → *System Configuration* → *Knowledge Management* → *Content Management* → *Global Services* → *Crawlers Parameters* → *Index Management Crawler* → *standard* → *Document Retrieval Timeout* ⚙️.
 2. Set the value to **200**.

2.1.1.2 Deploy KM SCA File to KM Server Using SDM

In this step, you:

- Deploy the custom repository manager portal application to the KM server. This repository manager makes the SAP Sourcing documents accessible to the KM. The name of the component is `srm/xclm/kmc/rms`.
- Deploy and configure the SAP Sourcing data provider proxy. The name of the component is `srm/xclm/kmc/services/wsproxy`.

Procedure

To deploy the KM SCA file (`SRMKMXCLMJAVA00_0.sca`), see the following:

- Deployment: http://help.sap.com/erp2005_ehp_03/helpdata/EN/92/fb673ba8ecf22fe10000000a11402f/content.htm.
- Deploying Components: http://help.sap.com/erp2005_ehp_03/helpdata/EN/43/2ae0ec69742182e10000000a114cbd/content.htm.

2.1.2 Authentication Between KM Server and SAP Sourcing Server

2.1.2.1 Overview of Authentication Between KM and TREX Server and SAP Sourcing Server

You can configure authentication between the KM server and the SAP Sourcing server using basic authentication.

2.1.2.2 Configure Basic Authentication for KM

There are two steps to configure authentication between the KM server and the SAP Sourcing server:

2.1 Search Via KM and Trex

1. Configure the Repository Manager
2. Configure Repository Managers for multiple SAP Sourcing sections

Procedure

Configure the Repository Manager

To configure the SAP Sourcing repository manager, navigate to the following location in the Enterprise Portal: ► *System Administration* → *System Configuration* → *Knowledge Management* → *Content Management* → *Repository Managers* → *SAP Sourcing Repository Manager* ◀.

By default, a single instance of a repository manager is available with the deployment. Configure this default instance for the first SAP Sourcing server, as follows:

1. Enter the SAP Sourcing server URL as: http://<host_name>:<port_number>/<context>/services/KMDocumentHierarchyHomeService
2. Create an SAP Sourcing user with KM Administrator security profile. The user should be created only when using Basic Authentication. For information about creating a new user, see SAP Library for SAP Sourcing on SAP Help Portal at <http://help.sap.com> ► *SAP Business Suite* → *SAP Sourcing* ◀.
3. For Basic Authentication, enter the User Name and Password of the user you just created.
4. Leave the remaining fields unedited.

Configure Repository Managers for Multiple SAP Sourcing Servers



NOTE

Perform this step only when the KM server is shared by multiple SAP Sourcing applications. In this case, the Repository Manager name must be unique.

To connect multiple SAP Sourcing servers to the same KM server, create corresponding instances of Repository Manager. To create additional instances of the repository manager, do the following:

1. Click the Duplicate button under the SAP Sourcing repository manager list.
2. Follow the above steps for *Configure the Repository Manager*.

2.1.2.3 Set Up KM HTTP Destination

KM accesses the SAP Sourcing system to download document content. This connection should be configured by creating the HTTP destination on the KM side.

Procedure

1. Open the Visual Administrator of the SAP NetWeaver Java Application Server on which the Java application is running.
2. Under *Cluster*, choose ► *<your_server>* → *Services* → *Destinations* ◀.
3. Create an HTTP destination called **DOWNLOAD_ESRC_DOC_CONTENT**.

2.1 Search Via KM and Trex

4. To activate basic authentication, select *NONE* as the authentication method and leave the *Login Password* and *URL* fields blank.
5. Save your entries.
6. If you changed an already operational destination, restart the Java application server.

2.1.3 Set Up KM System Properties

These configuration properties can be set at the system or the enterprise level. When set at the system level, the property applies to the complete system. When set at the enterprise level, the property applies to the specific enterprise. The enterprise-level settings will overwrite the system-level settings.

Procedure

1. Log on to SAP Sourcing using the relevant system or enterprise user name and password.
2. Choose *Setup*.
3. Do one of the following:
 - For a system user, choose ► *System* → *System Properties* ◀.
 - For an enterprise user, choose ► *System Setup* → *Configuration* → *System Properties* ◀.
4. Edit the following property to change the value from FALSE to TRUE.

Set	Name/Property	Value	Description
contractgen	contractgen.km_search.enabled	TRUE	Enable KM search

5. If the default number of search results obtained from KM needs to be changed, edit the following system property. The default value for the property is **100**.

Set	Name/Property	Value	Description
contractgen	contractgen.km_search_webservice.max_results	1000	Maximum number of search results

6. Create the following system properties:

Set	Name/Property	Value	Description
system	system.webservices.enabled	TRUE	Enables Web Services framework. If enabled, KM and other WS consumers can call SAP Sourcing/ SAP CLM Web Services methods
contractgen	contractgen.km_search_webservice.username	<User name for KM server>	KM server user name

2.1 Search Via KM and Trex

Set	Name/Property	Value	Description
contractgen	contractgen.km_search_webservice.password	<Password for KM server>	KM server password
contractgen	contractgen.km_search_webservice.url	<protocol>:// <hostname>:/E SourcingKmcServicesWS/ ESourcingKmcServicesConfig? style=document	This property sets a reference to the KM web service
contractgen	contractgen.km_search.not_supported_types	List of file extensions used that are not supported by	A comma-separated list of file extensions unsupported by TREX used in SAP Sourcing/ SAP CLM for generating/ uploading contract documents / attachments/ clauses. Use file extensions only, without periods (for example, TIF, TIFF, and so on.) For a complete list of supported file formats, see File Formats supported by TREX. Customers should determine whether TREX supports indexing for the formats used for their contract documents and

2.2 Set Up Indexing

Set	Name/Property	Value	Description
		TREX <file ext1, file ext2>. For example, tif, gif, jpg.	attachments. The system property should be set accordingly.
contractgen	contractgen.km_search.repository_prefix	<KM Repository Name>	The repository manager in the KM server to which the current SAP Sourcing instance is pointing

2.2 Set Up Indexing

The TREX index server indexes and classifies documents and answers search queries. An index is a TREX data structure that allows you to find document text efficiently. For additional details, see the following link:

Procedure

- Create three indexes for the root context as follows:
 - Master Agreement (Contract Documents and Attachments)
 - Subagreement (Contract Documents and Attachments)
 - Clause Documents
- Assign the data source to the index. Each index object should be assigned to the corresponding SAP Sourcing repository manager document folders as a data source.

► root → EsourcingEnterprise Context ID → Enterprise Sub Context ID → Class ID ◄

Company	Class ID Value	Indices
Master Agreement	1004	CONTEXT_MA_INDEX
Subagreement	1003	CONTEXT_SA_INDEX
Clauses	1818	CONTEXT_CLAUSES_INDEX



NOTE

When creating an index for the root context, the Enterprise Context ID and Enterprise Subcontext ID are the same.

- If you have multiple contexts, repeat steps 1 and 2 for each context.
- Schedule the time when the indexes are to be executed. Schedule the time when the indexing process should start on the TREX server. Each index should be assigned a different time slot to reduce the load on the TREX server.

**RECOMMENDATION**

We recommend that you schedule the indexing at around midnight when usage of the application is minimal. The suggested value for the time interval for each index is 15 minutes.

**NOTE**

The content search is available only for documents that are already indexed. Users cannot search on document changes until those documents are indexed. If a user searches for a word that has recently been added to the document, the search results may not include the modified document. Indexing time is dependent on the web service update time and the indexing schedule routine. The TREX queue parameters can be configured as in the following help link to change the response time for indexing the documents.

Monitoring the Indexing Status of Documents

At any point, you can monitor the indexing status the SAP Sourcing documents using the Indexing Monitor in the Enterprise Portal. To do this, navigate to the following location in the Enterprise Portal:

► *System Administration* → *System Configuration* → *Knowledge Management* → *Index Administration* → *Indexing*

Monitor ⚡. This page displays the status of each created index, along with the numbers of documents that have been indexed or are in process, and those for which indexing failed.

