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Preface

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- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Applications Release Online Documentation CD available on Oracle MetaLink and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

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Please give your name, address, electronic mail address, and telephone number (optional).

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If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.
Preface

Intended Audience

Welcome to Release 12 of the Oracle iSupplier Portal Implementation Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Computer desktop application usage and terminology

If you have never used Oracle Applications, we suggest you attend one or more of the Oracle Applications training classes available through Oracle University.

See Related Information Sources on page x for more Oracle Applications product information.

TTY Access to Oracle Support Services

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Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site.
Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Structure

1 Overview of Oracle iSupplier Portal
2 Oracle iSupplier Portal Setup
3 Implementing Supplier User Management
4 Implementing Flexible Prospective Supplier Registration (and Profile Management)
5 Supplier and Supplier User Administration
6 Application Technology and Customizations
7 Oracle iSupplier Portal Workflows

Related Information Sources

This document is included on the Oracle Applications Document Library, which is supplied in the Release 12 DVD Pack. You can download soft-copy documentation as PDF files from the Oracle Technology Network at http://otn.oracle.com/documentation, or you can purchase hard-copy documentation from the Oracle Store at http://oraclestore.oracle.com. The Oracle E-Business Suite Documentation Library Release 12 contains the latest information, including any documents that have changed significantly between releases. If substantial changes to this book are necessary, a revised version will be made available on the online documentation CD on Oracle MetaLink.

If this guide refers you to other Oracle Applications documentation, use only the Release 12 versions of those guides.

For a full list of documentation resources for Oracle Applications Release 12, see Oracle Applications Documentation Resources, Release 12, OracleMetaLink Document 394692.1.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).
• **PDF** - PDF documentation is available for download from the Oracle Technology Network at http://otn.oracle.com/documentation.

• **Online Help** - Online help patches (HTML) are available on OracleMetaLink.

• **About Documents** - Refer to the About Document for the mini-pack or family pack that you have installed to learn about new documentation or documentation patches that you can download. About Documents are available on OracleMetaLink.

• **Oracle MetaLink Knowledge Browser** - The OracleMetaLink Knowledge Browser lets you browse the knowledge base, from a single product page, to find all documents for that product area. Use the Knowledge Browser to search for release-specific information, such as FAQs, recent patches, alerts, white papers, troubleshooting tips, and other archived documents.

• **Oracle eBusiness Suite Electronic Technical Reference Manuals** - Each Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications and integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on OracleMetaLink.

**Related Guides**

You should have the following related books on hand. Depending on the requirements of your particular installation, you may also need additional manuals or guides.

**Oracle Applications Upgrade Guide: Release 11i to Release 12:**

This guide provides information for DBAs and Applications Specialists who are responsible for upgrading a Release 11i Oracle Applications system (techstack and products) to Release 12. In addition to information about applying the upgrade driver, it outlines pre-upgrade steps and post-upgrade steps, and provides descriptions of product-specific functional changes and suggestions for verifying the upgrade and reducing downtime.

**Oracle Applications Patching Procedures:**

This guide describes how to patch the Oracle Applications file system and database using AutoPatch, and how to use other patching-related tools like AD Merge Patch, OAM Patch Wizard, and OAM Registered Flagged Files. Describes patch types and structure, and outlines some of the most commonly used patching procedures. Part of Maintaining Oracle Applications, a 3-book set that also includes Oracle Applications Maintenance Utilities and Oracle Applications Maintenance Procedures.

**Oracle Applications Maintenance Procedures:**

This guide describes how to use AD maintenance utilities to complete tasks such as compiling invalid objects, managing parallel processing jobs, and maintaining snapshot information. Part of Maintaining Oracle Applications, a 3-book set that also includes
Oracle Applications Patching Procedures and Oracle Applications Maintenance Utilities.

Oracle Applications Concepts:
This book is intended for all those planning to deploy Oracle E-Business Suite Release 12, or contemplating significant changes to a configuration. After describing the Oracle Applications architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle Applications Multiple Organizations Implementation Guide:
This guide describes the multiple organizations concepts in Oracle Applications. It describes in detail on setting up and working effectively with multiple organizations in Oracle Applications.

Oracle Daily Business Intelligence Implementation Guide:
This guide describes how to implement Oracle Daily Business Intelligence, including information on how to create custom dashboards, reports, and key performance indicators.

Oracle Daily Business Intelligence User Guide:
This guide describes how to use the preseeded Daily Business Intelligence dashboards, reports, and key performance indicators.

Oracle Data Librarian User Guide:
This guide describes how to use Oracle Data Librarian to establish and maintain the quality of the Trading Community Architecture Registry, focusing on consolidation, cleanliness, and completeness. Oracle Customer Data Librarian has all of the features in Oracle Customers Online, and is also part of the Oracle Customer Data Management product family.

Oracle E-Business Tax User Guide:
This guide describes the entire process of setting up and maintaining tax configuration data, as well as applying tax data to the transaction line. It describes the entire regime-to-rate setup flow of tax regimes, taxes, statuses, rates, recovery rates, tax jurisdictions, and tax rules. It also describes setting up and maintaining tax reporting codes, fiscal classifications, tax profiles, tax registrations, configuration options, and third party service provider subscriptions. You also use this manual to maintain migrated tax data for use with E-Business Tax.

Oracle E-Business Tax Implementation Guide:
This guide provides a conceptual overview of the E-Business Tax tax engine, and describes the prerequisite implementation steps to complete in other applications in order to set up and use E-Business Tax. The guide also includes extensive examples of setting up country-specific tax requirements.

Oracle E-Business Tax Reporting Guide:
This guide explains how to run all tax reports that make use of the E-Business Tax data extract. This includes the Tax Reporting Ledger and other core tax reports, country-specific VAT reports, and Latin Tax Engine reports.

**Oracle E-Business Tax: Vertex Q-Series and Taxware Sales/Use Tax System Implementation Guide**

This guide explains how to setup and use the services of third party tax service providers for US Sales and Use tax. The tax service providers are Vertex Q-Series and Taxware Sales/Use Tax System. When implemented, the Oracle E-Business Tax service subscription calls one of these tax service providers to return a tax rate or amount whenever US Sales and Use tax is calculated by the Oracle E-Business Tax tax engine. This guide provides setup steps, information about day-to-day business processes, and a technical reference section.

**Oracle Financials and Oracle Procurement Functional Upgrade Guide: Release 11i to Release 12:**

This guide provides detailed information about the functional impacts of upgrading Oracle Financials and Oracle Procurement products from Release 11i to Release 12. This guide supplements the Oracle Applications Upgrade Guide: Release 11i to Release 12.

**Oracle Financials Glossary:**

The glossary includes definitions of common terms that are shared by all Oracle Financials products. In some cases, there may be different definitions of the same term for different Financials products. If you are unsure of the meaning of a term you see in an Oracle Financials guide, please refer to the glossary for clarification. You can find the glossary in the online help or in the Oracle Financials Implementation Guide.

**Oracle Financials Implementation Guide:**

This guide provides information on how to implement the Oracle Financials E-Business Suite. It guides you through setting up your organizations, including legal entities, and their accounting, using the Accounting Setup Manager. It covers intercompany accounting and sequencing of accounting entries, and it provides examples.

**Oracle General Ledger Implementation Guide:**

This guide provides information on how to implement Oracle General Ledger. Use this guide to understand the implementation steps required for application use, including how to set up Accounting Flexfields, Accounts, and Calendars.

**Oracle General Ledger Reference Guide**

This guide provides detailed information about setting up General Ledger Profile Options and Applications Desktop Integrator (ADI) Profile Options.

**Oracle General Ledger User’s Guide:**

This guide provides information on how to use Oracle General Ledger. Use this guide to learn how to create and maintain ledgers, ledger currencies, budgets, and journal entries. This guide also includes information about running financial reports.

**Oracle iProcurement Implementation and Administration Guide:**
This manual describes how to set up and administer Oracle iProcurement. Oracle iProcurement enables employees to requisition items through a self-service, Web interface.

**Oracle iReceivables Implementation Guide:**

This guide provides information on how to implement Oracle iReceivables. Use this guide to understand the implementation steps required for application use, including how to set up and configure iReceivables, and how to set up the Credit Memo Request workflow. There is also a chapter that provides an overview of major features available in iReceivables.

**Oracle Payables User Guide:**

This guide describes how to use Oracle Payables to create invoices and make payments. In addition, it describes how to enter and manage suppliers, import invoices using the Payables open interface, manage purchase order and receipt matching, apply holds to invoices, and validate invoices. It contains information on managing expense reporting, procurement cards, and credit cards. This guide also explains the accounting for Payables transactions.

**Oracle Payables Implementation Guide:**

This guide provides you with information on how to implement Oracle Payables. Use this guide to understand the implementation steps required for how to set up suppliers, payments, accounting, and tax.

**Oracle Payables Reference Guide:**

This guide provides you with detailed information about the Oracle Payables open interfaces, such as the Invoice open interface, which lets you import invoices. It also includes reference information on purchase order matching and purging purchasing information.

**Oracle Procurement Contracts Online Help:**

This guide is provided as online help only from the Oracle Procurement Contracts application and includes information about creating and managing your contract terms library.

**Oracle Procurement Contracts Implementation and Administration Guide:**

This guide describes how to set up and administer Oracle Procurement Contracts. Oracle Procurement Contracts enables employees to author and maintain complex contracts through a self-service, Web interface.

**Oracle Purchasing User’s Guide:**

This guide describes how to create and approve purchasing documents, including requisitions, different types of purchase orders, quotations, RFQs, and receipts. This guide also describes how to manage your supply base through agreements, sourcing rules, and approved supplier lists. In addition, this guide explains how you can automatically create purchasing documents based on business rules through integration with Oracle Workflow technology, which automates many of the key procurement...
processes.

Oracle Receivables User Guide:
This guide provides you with information on how to use Oracle Receivables. Use this guide to learn how to create and maintain transactions and bills receivable, enter and apply receipts, enter customer information, and manage revenue. This guide also includes information about accounting in Receivables. Use the Standard Navigation Paths appendix to find out how to access each Receivables window.

Oracle Receivables Implementation Guide:
This guide provides you with information on how to implement Oracle Receivables. Use this guide to understand the implementation steps required for application use, including how to set up customers, transactions, receipts, accounting, tax, and collections. This guide also includes a comprehensive list of profile options that you can set to customize application behavior.

Oracle Receivables Reference Guide:
This guide provides you with detailed information about all public application programming interfaces (APIs) that you can use to extend Oracle Receivables functionality. This guide also describes the Oracle Receivables open interfaces, such as AutoLockbox which lets you create and apply receipts and AutoInvoice which you can use to import and validate transactions from other systems. Archiving and purging Receivables data is also discussed in this guide.

Oracle Sourcing Implementation and Administration Guide:
This guide contains information on how to implement Oracle Sourcing to enable participants from multiple organizations to exchange information, conduct bid and auction processes, and create and implement buying agreements. This allows professional buyers, business experts, and suppliers to participate in a more agile and accurate sourcing process.

Oracle Supplier Scheduling User’s Guide:
This guide describes how you can use Oracle Supplier Scheduling to calculate and maintain planning and shipping schedules and communicate them to your suppliers.

Oracle iProcurement Implementation and Administration Guide:
This manual describes how to set up and administer Oracle iProcurement. Oracle iProcurement enables employees to requisition items through a self–service, Web interface.

Oracle Procurement Contracts Implementation and Administration Guide:
This manual describes how to set up and administer Oracle Procurement Contracts. Oracle Procurement Contracts enables employees to author and maintain complex contracts through a self–service, Web interface.

Oracle Trading Community Architecture User Guide:
This guide describes the Oracle Trading Community Architecture (TCA) and how to
use features from the Trading Community Manager responsibility to create, update, enrich, and cleanse the data in the TCA Registry. It also describes how to use Resource Manager to define and manage resources.

For a full list of documentation resources for Oracle Applications Release 12, see Oracle Applications Documentation Resources, Release 12, OracleMetaLink Document 394692.1.”

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite’s business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.
Overview of Oracle iSupplier Portal

This chapter covers the following topics:

- Product Overview
- Core Features of Oracle iSupplier Portal
- Purchase Order Collaboration
- Shipment Notices
- Invoices and Payments
- Inventory Management
- Supplier Management
- Buying Company View
- Key Business Flows
- Purchase Order Acknowledgement
- Create Advanced Shipment Notice or Advanced Shipment Billing Notice
- Create Invoice

Product Overview

Oracle iSupplier Portal enables secure, self-service business transactions between companies and their suppliers. It provides suppliers with the ability to use a standard Web browser to directly manage business transactions and access secure information.

Oracle iSupplier Portal provides a collaborative platform for a buyer to manage relationships with their global supply base. With Oracle iSupplier Portal, suppliers can receive immediate notifications and respond to events in the purchasing and planning process. Oracle iSupplier Portal provides the framework that enables buyers and suppliers to communicate key business transactions while enabling the ability to search, monitor, revise, and review.
Core Features of Oracle iSupplier Portal

Purchase Order Collaboration

View and Acknowledge Purchase Orders

Oracle iSupplier Portal enables suppliers to view purchase order detail, such as terms and conditions, lines, shipments, and attachments. When a suppliers navigate to the Purchase Orders page, they can view all of their purchase orders.

Buying companies may request acknowledgement of a purchase order in order to ensure the supplier has received, reviewed the details of, and accepted or rejected a purchase order. If a buying company requests acknowledgement of a purchase order, suppliers receive a notification requiring their response. Suppliers may then acknowledge purchase orders online, or accept or reject the order using notifications. When suppliers respond to a purchase order acknowledgement, the system automatically updates the purchase order and sends notification to the buyer.

Submit Purchase Order Change Requests and Split Shipments

Oracle iSupplier Portal enables suppliers to request changes to purchase orders when modifications are needed to fulfill an order. Suppliers can request changes during or after purchase order acknowledgement.

In some cases, a supplier can only partially ship the quantity of goods ordered for a given date. In this case, suppliers may submit a split shipment change request. This request informs the buyer the number of items that the supplier can deliver and their delivery date. Suppliers may also submit cancellation requests if for any reason they cannot fulfill the order.

Manage Deliverables

When buying companies implement Oracle Procurement Contracts, they may assign deliverables to purchase orders. Deliverables are tasks to complete to achieve a certain outcome or business objective. The supplier can use the deliverables information to track projects for compliance reasons and to reduce risk. Suppliers can view deliverables as well as update their status.

View agreements and purchase order revision history

Supplier agreements are purchase agreements suppliers have made with the buying company. On the Supplier Agreements page, suppliers can review details of agreements and the corresponding releases (orders) that have been created for a particular agreement.

Suppliers may also view purchase order revision histories. The Purchase Order Revision History page enables you to search for details on the revision history of a
purchase order. Using search criteria, suppliers can get a summarized list of revised purchase orders.

**Issue Work Confirmations**

For complex work agreements, suppliers can send work confirmations to notify buyers of the completion of a unit of work. Work confirmations can be referenced in invoices for billing purposes.

**Shipment Notices**

**Submit Advance Shipment and Advance Shipment Billing Notices**

Oracle iSupplier Portal enables suppliers to create both advance shipment notices and advance shipment billing notices that alert the buying company of upcoming shipments. Oracle iSupplier portal also allows the supplier to expedite receipts and payments for the buying company. Suppliers can create shipment notices online or use a spreadsheet to upload shipment notices.

**Inbound Logistics**

If buying companies are responsible for arranging the packaging and shipping of material, they may ask their suppliers to submit a routing request. A routing request notifies buyers when goods are ready for shipment. Suppliers may upload a routing request using spreadsheets.

On the **Routing Response** page, suppliers may search for and view details of routing responses (after a buyer has responded to them). When buying companies receive routing requests from suppliers, buying companies review and plan the optimum route. The system sends a response with shipping instructions and carrier details to the supplier, so that the supplier can view the response details on the **Routing Response** page.

**View Delivery Schedules and Overdue Receipts**

On the **Delivery Schedules Results** page, suppliers can determine deliveries that require scheduling or are past due.

On the **Overdue Receipts Results** page, suppliers can view the details of past-due purchase order shipments as well as receipts and returns. On the **Receipts Transactions** page, suppliers may also review a historical view of all receipts that have been recorded for their shipped goods.

**Invoices and Payments**
Invoice Information

If buying companies have implemented Oracle Payables, suppliers may submit invoices online based on purchase order lines that they have fulfilled. Suppliers can create invoices against open, approved, standard purchase orders, or blanket releases that are not fully billed. They can also enter a credit memo against a fully billed purchase order as well as invoice against multiple purchase orders.

On the Invoice Summary page, suppliers can view the history and status of all invoices from their buying company.

Manage Payment Information

Payment inquiry in Oracle iSupplier Portal enables suppliers to view the history of all the payments to the invoices that buying companies have completed.

Inventory Management

Manage Product Information

On the Product tab in Oracle iSupplier Portal, suppliers may easily access and view information about products the buying company provides. Using item numbers, suppliers may also view demand forecasts and various transactions. Suppliers can also maintain certain item information, such as manufacturing and order modifiers.

On-Hand Inventory

On the On-Hand Items page, suppliers can view their item inventory information. By viewing invoice items, suppliers can view on-hand item inventories, item locations, lots, and serials.

Vendor Managed Inventory

Vendor Managed inventory enables suppliers to manage the inventory at their customers’ location. Customers can set up the minimum and maximum stock levels required for an item enabled for maintenance by a supplier. Using Oracle iSupplier Portal, suppliers can view these minimum and maximum levels and also view the current on-hand quantities for that item at the customer location.

Consigned inventory

Oracle Procurement, along with Discrete Manufacturing supports maintaining consigned inventory for an item. Buying companies can enable items to have consigned inventory. Having consigned inventory enables the supplier to maintain the stock at the buying company location. Oracle iSupplier Portal enables suppliers to view on-hand stock for consigned items as well as associated procure-to-pay transactions.
**Supplier Management**

**Vendor and Supplier User Registration**

Suppliers register their companies as a prospective vendor in Oracle iSupplier Portal to let their buying companies know that they are interested in establishing a business relationship. After supplier companies are registered, additional supplier users within that company can be registered to access and use Oracle iSupplier Portal.

**Supplier Profile Management**

Supplier Profile Management enables suppliers to manage key profile details that establish or maintain a business relationship with their buying company. This profile information includes address information, names of main contacts, business classifications, banking details, purchasing and payables defaults, tax details, and category information about the goods and services suppliers provide to their buyers.

**Buying Company View**

**View Information as Internal (Buying Company) User**

The buying company user view in Oracle iSupplier Portal provides the same view of procure-to-pay transactions as the supplier view. Using the Internal User View responsibility in Oracle iSupplier Portal, a buying company user can view order, shipment, receipt, invoice, and payment information. Buying Companies may also search for information across all suppliers as well as respond to supplier change requests.

**Key Business Flows**

Key business flows for Oracle iSupplier Portal Include:

- Purchase Order Acknowledgement
- Create Advance Shipment Notice and Advanced Shipment Billing Notice
- Create Invoice

**Purchase Order Acknowledgement**

Figure 1-1 shows the complete Purchase Order Acknowledgement flow, from creation in Oracle Purchasing to possible actions in Oracle iSupplier Portal.
In Oracle Purchasing, the buyer creates the purchase order, and the process sends notification to the supplier. The supplier then acknowledges the purchase order, and optionally can reject shipments and make changes to a purchase order line or shipment. After making any optional changes, the supplier submits the acknowledgement. The buyer receives notification in Oracle Purchasing, and responds to the change request submitted during acknowledgement. The purchase order is revised automatically in Oracle Purchasing. The supplier receives notification of the revised purchase order and can view the revised purchase order in Oracle iSupplier Portal.
Create Advanced Shipment Notice or Advanced Shipment Billing Notice

Figure 1-2 shows the flow of ASN and ASBN creation and delivery.
Suppliers can use Oracle iSupplier Portal to create advanced shipment notices and advanced shipment billing notices (ASN/ASBNs) when a shipment is ready. The supplier enters line-level information (quantities, packing, number of containers, country of origin, etc.). If the item is lot or serial controlled, the supplier can choose to provide the lot and serial information for the shipment line. License Plate Numbers
(LPN) and LPN configuration details can also be provided. The supplier then enters the shipment notice header details (shipment number or shipment date). If the supplier is creating an ASBN, the supplier should enter billing details (invoice number, amount). Upon submission of ASN/ASBN, a notification is sent to the buyer. The buyer has to run the receiving transaction processor to import the ASN/ASBN to Oracle Purchasing.

**Create Invoice**

Figure 1-3 shows the flow of invoice creation and delivery.
To create an invoice, the supplier searches for and selects the purchase orders to invoice and clicks Add Items to Invoice List. The supplier then enters the quantity shipped, taxable status, and any additional changes. The supplier then enters the invoice number, date, and description. If the supplier would like to save the invoice and return to it later, they click Save For Later. If the supplier would like to submit the invoice, they click Submit Invoice.

**Integration with E-Business Suite Applications**
### Integrated Applications

<table>
<thead>
<tr>
<th>Application</th>
<th>Required?</th>
<th>Description</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Purchasing</td>
<td>Yes</td>
<td>Required to support the purchase order collaboration features in Oracle iSupplier Portal.</td>
<td>Oracle Purchasing User's Guide</td>
</tr>
<tr>
<td>Oracle Sourcing</td>
<td>No</td>
<td>Provides Supplier and Buyer collaboration data for POs, RFQs, and Contracts</td>
<td>Oracle Sourcing User's Guide</td>
</tr>
<tr>
<td>Oracle Procurement</td>
<td>No</td>
<td>Allows suppliers to utilize contract authoring functionality, including: submitting electronic signatures on documents, managing deliverables, viewing and printing articles, and submitting change requests to contract terms.</td>
<td>Oracle Procurement Contracts Implementation Guide</td>
</tr>
<tr>
<td>Oracle Services</td>
<td>No</td>
<td>Allows a streamlined process for sourcing, procuring and managing services including viewing details of service-related purchase orders, and viewing time cards.</td>
<td>N/A</td>
</tr>
<tr>
<td>Oracle Accounts Payable</td>
<td>No</td>
<td>Supports online submission of invoices in iSupplier Portal</td>
<td>Oracle Payables User's Guide</td>
</tr>
<tr>
<td>Application</td>
<td>Required?</td>
<td>Description</td>
<td>Reference</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------</td>
<td>--------------------------------------------------</td>
<td>------------------------------------------------</td>
</tr>
<tr>
<td>Oracle Quality</td>
<td>No</td>
<td>Allows suppliers to view and enter quality information</td>
<td>Oracle Quality User's Guide</td>
</tr>
<tr>
<td>Oracle WIP</td>
<td>No</td>
<td>Enables Work Order Functionality</td>
<td>Oracle Work in Process User's Guide</td>
</tr>
<tr>
<td>Oracle Manufacturing</td>
<td>No</td>
<td>Enables Work Order functionality</td>
<td>Oracle Enterprise Asset Management User's Guide</td>
</tr>
<tr>
<td>Oracle Supplier Scheduling</td>
<td>No</td>
<td>Enables forecast and shipment functionality</td>
<td>Oracle Supplier Scheduling User's Guide</td>
</tr>
</tbody>
</table>
This chapter covers the following topics:

- Implementation Prerequisites
- Responsibilities
- Setup Steps
- Assign Responsibilities to Internal Users
- Apply Securing Attributes
- Enable Function Security
- Enable Profile Options
- Enable E-Signature Functionality
- Enable Manage Deliverables Functionality

**Implementation Prerequisites**

The only implementation prerequisite for Oracle iSupplier Portal is that Oracle Purchasing has been licensed and fully implemented.

For detailed information on implementing Oracle Purchasing, see the Oracle Purchasing User's Guide.

**Responsibilities**

Oracle iSupplier Portal is shipped with the following seeded responsibilities:
<table>
<thead>
<tr>
<th>Responsibility Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>iSupplier Portal Full Access</td>
<td>Used to access supplier facing functionality for the business flows pertaining to Oracle Purchasing</td>
</tr>
<tr>
<td>Procure to Pay Supplier View</td>
<td>Used to access supplier facing functionality for the business flows pertaining to Oracle Purchasing</td>
</tr>
<tr>
<td>Plan to Pay Supplier View</td>
<td>Used to access supplier facing functionality for the business flows pertaining to Oracle Purchasing and Oracle Supply Chain Planning.</td>
</tr>
<tr>
<td>Source to Pay Supplier View</td>
<td>Used to access Supplier facing functionality for the business flows pertaining to Oracle Purchasing and Oracle Sourcing.</td>
</tr>
<tr>
<td>Supplier User Administrator</td>
<td>Used by buyer administrators to set up and maintain supplier user accounts</td>
</tr>
<tr>
<td>Supplier Profile Administrator</td>
<td>Used by buyer administrators to review prospective vendor registration requests and to administer supplier profiles.</td>
</tr>
<tr>
<td>Supplier Profile Manager</td>
<td>Used to give supplier users access to only their profile details</td>
</tr>
<tr>
<td>Source, Plan, Pay Supplier View</td>
<td>Used to access Supplier facing functionality for the business flows pertaining to Oracle Purchasing, Oracle Supply Chain Planning and Oracle Sourcing.</td>
</tr>
<tr>
<td>iSupplier Portal Internal View</td>
<td>Used by internal users of the buying company (including buyers) to access the functionality exposed by Oracle iSupplier Portal.</td>
</tr>
</tbody>
</table>

There is no separate setup step for assigning responsibilities to supplier users. Based on the options selected during the supplier registration process, the appropriate responsibilities are automatically assigned to the supplier user.

Internal (buying company) users must have the iSupplier Portal Internal View responsibility assigned to them.

For more information on assigning responsibilities to supplier users, see Chapter 3.
**Setup Steps**

You must complete the following setup steps to use the full range of features available in Oracle iSupplier Portal:

<table>
<thead>
<tr>
<th>Step</th>
<th>Required or Optional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign Responsibilities to Internal Users</td>
<td>Optional</td>
</tr>
<tr>
<td>Apply Securing Attributes to Custom Responsibilities</td>
<td>Optional</td>
</tr>
<tr>
<td>Enable Function Security</td>
<td>Optional</td>
</tr>
<tr>
<td>Enable Profile Options</td>
<td>Optional</td>
</tr>
<tr>
<td>Enable E-Signature Functionality</td>
<td>Optional</td>
</tr>
<tr>
<td>Enable Supplier Performance Monitoring</td>
<td>Optional</td>
</tr>
<tr>
<td>Enable Manage Deliverables Functionality</td>
<td>Optional</td>
</tr>
</tbody>
</table>

**Note:** Securing attributes are applied during supplier registration. For more information on supplier registration, see Chapter 3.

**Assign Responsibilities to Internal Users**

If you would like to utilize the internal user functionality of Oracle iSupplier Portal, you must assign the iSupplier Portal Internal View responsibility to users.

To assign the iSupplier Portal Internal View responsibility to users:

1. From the Oracle System Administrator menu, select Security > User > Define.
2. Enter the name of the user to whom you wish to grant the responsibility.
3. In the Direct Responsibilities section, enter iSupplier Portal Internal View in the Responsibility text box.
4. Click Save.
Apply Securing Attributes to Custom Responsibilities

If you have created custom responsibilities that will be assigned to supplier users, securing attributes must be included in your custom responsibility definition.

There are three securing attributes that can be used to control access. These attributes are all seeded with the pre-defined Oracle iSupplier Portal responsibilities that are released with the product:

- **ICX_SUPPLIER_ORG_ID** - Identifier for the supplier.
- **ICX_SUPPLIER_SITE_ID** - Identifier for the supplier site.
- **ICX_SUPPLIER_CONTACT_ID** - Identifier for the supplier contact.

**Note:** The securing attributes discussed in this section apply only to the supplier facing custom responsibilities. The Internal User View responsibility uses the document security setup done as part of Oracle Purchasing setup.

**Note:** No securing attribute setup is required for the iSupplier Portal Internal View responsibility.

To add the securing attributes to a custom responsibility:

1. From the Oracle System Administrator menu, select Security > Responsibility > Define.
2. In the responsibility form, search for the name of the custom responsibility you would like to modify.
3. In Securing Attributes region, search for the three securing attributes that have to be applied to this responsibility.
4. When you have identified all the attributes to apply to this responsibility, click Save.
The various securing attributes enable the supplier user access to be restricted as follows:

<table>
<thead>
<tr>
<th>Desired Access Restriction</th>
<th>ICX_SUPPLIER_ID</th>
<th>ICX_SUPPLIER_SITE_ID</th>
<th>ICX_SUPPLIER_CONTACT_ID</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limit user access to supplier specific information.</td>
<td>Responsibility defined with securing attribute.</td>
<td>N/A</td>
<td>N/A</td>
<td>Users who sign into the defined responsibility will only have access to the supplier information defined in the user definition.</td>
</tr>
</tbody>
</table>

The securing attribute on User definition is assigned the supplier_id value.
<table>
<thead>
<tr>
<th>Desired Access Restriction</th>
<th>ICX_SUPPLIER_ID</th>
<th>ICX_SUPPLIER_SITE_ID</th>
<th>ICX_SUPPLIER_CONTACT_ID</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Limit user access to information for specific supplier sites.</td>
<td>Responsibility defined with securing attribute</td>
<td>Responsibility defined with securing attribute</td>
<td>N/A</td>
<td>Users who sign into the defined responsibility will only have access to the supplier and site information defined in the user definition.</td>
</tr>
<tr>
<td>Limit user access to information from purchasing documents with a specific supplier contact defined.</td>
<td>Responsibility defined with securing attribute</td>
<td>Responsibility defined with securing attribute</td>
<td>Responsibility defined with securing attribute</td>
<td>Users who sign into the defined responsibility will only have access to purchasing documents that have the specific supplier contact defined.</td>
</tr>
</tbody>
</table>

### Enable Function Security

When a responsibility is first created, by default, access to all functions and standard pages is granted. Therefore, function security is assigned to exclude or restrict users from certain menus (tabs) or functions (sub-tabs).

In addition to limiting access to sets of pages whose associated functions or menus have been excluded, function security will also cause exclusion of associated regions and links for these functions on the Oracle iSupplier Portal Home page.

There are two types of function security exclusions:

- **Menu Exclusions** - used to prevent access to the main tabs (therefore the appropriate sub-tabs).

- **Function Exclusions** - used to prevent access to sub-tabs and other functionality.

Below is a list of menus, sub-menus and the available menu/function exclusion.

**Note:** The menus and functions listed in the tables below pertain to the
iSupplier Portal Full Access (Procure to Pay Supplier View) and iSupplier Portal Internal View responsibilities.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Sub Tab</th>
<th>Other Functionality</th>
<th>Function/Menu Exclusion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orders</td>
<td>N/A</td>
<td>N/A</td>
<td>Orders</td>
</tr>
<tr>
<td>Orders</td>
<td>Purchase Orders</td>
<td>N/A</td>
<td>Maintain Purchase Orders</td>
</tr>
<tr>
<td>Orders</td>
<td>Work Orders</td>
<td>N/A</td>
<td>Maintain Work Orders</td>
</tr>
<tr>
<td>Orders</td>
<td>Agreements</td>
<td>N/A</td>
<td>View Agreements</td>
</tr>
<tr>
<td>Orders</td>
<td>Purchase History</td>
<td>N/A</td>
<td>Purchase History</td>
</tr>
<tr>
<td>Orders</td>
<td>RFQ</td>
<td>N/A</td>
<td>RFQ</td>
</tr>
<tr>
<td>Orders</td>
<td>Deliverables</td>
<td>N/A</td>
<td>Manage Deliverables</td>
</tr>
<tr>
<td>Orders</td>
<td>Timecards</td>
<td>N/A</td>
<td>Timecards Search Page</td>
</tr>
<tr>
<td>Orders</td>
<td>N/A</td>
<td>Change Purchase Order</td>
<td>Change Purchase Order</td>
</tr>
<tr>
<td>Orders</td>
<td>N/A</td>
<td>Cancel Purchase Order</td>
<td>Cancel Purchase Order</td>
</tr>
<tr>
<td>Orders</td>
<td>N/A</td>
<td>Sign Purchase Order</td>
<td>Sign Purchase Order</td>
</tr>
<tr>
<td>Shipments</td>
<td>N/A</td>
<td>N/A</td>
<td>Shipments</td>
</tr>
<tr>
<td>Shipments</td>
<td>Delivery Schedules</td>
<td>N/A</td>
<td>Delivery Schedules</td>
</tr>
<tr>
<td>Shipments</td>
<td>Shipment Notices</td>
<td>N/A</td>
<td>View/Create ASN</td>
</tr>
<tr>
<td>Shipments</td>
<td>Shipment Schedules</td>
<td>N/A</td>
<td>Shipment Schedules</td>
</tr>
<tr>
<td>Tab</td>
<td>Sub Tab</td>
<td>Other Functionality</td>
<td>Function/Menu Exclusion</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------</td>
<td>---------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Shipments</td>
<td>Receipts</td>
<td>N/A</td>
<td>@@View Receipts</td>
</tr>
<tr>
<td>Shipments</td>
<td>Returns</td>
<td>N/A</td>
<td>Shipment Returns</td>
</tr>
<tr>
<td>Shipments</td>
<td>Overdue Receipts</td>
<td>N/A</td>
<td>Overdue Receipts</td>
</tr>
<tr>
<td>Shipments</td>
<td>On-Time Performance</td>
<td>N/A</td>
<td>Delivery Performance</td>
</tr>
<tr>
<td>Shipments</td>
<td>Quality</td>
<td>N/A</td>
<td>Quality</td>
</tr>
<tr>
<td>Shipments</td>
<td>N/A</td>
<td>Cancel ASN</td>
<td>Cancel ASN</td>
</tr>
<tr>
<td>Shipments</td>
<td>N/A</td>
<td>Create Routing Request</td>
<td>Create Routing Request</td>
</tr>
<tr>
<td>Shipments</td>
<td>N/A</td>
<td>View Routing Request</td>
<td>View Routing Request</td>
</tr>
<tr>
<td>Planning</td>
<td>N/A</td>
<td>N/A</td>
<td>ISP Planning</td>
</tr>
<tr>
<td>Planning</td>
<td>VMI</td>
<td>N/A</td>
<td>SCE Inbound Consigned Inventory Status</td>
</tr>
<tr>
<td>Planning</td>
<td>Forecast</td>
<td>N/A</td>
<td>Planning Schedules</td>
</tr>
<tr>
<td>Account</td>
<td>N/A</td>
<td>N/A</td>
<td>Account</td>
</tr>
<tr>
<td>Account</td>
<td>Create Invoices</td>
<td>N/A</td>
<td>Review Page</td>
</tr>
<tr>
<td>Account</td>
<td>View Invoices</td>
<td>N/A</td>
<td>Invoice Details</td>
</tr>
<tr>
<td>Account</td>
<td>View Payments</td>
<td>N/A</td>
<td>Payment Details</td>
</tr>
<tr>
<td>Product</td>
<td>N/A</td>
<td>N/A</td>
<td>Product Information</td>
</tr>
<tr>
<td>Product</td>
<td>Supplier Items</td>
<td>N/A</td>
<td>Supplier Item Summary</td>
</tr>
<tr>
<td>Tab</td>
<td>Sub Tab</td>
<td>Other Functionality</td>
<td>Function/Menu Exclusion</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------</td>
<td>---------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Product</td>
<td>Order Modifiers</td>
<td>N/A</td>
<td>Order Modifiers</td>
</tr>
<tr>
<td>Product</td>
<td>Maintain Capacity</td>
<td>N/A</td>
<td>Update Capacity</td>
</tr>
<tr>
<td>Product</td>
<td>Quality</td>
<td>N/A</td>
<td>Quality</td>
</tr>
<tr>
<td>Product</td>
<td>Consigned Inventory (menu)</td>
<td>N/A</td>
<td>Consigned Inventory (menu)</td>
</tr>
<tr>
<td>Orders</td>
<td>N/A</td>
<td>N/A</td>
<td>Orders Internal Information</td>
</tr>
<tr>
<td>Orders</td>
<td>Purchase Orders</td>
<td>N/A</td>
<td>Maintain Purchase Orders</td>
</tr>
<tr>
<td>Orders</td>
<td>Agreements</td>
<td>N/A</td>
<td>View Agreements</td>
</tr>
<tr>
<td>Orders</td>
<td>Purchase History</td>
<td>N/A</td>
<td>Purchase History</td>
</tr>
<tr>
<td>Orders</td>
<td>Pending Changes</td>
<td>N/A</td>
<td>Pending Change Requests</td>
</tr>
<tr>
<td>Shipments</td>
<td>N/A</td>
<td>N/A</td>
<td>Shipments Internal Information</td>
</tr>
<tr>
<td>Shipments</td>
<td>Shipment Notices</td>
<td>N/A</td>
<td>View ASN</td>
</tr>
<tr>
<td>Shipments</td>
<td>Receipts</td>
<td>N/A</td>
<td>@@View Receipts</td>
</tr>
<tr>
<td>Account</td>
<td>N/A</td>
<td>N/A</td>
<td>Account</td>
</tr>
<tr>
<td>Account</td>
<td>View Invoices</td>
<td>N/A</td>
<td>Invoice Details</td>
</tr>
<tr>
<td>Account</td>
<td>View Payments</td>
<td>N/A</td>
<td>Payment Details</td>
</tr>
</tbody>
</table>
When a particular sub-tab is excluded, access to that function is also restricted on the Oracle iSupplier Portal Home page. For example, applying the View-Create ASN function security exclusion will not only restrict users to the Shipment Notices page under the Shipment tab, it will also restrict users to the Shipments at a Glance view, ASN search capability, and the Shipment Notices hypertext from the process flow.

To add function security for a given menu or function:

1. From the Oracle System Administrator menu, select Security > Responsibility > Define.

2. Query the responsibility you are would like to restrict.

3. In the Function and Menu exclusions region, for the Type column, select Menu or Functionalistic depending on what you are excluding).

4. From the list of values available in the Function and Menu exclusions region, select the appropriate function or menu.

5. Click Save.

### Enable Profile Options

The following table explains profile options set by the system administrator that impact Oracle iSupplier Portal:

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RCV: Fail All ASN Lines if One Line Fails</td>
<td>No/Yes</td>
<td>Indicates whether the creation of ASN/ASBNs in Oracle Internet Supplier Portal will fail all ASN lines if one line fails.</td>
</tr>
<tr>
<td>Profile Option</td>
<td>Value</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------------</td>
<td>----------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>POS: Limit invoice to single PO</td>
<td>No/Yes</td>
<td>Indicates whether an Invoice created in Internet Supplier Portal will be limited to the shipments belonging to a single Purchase Order.</td>
</tr>
<tr>
<td>POS: Invoice Unit Price change for Quantity-Based</td>
<td>Allowable type of price</td>
<td></td>
</tr>
<tr>
<td>Matches</td>
<td>change.</td>
<td></td>
</tr>
<tr>
<td>POS: Allow Invoice Backdating</td>
<td>Yes/No</td>
<td>If the promise date is null, whether the promise date defaults to the need-by date after supplier's acknowledgement.</td>
</tr>
<tr>
<td>POS: Default Promise date acknowledgement</td>
<td>Yes/No</td>
<td></td>
</tr>
<tr>
<td>POS: OSN Hub</td>
<td>Hub name</td>
<td>Indicates whether E-Signature functionality has been enabled.</td>
</tr>
<tr>
<td>EDR: E-Records and E-Signatures</td>
<td>No/Yes</td>
<td></td>
</tr>
<tr>
<td>POS: ASL planning attribute updates from supplier</td>
<td>-Buyer’s Approval Required</td>
<td>Indicates the person whose approval is required when supplier submits changes via Order Modifiers and Maintain Capacity functionality.</td>
</tr>
<tr>
<td>approved by</td>
<td>Planner’s Approval Required</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No Approval Required</td>
<td></td>
</tr>
<tr>
<td>POS: ASN Shipment Display Period</td>
<td>Number of days</td>
<td>Controls how many sites can be created in the address approval flows in Supplier Profile Management.</td>
</tr>
<tr>
<td>Default load setting for number of sites allowed to</td>
<td></td>
<td></td>
</tr>
<tr>
<td>be created during address approval.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Enable E-Signature Functionality**

The following setup is required to enable use of the E-Signature functionality in Oracle.
iSupplier Portal:

1. Set the value of profile EDR: E-Records and E-Signatures to Yes.
2. Ensure that the function Sign Purchase Order is not excluded from the responsibility.

Enable Manage Deliverables Functionality

The following setup is required to enable use of manage deliverables functionality in Oracle iSupplier Portal

1. Ensure that the function “Manage Deliverables” is not excluded from the responsibility.
Implementing Supplier User Management

This chapter covers the following topics:

- Overview of Supplier User Management
- Implementing Supplier User Management
- Step 1: Flag External Responsibilities (Required)
- Step 2: Set Default Application Responsibilities (Required for Invitation)
- Step 3: Set the Web Server URLs (Required for Invitation)
- Step 4: Assign Supplier User Administrator Responsibility (Required)

Overview of Supplier User Management

Supplier User Registration

Before supplier users can access any of the collaboration network applications, a user account needs to be provided to them. Typically, user account creation is a function that system administrators perform, but the Supplier User Management feature allows designated users within the buying organization to create and manage external user accounts. These designated users can register new supplier user accounts and update user details to alter the supplier users profile and access rights.

Supplier User Management allows the buying teams to respond directly to the suppliers whom they are dealing with on a daily basis rather than having to process account requests through their IT department. Supplier User Management is only used to create and manage external accounts; it is not used to access and manage internal employee accounts.

The registration process within Supplier User Management is the only way supplier user accounts are created. This ensures that the supplier user’s account is designated as external and is directly linked to the supplier with whom the user is associated.

Supplier user accounts are only created for suppliers that are defined in the purchasing system.
The supplier user registration process is flexible and gives buyers control over the registration process. Ways buyers can register supplier users include:

- A Supplier User Administrator can invite the supplier user to register. The supplier user uses the URL included in the invitation notification to access the registration page and complete the registration form. The Supplier User Administrator who initially sent the registration invitation receives a notification that the supplier user has completed the registration form. The Supplier User Administrator then either approve or reject the registration request. If approved, the supplier user can start accessing the collaboration network applications.

- If Sourcing Buyers know the supplier user’s e-mail address, buyers can invite unregistered suppliers while creating negotiations. When a negotiation is published, the invited supplier users receive notifications containing a URL with details about the negotiation and a URL pointing to the registration page. When the supplier users have completed and submitted the registration request, the Sourcing Buyer receives a notification. The Sourcing Buyer can then approve or reject the registration requests.

- If a Sourcing buyer has the required authorizations and knows the required information about both the company and a contact at the company, the buyer can invite the contact to register both the company and himself. The Sourcing buyer adds the company and the contact to the invitation list for the sourcing event. When the negotiation is published, a notification is sent to the contact including the URL of the Registration page. Once the registration request is completed, a Supplier Profile Administrator can view and approve it. This approves both the company and the supplier user who was the contact.

- If Supplier User Administrators know all the required information, they can register supplier users directly. A notification is sent to the new supplier user containing the URL for the buying company’s home page, the supplier users login, and system generated password (the user will be prompted to change the password upon first access).

- After their registration requests are approved by the buying organization, supplier users have access to whichever applications that the buying organization has granted them access.

Regardless of how the registration request was created, it must be authorized by an approver at the buyer company. Once approved, the supplier user has access to the applications granted by the approver.
### Supplier User Registration Flow

<table>
<thead>
<tr>
<th>Buyer Actions</th>
<th>Supplier User Actions</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Supplier User Administrator sends registration invitation to supplier user.</td>
<td>N/A</td>
<td>E-mail notification is sent to supplier user containing the URL for the registration page, an initial userID and system generated password.</td>
</tr>
<tr>
<td>or</td>
<td></td>
<td>or</td>
</tr>
<tr>
<td>Sourcing Buyer sends registration invitation to supplier user.</td>
<td></td>
<td>E-mail notification is sent containing the URL for the registration page as well as details on the sourcing event.</td>
</tr>
<tr>
<td>or</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sourcing Buyer invites supplier user to register during sourcing event.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>or</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Authorized Sourcing buyer includes unregistered company/contact in Sourcing event (see Note below)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>or</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplier User Administrator fully registers supplier user.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Supplier user accesses the URL included in the notification, completes the registration page, and then submits the registration request.</td>
<td>N/A</td>
<td>E-mail notification is sent to Supplier User Administrator or Sourcing Buyer indicating the registration request needs approving.</td>
</tr>
<tr>
<td>3. Supplier User Administrator or Sourcing Buyer approves or rejects the registration request.</td>
<td>N/A</td>
<td>Notification is sent to supplier user indicating registration status.</td>
</tr>
</tbody>
</table>

*Note: authorized Sourcing buyers can both register and approve companies/contacts when creating sourcing events.*
Buyer Actions | Supplier User Actions | Comments
--- | --- | ---
N/A | 4. Supplier user begins accessing collaboration network applications. | N/A

**Supplier User Profiles**

When supplier users register with the system, they provide information to create their own profiles. Buyers having the Supplier User Administrator responsibility can both update supplier user profiles and make changes to the users access rights. A supplier profile includes both the responsibilities the supplier users can access and any securing attributes associated with those responsibilities.

**Implementing Supplier User Management**

To implement supplier user registration:

1. **Flag External Responsibilities (Required).**

2. **Set Default Application Responsibilities (Required for Invitations).**

3. **Set Up Web Server URLs (Required for Invitations).**

4. **Create Customized Responsibilities for Supplier User Administrators (Optional).**

5. **Assign Responsibilities to Buyer Administrators of Supplier Users (Required).**

**Step 1: Flag External Responsibilities (Required)**

When you create your supplier user accounts, you must select the responsibilities to which that user is granted access. For a responsibility to be available for granting through Supplier User Management, it must be flagged as an external responsibility. External Responsibilities appear on the Approve/Reject Supplier User page. From this list, the buyer administrator selects the applications to grant to the new supplier user.

To flag external responsibilities:

1. Access the System Administrator responsibility.

2. Select Profile, then System.

3. On the Find System Profile Values form, deselect the Site check box, select the Responsibility check box, and enter the name of the responsibility that you want to flag as external (clicking the ellipses at the end of the field places you in a search
Implementing Supplier User Management

window where you can search for the responsibility name). The following example shows the Supply Chain Collaboration Manager responsibility.

**Find System Profile Values Form**

4. In the Profile field, enter POS: External Responsibility Flag.

5. Click Find.

**Profile Field**

6. When the System Profile Values form opens, you see an open field at the intersection of the row for the profile option POS: External Responsibility Flag and
the column for the responsibility that you chose.

**System Profile Values Form**

7. At the intersection of the appropriate Profile row and the Responsibility column, click the field and select Yes to flag this responsibility to be externally grantable, or No to keep this responsibility internal only.

8. Save your work.

9. Continue flagging any additional responsibilities by querying up the responsibility definition and setting the POS:External Responsibility Flag to Yes.

See *Oracle Applications System Administration Guide* for instructions on setting system profile options.

**Step 2: Set Default Application Responsibilities (Required for Invitation)**

To simplify the registration process, you can set a default responsibility for each collaboration suite application. Then, when Sourcing Buyers or Supplier User Administrators invite supplier users to register, administrators can specify in advance the applications to be granted to each user.

At approval time (after the supplier user has completed and submitted the registration request), the default responsibilities associated with the applications that were previously selected appear on the approval page. The approver can accept these default responsibility selections or modify them as needed. The defaults are deselected and/or additional external responsibilities are granted. Note that default responsibilities must be flagged as external responsibilities.

To define default responsibilities:

1. Access the System Administrator responsibility.

2. Select Profile, then System.
3. On the Find System Profile Values form, enter one of the following in the Profile search field:
   - Sourcing Default Responsibility.
   - iSP Default Responsibility for External User.
   - Collaborative Planning Responsibility.

4. For each profile, define a default responsibility. Typical defaults include:
   - Sourcing Supplier for Sourcing Default Responsibility.
   - Supplier Portal Full Access for iSP Default Responsibility for External User.
   - Supply Chain Collaboration Planner for Collaborative Planning Responsibility.

See Oracle Applications System Administration Guide for instructions on setting system profile options.

**Step 3: Set the Web Server URLs (Required for Invitation)**

To ensure that supplier users can register, log into the system, and receive notifications, you must set up the necessary server URL addresses.

1. Access the System Administrator responsibility.

2. Select Profile, then System. On the Find System Profile Values form, enter POS% in the Profile field, and click Find (POS is the product shortcode for Oracle iSupplier Portal).

3. The System Profile Values form shows all profiles beginning with POS.
   - Set the **POS: External URL** to http or https://<external web server machine>:<port>
     
     For example: http://external.oracle.com:10333 or https://external.oracle.com:23423

     If the customer still wishes to use PHP related login pages and navigation then the **POS: External URL** should be of the format: http or https://<ServerName>:<PortNo>/pls/<DADName> Example: http://external.oracle.com:2222/pls/simpledad

   - Set the **POS: Internal URL** to http or https://<internal web server machine>:<port>

4. Return to the Find System Profile Values form. Deselect the Site check box and
select the Responsibility check box.

**Note:** Steps 5 through 9 do not apply if you have changed the hierarchy type of the Application Framework Agent profile option to Server. The steps are only applicable if you have changed the hierarchy type of the Application Framework Agent profile option to Security.

5. In the Responsibility search field, enter POS: Supplier Guest User.

6. In the Profile field, enter Application Framework Agent.

7. Click Find.

8. When the System Profile Values form displays, set the POS: Supplier Guest User responsibility level to the external web server value: http or https://<external web server machine>:<web port>

See *Oracle Applications System Administrator’s Guide* for instructions on setting system profile options.

**Step 4: Assign Supplier User Administrator Responsibility (Required)**

All buyers in charge of managing supplier users are assigned the Supplier User Administration responsibility. Your purchasing organization can identify the users who are involved with your company’s supply base management.

See *Oracle Applications System Administrator’s Guide* for instructions on assigning responsibilities.
Implementing Flexible Prospective Supplier Registration (and Profile Management)

This chapter covers the following topics:

• Prospective Supplier Registration, Supplier Profiles, and Management Groups
• Implementing Prospective Supplier Registration and Profile Management
• Implementing Supplier Management Groups (Optional)
• Step 1: Plan Your Supplier Management Groups (Required)
• Step 2: Create Your Supplier Management Groups (Required)
• Step 3: Create Customized Responsibilities for Buyer Approvers (Required)
• Step 4: Assign Customized Responsibilities to Users (Required)
• Implementing Prospective Vendor Registration (Optional)
• Step 1: Install FPI Patchset (Required)
• Step 2: Set Default Application Responsibilities (Required)
• Step 3: Create Striped Registration Page Links (Required)
• Step 4: Define Notification Subscriptions (Optional)
• Step 5: Customize Supplier Onboarding Information (Optional)
• Step 6: Implement Supplier Approval (Optional)
• Implementing Supplier Profile Management (Optional)
• Step 1: Install FPI Patchset (Required)
• Step 2: Define Business Classifications List of Values (Required)
• Step 3: Set Up the Products and Services Classifications (Required)
• Step 4: Create Address Books for Existing Suppliers (Required)
• Step 5: Create the Contact Directory for Existing Suppliers (Required)
Prospective Supplier Registration, Supplier Profiles, and Management Groups

Prospective Supplier Registration and Supplier Profile Management ease the administrative burden faced by trading partners conducting business.

New suppliers can register with the buying organization to indicate their interest in establishing a business relationship. Suppliers are also able to access and update a profile of key company details online. This information is used by buyers to directly modify supply base information in their purchasing and payables system. Modifying supply base information results in a significant reduction in the volume of forms and direct contact between the two organizations.

Prospective Supplier Registration

The Prospective Supplier Registration feature allows buyer organizations to accept unsolicited registration requests through their own Web page from suppliers with whom the company has not previously conducted business. This self-service registration process provides prospective suppliers with a Web page where suppliers can complete a simple registration form and then submit it for approval by administrators at the buying company. After a buyer administrator approves the supplier’s registration request and information on the supplier is added to the buying company’s purchasing and payables system, supplier user accounts for that supplier can be created and the supplier users can begin accessing and using the applications.

<table>
<thead>
<tr>
<th>Prospective Vendor Registration Flow</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Buyer Actions</strong></td>
</tr>
<tr>
<td>N/A</td>
</tr>
<tr>
<td>N/A</td>
</tr>
<tr>
<td>3. Buyer Administrator approves or rejects the supplier registration request.</td>
</tr>
<tr>
<td>Buyer Actions</td>
</tr>
<tr>
<td>---------------</td>
</tr>
<tr>
<td>4. If approved, prospective supplier is created, and a user account is set up for user who registered the company.</td>
</tr>
</tbody>
</table>

**Supplier Profiles**

After a supplier company’s registration request is approved by a buyer administrator, a company profile is created for that supplier from the information supplied with the registration request. These profiles can then be expanded to include other details about the company. Supplier profiles contain company information such as tax IDs, Dun and Broadcaster numbers, supplier addresses and contact names, descriptions of goods and services provided by the supplier, classification details such as ownership status (for example, minority-owned) and bank account details. They also include many defaults for processing orders, payments, and shipments.

Suppliers maintain the information and update it as needed. Suppliers have the responsibility for ensuring the information about their company is current and correct.

Buyer administrators can access and, if necessary, maintain the information contained in a supplier's company profile. As appropriate, buyer administrators use this information to update the purchasing and payables system with any new details that a supplier provides. For example, a supplier may add new addresses or contact information. Buyer administrators can view this new information and use it to update any corresponding site or site contact information in the purchasing and payables system that is no longer current. See the following chapter, Supplier and Supplier User Administration for information on defining and maintaining supplier profiles.

Through the use of Supplier Management Groups, you can divide the responsibility for maintaining supplier information among several buyer administrators. See Implementing Supplier Profile Management (Optional), page 4-22 later in this chapter for more details on Supplier Management Groups.

New suppliers typically create their own profiles after they are registered. However, if you are implementing supplier profile management, and you have suppliers that already exist in your purchasing and payables system, you can use their existing details to create their profile rather than have the supplier re-enter all the information.
### Supplier Profile Creation Flow - New Supplier

<table>
<thead>
<tr>
<th>Buyer Actions</th>
<th>Supplier Actions</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>1. Supplier accesses self-service registration website, completes and submits registration form.</td>
<td>Notification of registration request is sent to buyer administrator(s). Registration request also appears as &quot;Pending Approval&quot; on the Pending Supplier Registration pages.</td>
</tr>
<tr>
<td>2. Buyer administrator views registration request and approves or rejects the request.</td>
<td>N/A</td>
<td>If approved, a supplier record and user account is created for the requester from the supplier. The requestor is then assigned the default responsibility for newly registered user. Notification is sent to supplier with request status.</td>
</tr>
<tr>
<td>3. Buyer administrator assigns new user Supplier Profile Manager responsibility</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>N/A</td>
<td>4. Supplier user can begin creating supplier profile.</td>
<td>Supplier specifies company summary information, defines an address book and a contact directory, adds bank account details, and declares any appropriate business classifications or certifications (for example, minority-owned status). The supplier also identifies the goods and services the company can provide.</td>
</tr>
</tbody>
</table>
### Supplier Profile Creation Flow - Existing Supplier

<table>
<thead>
<tr>
<th>Buyer Actions</th>
<th>Supplier Action</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Buyer administrator accesses the information for the existing supplier.</td>
<td>N/A</td>
<td>Supplier information must already exist in the purchasing and payables system.</td>
</tr>
<tr>
<td></td>
<td>N/A</td>
<td>A supplier profile should be created by buyer administrators before any suppliers are granted the Supplier Profile Manager responsibility (Step 4).</td>
</tr>
<tr>
<td>2. Buyer administrator uses existing supplier site information to create entries in the supplier’s Address Book.</td>
<td>N/A</td>
<td>Supplier site information from purchasing and payables system is used to create address name and address detail entries in the Address Book.</td>
</tr>
<tr>
<td>3. Buyer administrator uses existing site contact information to create entries in the supplier Contact Directory.</td>
<td>N/A</td>
<td>Information is obtained from supplier contacts defined in purchasing and payables system. Contacts can be associated with additional addresses if needed.</td>
</tr>
<tr>
<td>4. Buyer administrator (that has been granted Supplier User Administrator responsibility) uses bank account site assignment information to create bank account address assignments.</td>
<td>N/A</td>
<td>Approved bank accounts automatically appear in the bank accounts window. A concurrent program must be run to migrate the account site assignments details.</td>
</tr>
<tr>
<td>5. Buyer administrator grants authorized supplier users the Supplier Profile Manager responsibility.</td>
<td>N/A</td>
<td></td>
</tr>
<tr>
<td>Buyer Actions</td>
<td>Supplier Action</td>
<td>Comments</td>
</tr>
<tr>
<td>---------------</td>
<td>----------------</td>
<td>----------</td>
</tr>
<tr>
<td>7. Supplier users update company profile information when needed.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Buyer administrator(s) view updated information and decide whether to update the information in their purchasing and payables system.</td>
<td>Any new address information provided by a supplier is used to update supplier site records in the purchasing and payables system.</td>
<td>New contact information is used to update supplier contact records.</td>
</tr>
</tbody>
</table>

**Supplier Management Groups**

Companies frequently segregate their business operations to ensure effective management. These segregations are done by geography or line of business, or be established for administrative or legal reasons. For example, a manufacturer might have several production departments, only one of which deals with distributors in Europe. Or, a financial services company might have a separate division for each type of consulting service that it offers. These operational organizations are called operating units. While business may be divided into multiple operating units, the management and administration of the supply base may be organized into groups of operating units.

Supplier Management Groups allow you to combine one or more operating units into a single management group for the purpose of administering supplier accounts. Multiple buyer administrators can be assigned to each Supplier Management Group, enabling the supplier administration workload to be balanced among several different buyer administrators, with each administrator being responsible for maintaining only a subset of the buying organization's total operating unit information.

Operating units are typically distinguished from one another by, among other things, the supplier sites and the supplier contacts with which the buying personnel for that operating unit interact.

Suppliers can add or update their company information (for example, they open a new office and therefore add a new address). When suppliers do this, buyer administrators decide whether to use the new information to update the existing purchasing and payables system information for the operating units they administer. This way, buyer administrators can use supplier information to keep their operating unit information up to date. Buyer administrators can view all supplier information, but they can only update operating units that belong to their supplier management group.

When creating supplier management groups, you select which operating units comprise the group, so the make up of the different supplier management groups should be
Implementing Flexible Prospective Supplier Registration (and Profile Management)

It is possible that more than one team of administrators could be maintaining the supplier details for the same operating unit, and therefore this operating unit could potentially be included in more than one supplier management group. However, use of such overlapping supplier management groups is not recommended.

The following example shows a typical buying organization divided into a number of operating units. Different operating units deal with particular parts of the pan-European supplier Industrial Hydraulics, Ltd. Thus, two supplier management groups have been defined so that the relevant details about Industrial Hydraulics can be updated into the appropriate operating units. One contains the headquarters site and the other contains both the London, Frankfurt, and Paris sites.

Implementing Prospective Supplier Registration and Profile Management

This section provides the following topics:

- Implementing Supplier Management Groups (Optional)
- Implementing Prospective Supplier Registration (Optional)

Implementing Supplier Management Groups (Optional)

Supplier management groups are defined in terms of a buying organization's operating units. Each supplier management group is maintained by one or more buyer administrators. Supplier management groups allow buyer administrators to use
supplier profile information for mass updates to all the operating units that they administer. Using supplier management groups allows you to control which operating units a particular buyer administrator can maintain.

To implement supplier management groups:

1. Plan Your Supplier Management Groups (Required).
2. Create Your Supplier Management Group (Required).
3. Create and Assign Customized Responsibilities for Buyer Approvers (Required).
4. Assign Customized Responsibilities to Users (Required).

**Step 1: Plan Your Supplier Management Groups (Required)**

The purpose of supplier management groups is to allow buyer administrators to view supplier information and, where appropriate, use that information to update the operating units they administer.

Each supplier management group consists of one or more operating units. How you allocate your company’s operating units among your supplier management groups is a design decision that you would base on the business practices that your company uses to maintain its supply base.

For example, company A has a centralized control center for all its suppliers and has a single supplier management group that contains all operating units for the company. Company B, however, distributes control over suppliers regionally and so has multiple supplier management groups, each containing only the operating units appropriate for that region.

In some cases, the same operating unit may be contained in multiple supplier management groups. This is not recommended, however, since it can lead to confusion between the overlapping groups. The confusion being whether an update to a supplier’s profile has been applied to each of the supplier management groups’ operating units within the purchasing and payables system.

Before defining your supplier management groups you should:

- Identify all the operating units that are within your enterprise and decide which ones will participate in a supplier management group.
- Determine how to divide up your operating units and compile lists of units for each group.
- Determine a unique name for each management group that you create.
- Determine the unique name for each customized responsibility that you create to access each supplier management group.
• Identify the buyer administrators for each supplier management group.

Use the information that you gather to implement your supplier management groups as detailed in the instructions in the subsequent steps.

Step 2: Create Your Supplier Management Groups (Required)

Supplier management groups are collections of operating units that are grouped together to provide easy administration of supplier information. Each Supplier Management Group is defined using the HR Security Profile.

To create Supplier Management Groups defined by Operating Unit:

1. Access the Super HRMS Manager responsibility.

2. Select Security and then Global Profile.

3. On the Global Security Profile form, enter a name. This is the unique name for your supplier management group that you identified during your planning phase.

4. Verify the Employee, View Contingent Workers, and View Applicants fields are set to None, and the View Contacts field is set to Restricted.

5. On the Organization Security tab, select Secure organizations by organization hierarchy and/or organization list as Security Type.
6. Use the multi-row table to specify all the operating units that comprise this supplier management group. These can be from multiple business groups.
   - Enter Operating Unit as the Classification.
   - Select the operating unit from the Organizations menu.

7. Continue until you have defined all the operating units for this group.

8. Save your work.

9. After all of the required security profiles are defined, run the Security List Maintenance concurrent program with the appropriate Request Parameters. Where there are no other security profiles in the system, the Generate Lists parameter should be set to All Global Profiles.

To create Supplier Management Groups defined by Business Group:

If your supplier profile management assignments mirror your business group structure, you can create security profiles associated with business groups and then assign the security profile to the appropriate responsibility.

1. Access the Human Resources responsibility.

2. Select Security, then Define Security Profile, then Security Profile

3. Select a business group and continue creating your security profile.

4. Save your work.

5. After all of the required security profiles are defined, run the Security List Maintenance concurrent program with the appropriate Request Parameters. Where there are no other security profiles in the system, the Generate Lists parameter should be set to All Global Profiles.

See the Implementing Oracle HRMS manual for information on security profiles.

Within each supplier management group, only those operating units that have financials, payables, purchasing, and receivables setup are utilized. The system ignores any operating units in the group that do not have these options setup, and will not promote any of the supplier’s profile details to these operating units.

**Step 3: Create Customized Responsibilities for Buyer Approvers (Required)**

There can only be a single supplier management group associated with a specific responsibility. Thus, you must create a customized responsibility for each separate
supplier management group.

Use the Supplier Profile Administration responsibility as the model for each of these customized responsibilities. After you have created your responsibilities, you assign them to the appropriate buyers. These buyers can then approve registration requests as well as maintain supplier profiles.

You can assign the same supplier management group to multiple responsibilities.

To create a customized responsibility:

1. Access the System Administrator responsibility.

2. Select Security, then Responsibility, then Define.

3. On the Responsibilities form:
   - Enter a name for your new responsibility (for example, Supplier Profile Administrator - Western Region).
   - Enter a unique ID for your new responsibility.
   - Enter Oracle Internet Supplier Portal as the Application.
   - Enter Standard as the Data Group.
   - Enter Oracle Internet Supplier Portal as the Data Group application.
   - Enter Supplier Management as the Menu value.
   - In the Available From section, ensure Oracle SSWA is selected.
   - When you finish entering your responsibility definition, your form should look similar to Figure 4-2.
4. Save your work.

5. Return to the Responsibility navigator.

6. Select Profile, then System.
7. On the Find System Profile Values form, enter **HR: Security Profile** (or just **HR: Sec%**)) in the Profile search field. Click Find.

8. The System Profile Values form shows the default site value for **HR:Security Profile**. If there is no value, search for and select a Security Profile for the site default.

**Note:** If you do not set a default site level for **HR: Security Profile**
and a user is given a responsibility that is not associated with a security profile, the user has administrative access to all operating units in the company.

9. To assign a security profile to a particular responsibility, return to the Find System Profile Values form. Keep **HR: Security Profile** in the Profile search field.

![Find System Profiles Page](image)

10. Select the Responsibility checkbox. In the Responsibility search field query up the responsibility to which you want to assign a security profile. Click Find.

11. When the System Profile Values form displays, an unprotected field at the intersection of the Profile row and the Responsibility column appears. Click that field and search for the supplier management group that you want to assign to the responsibility.

12. When you have assigned the correct supplier management group to this responsibility, save your work.

See the *Oracle Applications System Administration Guide* for instructions on setting system profile options.
Step 4: Assign Customized Responsibilities to Users (Required)

After you have created the required responsibilities and assigned them their appropriate security profiles, you must assign the appropriate responsibilities to your buyer administrators or approvers. A buyer administrator can assign multiple responsibilities (and can therefore administer multiple supplier management groups) and multiple administrators can share the same responsibility (and therefore manage the same supplier management group).

See the *Oracle Applications System Administration Guide* for instructions on assigning responsibilities to user.

Implementing Prospective Vendor Registration (Optional)

The Prospective Vendor Registration feature allows a buying organization to establish links from its own websites to a registration page where suppliers can register their primary company details. The Prospective Vendor Registration feature provides the flexibility to allow multiple business groups within the buying organization to accept and process separate registration requests.

**Prospective Vendor Registration Flow**

<table>
<thead>
<tr>
<th>Buyer Actions</th>
<th>Supplier Actions</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>1. Supplier user clicks registration link on buyer’s web site.</td>
<td>Registration link contains encrypted ID and associates the user with a particular operating unit.</td>
</tr>
<tr>
<td>N/A</td>
<td>2. Supplier fills out and submits registration page.</td>
<td>E-mail notification is sent requesting registration approval. The request is viewable in the system in pending status. Any buyer administrator whose supplier management group includes the operating unit encrypted in the link to the registration page used by the supplier receives a notification of the request. There is no hierarchy of approvers.</td>
</tr>
</tbody>
</table>
Buyer Actions | Supplier Actions | Comment
--- | --- | ---
3. Buyer Administrator whose supplier management group includes the operating unit approves or rejects the supplier registration request. | N/A | E-mail notification is sent to supplier user who submitted the supplier registration request with request status.

4. If approved, prospective supplier is created, and a user account is set up for user who registered the company. | N/A | User is assigned external user default responsibility.

The registration process automatically:

- Uses the address name provided in the registration request information to create a supplier site.

- Uses the address details to create the site details.

- Validates the information supplied against existing supplier information to prevent duplication of information. If duplicate information is found, a rejection notification is sent to the user who submitted the registration request.

- Creates a user account for the person submitting the registration request. An approval notification including a temporary password is sent to the supplier user who submitted the registration request.

- Uses the customized registration link to associate the supplier company with one of the buyer's operating units (and by extension with each supplier management group that includes the operating unit).

To implement the Self-Service Registration feature you must:

1. Install the FPI Patchset.

2. Set the default application responsibilities to be automatically assigned to new supplier users.

3. Create Striped Registration Page Links.

**Step 1: Install FPI Patchset (Required)**

To implement the Prospective Vendor Registration feature, you must first apply the TCA and HR patches for FPI.
Step 2: Set Default Application Responsibilities (Required)

To simplify the registration process, you can set a default responsibility for each collaboration suite application. Then when Sourcing Buyers or Supplier User Administrators invite supplier users to register, they can pre-select the applications to be granted to each user.

At approval time (once the supplier user has completed and submitted the registration request) the default responsibilities associated with the applications that were previously selected appear on the approval page. The approver can accept these default responsibility selections or modify them as needed. The defaults can be deselected and/or additional external responsibilities can be granted. Note that default responsibilities must be flagged as external responsibilities using the instructions in the previous step.

To define default responsibilities:

1. Access the System Administrator responsibility.
2. Select Profile, then System.
3. On the Find System Profile Values form, enter one of the following in the Profile search field:
   - Sourcing Default Responsibility.
   - iSP Default Responsibility for External User.
   - Collaborative Planning Responsibility.
4. For each profile, define a default responsibility. Typical defaults include:
   - Sourcing Supplier for Sourcing Default Responsibility.
   - Supplier Portal Full Access for iSP Default Responsibility for External User.
   - Supply Chain Collaboration Planner for Collaborative Planning Responsibility.

See Oracle Applications System Administration Guide for instructions on setting system profile options.

Step 3: Create Striped Registration Page Links (Required)

The buying organization may want to associate its registered suppliers with different organizations that are within the company. Typically, this occurs because different parts of the business attract distinct types of suppliers (for example, metal processing for the
manufacturing division versus contract services for the consulting division). Such divisions are achieved by creating multiple registration page links from the buying organization's website. Each link contains a reference to a particular operating unit, and the supplier who uses that link when registering is associated with that operating unit. By using striped registration page links, the buying organization, through the registration process itself, can control the association of an operating unit with a supplier.

To create registration page links striped by operating unit:

2. Select Setup: Profile Management Configuration, then Organization Encryption.

3. On the Supplier Registration Setup page, select the operating units to be encrypted.
4. Click Encrypt.
5. The encryption string for that operating unit is displayed.
6. Create customized hyperlinks from the home page to the registration page. There should be one hyperlink for each encrypted operating unit ID. The hyperlink format is: 

   `<A HREF= "http or https: //host:port/OA_HTML/jsp/pos/ suppreg/SupplierRegister.jsp?ouid=<encrypted operating unit ID>">registration link text</A>`
Step 4: Define Notification Subscriptions (Optional)

You may wish to group your supplier profile administrators into groups, one group handling certain change requests, and another handling different change requests. You can control the notifications your administrators receive by setting their notifications subscriptions. For example, if you have an administrator who handles only bank account updates, you can set the system so that this administrator only receives notifications for bank account update.

To view existing subscription definitions:
1. Sign on with the Purchasing Super User responsibility
2. Setup > Profile Management Configuration > Setup Notification Subscription.
3. On the Setup SPM Notification Subscription page, you can
   - Search for all subscribers to a particular notification type.
   - Search for all notifications received by a particular employee. You can search by first name, last name, userid, or email address for that person.

   To define the notifications subscriptions for a particular user:
4. On the Setup SPM Notification Subscription page, click Add Subscriptions. Enter or select the user’s first name/last name, userid, or email address (users must have an email address defined to receive notifications). Click Go.

5. Enter the user’s first name, last name, employee number or email address.

6. On the resulting employee display, select the employee and the appropriate notifications. