

## **Title: How do event based qualifications work?**

### **Summary:**

This post illustrates how you can use the event based initiatives and qualifications to qualify your suppliers automatically.

Qualifying suppliers strategically may include screening on whether they meet the required safety and quality standards, or social and environmental responsibility, or whether the supplier meets sufficient levels of different certifications.

It involves various steps starting from sending questionnaires to suppliers and internal responders, accepting their responses, evaluating their responses, and lastly, qualifying the supplier. These steps are applied to each and every supplier before finalizing their qualification. This process can easily get monotonous and time consuming.

You can automate the process of creating initiatives and qualifications by defining simple rules based on various business events for your procurement business unit. The business events include supplier registration, supplier registration approval, supplier promotion and requalification.

Procedure to set up rule sets for qualifying suppliers for each business event:

#### **1. Supplier Registration Based Automation**

The qualification areas you set up here will appear to the supplier during external registration. You can define rules for each business relationship type: Prospective or Spend Authorized or both. In addition to presenting the supplier with a qualification questionnaire during the registration process, the application can automatically create qualifications for those qualification areas for which all required questions have a response from the supplier. These qualifications will be available for you to use after the supplier registration is approved.

For qualification areas on the rule set where additional information is required either from the supplier or the internal responder, the application automatically creates an initiative and launches it.

In this example, the qualification manager would like to qualify prospective suppliers on environmental responsibility and worker health and safety. If the company is a small business, Small Business Certification is also included in the questionnaire during supplier registration.

## Edit Rule Set: Vision Operations Rule Set

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\* Rule Set: Vision Operations Rule Set  
Description:

\* Procurement BU: Vision Operations +  
Status: Active

Registration

Registration Approval  Use question branching  Automatically create qualifications

Supplier Promotion

Default Information

Rules

View  Add Condition Add Qualification Areas Business Relationship All

Qualification Area	Business Relationship	Question Branching
Always displayed	Prospective	
Environmental Responsibility		
Worker Health and Safety		
Business Classification Small Business: Equals: Yes	Prospective	
Small Business Certification		

## 2. Supplier Registration Approval Based Automation

In addition to creating rules for supplier registration, you can create rules that get triggered once the supplier registration is approved. You can define the same or different rules for external supplier registration approval and internal supplier registration approval. When a supplier registration is approved, the registration approval rules are triggered. An initiative is created and launched; questionnaires are sent to the supplier and internal responders as needed.

In the initiative and corresponding questionnaire, the qualification areas defined under the registration approval event are combined with any qualification areas set up under the Supplier Registration business event when there are required questions missing responses from either the supplier or internal responder.

In the example below, an initiative is created with qualification area Financial Viability upon registration approval whether the request is from external or internal supplier registration. If the Worker Health and Safety qualification defined earlier under Registration still has any missing responses for this supplier, then the initiative has both the Financial Viability and the Worker Health and Safety qualification areas.

\* Rule Set: Vision Operations Rule Set  
 Description:

\* Procurement BUS: Vision Operations +  
 Status: Active

Registration Approval Rules

Supplier Promotion View [Add Condition] [Add Qualification Areas] Registration Source: All

Qualification Area	Registration Source	Question Branching
Always displayed	Both	
Financial Viability		

### 3. Supplier Promotion Based Automation

Optionally, you can define additional rules for the supplier promotion event. Supplier promotion rules are triggered when a buying organization intends to do business with a supplier and the supplier is promoted from prospective to spend authorized. As soon as the supplier’s promotion request gets approved, the system automatically creates an initiative to qualify the supplier. Once the initiative is launched and questionnaires are sent, the initiative is managed like any other initiative.

In the example below, an initiative is created with qualification area Compliance upon supplier promotion approval.

\* Rule Set: Vision Operations Rule Set  
 Description:

\* Procurement BUS: Vision Operations +  
 Status: Active

Supplier Promotion Rules

Supplier Promotion View [Add Condition] [Add Qualification Areas]

Qualification Area	Registration Source	Question Branching
Always displayed		
Compliance		

### 4. Provide default information for events

For each business event that has qualification areas defined, you must specify the default value for the owner of the initiatives or qualification created and the internal responder when internal questions are present.

In addition, you can provide the default introduction text or attachments for each automatically created questionnaire here.

Edit Rule Set: Vision Operations Rule Set Inactivate Save Save and Close Cancel

\* Rule Set: Vision Operations Rule Set  
Description:

\* Procurement BUs: Vision Operations +  
Status: Active

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Registration  
Registration Approval  
Supplier Promotion  
Default Information

Default Information

* Procurement BU	Event	* Owner	Internal Responder
Vision Operations	All	Dapolito, Cody	Furey, Clare

Questionnaire

Registration Introduction	<input type="text"/>	Registration Attachments	None +
Supplier Introduction	<input type="text"/>	Supplier Attachments	None +
Internal Introduction	<input type="text"/>	Internal Attachments	None +

The requalification business event is triggered on the qualifications themselves instead of the rule set except that the default value is defined here for the owner and internal responder.

When you activate this rule set for your procurement business units, initiatives and qualifications will be created automatically to qualify your suppliers based on certain business events of the supplier lifecycle.

You can find the release readiness training materials for this feature [here](#).