More Information

- Creating an Index and Assigning Data Sources: ► <http://help.sap.com> → *Knowledge Management* → *Administration Guide* → *System Administration* → *System Configuration* → *Index Administration iView* → *Creating an Index* ⚡ and *Assigning Data Sources*.
- Optimizing Performance: ► <http://help.sap.com> → *Knowledge Management* → *Technical Operations in Detail* → *TREX Admin Tools* → *TREX Admin Tool (Stand-Alone)* → *Queue Area* → *Queue Parameters* → *Start Condition* → *Optimizing Performance* ⚡
- Start Condition: ► <http://help.sap.com> → *Knowledge Management* → *Technical Operations in Detail* → *TREX Admin Tools* → *TREX Admin Tool (Stand-Alone)* → *Queue Area* → *Queue Parameters* → *Start Condition* ⚡.

2.3 Troubleshoot KM Installation

This topic includes the following areas:

- Troubleshooting Indexing
- Adding KM Workbench Channels

Procedure**Troubleshooting Indexing**

If indexing fails for some documents, check the KM and TREX server configuration, as follows:

1. Open the `TREXqueueServer.ini` file in the TREX server.

2. In the preprocessor section, check the pool size and ensure that it is not greater than **1**.
3. After changing the configuration, restart the TREX server. Trigger reindexing for the failed documents.
4. Increase the value of the Timeout parameter for the Crawler. This parameter can be changed in
► *System Administration* → *System Configuration* → *Knowledge Management* → *Content Management* → *Global Services*
→ *Crawlers Parameters* → *Index Management Crawler* → *Standard* → *Document Retrieval Timeout* ◄. Set the value
to **200**. After changing the value, trigger reindexing for the failed documents.

Adding KM Workbench Channels

If the KM Search channels (Contract Content Search and Clause Content Search) are not visible on the Workbench, add them.

For information about adding workbench channels, see SAP Library for SAP Sourcing on SAP Help Portal at <http://help.sap.com>.

3 Configuring Supplier Workflow Management

By default supplier workflow management feature is disabled in SAP Sourcing. To enable this feature you need to perform following general steps:

1. Create Workflow Definitions
2. Create Supplier Configurable Phase Definition
3. Create/Modify Supplier Type
4. Create Supplier Field Access Definition (optional)
5. Configure Security Templates
6. Assign Supplier Types to Suppliers
7. Configure Supplier UI Mapping

The following subsections provide details for each of these steps.

Create Workflow Definitions

1. Click *Setup* in the toolbar at the top of the page and select *Platform*.
2. In the *Workflow* section of *System Setup*, click on *Workflow Definitions*.
3. On the *Workflow Definitions List* page, click *New*.
4. On the *Workflow Definition Summary* page, fill in the fields with workflow information. For details, see the **Field Help for Workflow Definition Summary** page.
5. Click the *Add New Version* button to add a process template to the workflow definition. For details, see the **Field Help for Process Template Dialog Box** page.
6. Click the *Save* button in the toolbar.
7. Create another Workflow Definition if necessary.

Create Supplier Configurable Phase Definition

Supplier phases determine the actions that can be performed on supplier registration and modification requests. To create a supplier configurable phase definition:

1. Click *Setup* in the toolbar at the top of the page and select *Platform*.
2. In the *Suppliers* section of *Document Setup*, click on *Supplier Configurable Phase Definition*.
3. On the *Supplier Configurable Phase Definition List* page, click *New*.
4. On the *Header* page, fill in the fields with phase information. For details, see the **Field help for Supplier Configurable Phase Definition Header** page.
5. Click *Add* to add phases to the definition.
6. In the dialog box that appears, select each phase to include in the phase definition and click *OK*.

7. (optional) Click the *Edit* icon for each phase to edit phase information, including the sequence of phases in the workflow. On this page you can assign workflow definition and supplier field access definition. For details, see the **Field help for Supplier Configurable Phase Header** page.
8. Click the *Save* button in the toolbar.
9. Create another Supplier Configurable Phase Definition if necessary.

Create/Modify Supplier Type

Supplier types can be used to determine which workflow phase definition to enable in a supplier registration or modification requests. The **Configurable Phase Definition** field of Supplier Type is responsible for defining whether registration/modification requests will use workflow and which phases will have these requests. If **Configurable Phase Definition** is empty then supplier registration and modification requests will not have configured phases and any supplier administrator will be able to approve or deny request of such type as it was in previous versions of SAP Sourcing. To enable supplier workflow management some supplier-configurable phase definition must be assigned to supplier types. SAP Sourcing provides one default supplier type. You can modify this type and create new ones.

1. Click *Setup* in the toolbar at the top of the page, and select *Platform*.
2. In the *Suppliers* section of *Document Setup*, select *Supplier Type*.
3. On the *Supplier Type List* page, click *New* for creating new type or select existing from the list for editing.
4. On the *Type* page, fill in necessary fields. On this page you can assign Supplier Configurable Phase Definition to Supplier Type. For details, see the **Field Help for Supplier Type** page.

Create Supplier Field Access Definition

This step is optional.

Supplier Field Access Definition allows you to configure access rules for approver on specific phase.

To create a supplier field access definition:

1. Click *Setup* in the toolbar at the top of the page and select *Platform*.
2. In the *Suppliers* section of *Document Setup*, select *Supplier Field Access Definition*.
3. On the *Supplier Field Access Definition List* page, click *New*.
4. On the UI page fill in necessary fields. For details, see the **Field Help for Supplier Field Access Definition** page.
5. Click the *Save* button in the toolbar.
6. Open existing Supplier Configurable Phase Definition.
7. Click *Edit*.
8. Click the *Edit* icon for the phase where you want to configure access rights for approvers. This should be the approval phase.
9. Click the *Lookup* icon to select a supplier field access definition to associate with this phase.
10. Save the Supplier Configurable Phase Definition.

Configure Security Templates

This is a very important configuration step. In the case of supplier registrations/modifications without configured workflows, requests can be viewed and approved by any Supplier Administrator. But in the case of new functionality collaborator, security is used to define access rights. A document security template is a set of rules governing the way an SAP Sourcing document assigns collaborator roles. You should configure collaborators, defined by role and user type, that are automatically added to a registration and modification requests.

You must configure two security templates: first for Workflow Supplier Registration and second for Workflow Supplier Modification. The following must be configured in these templates:

- The document owner must be any specified buy-side user. Otherwise automatic phase transitions will not work for sell-side and the phase will need to be changed manually by any buy-side user.
- Document creator (current user) must be added to collaborator list with a role that allows viewing, editing, and changing phases (e.g. Collaborator).
- Supplier administrators should be included to collaborator list to be able view and manually complete registration/modification requests, in case automatic completion should fail for some reason.

Assign Supplier Type to Supplier

After the upgrade procedure, one default supplier type is created and assigned to all suppliers. It will be used to recognize phases for supplier modifications via workflow. The supplier type can be changed for any supplier, as follows:

1. Open the supplier whose supplier type you want to reassign.
2. Press *Edit*.
3. Click the *Lookup* icon under the *Document Type* field.
4. Select a new supplier type.
5. Click *Ok*.
6. Click *Save*



NOTE

When the supplier is created via workflow, the supplier type used for creation is assigned to created supplier.

Configure Supplier UI Mapping

The supplier type can be mapped to any supplier-side self-registration form. The Supplier Type UI includes a collection of Supplier registration UI Mappings. This allows you to configure the mapping between supplier type and self-registration forms:

1. Open any Supplier Type
2. Click *Edit*.

3. Click *Add* under *Sell-Side Supplier Registration UI Mapping* to add the UI page that will be mapped to this type.
4. Click *Save*.

**NOTE**

The self-registration form can be assigned to only one supplier type. If no form is assigned to a supplier type, the default supplier type will be used for registration.

Typographic Conventions

Example	Description
<Example>	Angle brackets indicate that you replace these words or characters with appropriate entries to make entries in the system, for example, “Enter your <User Name>”.
► Example → Example ◀	Arrows separating the parts of a navigation path, for example, menu options
Example	Emphasized words or expressions
<code>Example</code>	Words or characters that you enter in the system exactly as they appear in the documentation
http://www.sap.com	Textual cross-references to an internet address
/example	Quicklinks added to the internet address of a homepage to enable quick access to specific content on the Web
123456	Hyperlink to an SAP Note, for example, SAP Note 123456
Example	<ul style="list-style-type: none"> Words or characters quoted from the screen. These include field labels, screen titles, pushbutton labels, menu names, and menu options. Cross-references to other documentation or published works
Example	<ul style="list-style-type: none"> Output on the screen following a user action, for example, messages Source code or syntax quoted directly from a program File and directory names and their paths, names of variables and parameters, and names of installation, upgrade, and database tools
EXAMPLE	Technical names of system objects. These include report names, program names, transaction codes, database table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE
EXAMPLE	Keys on the keyboard

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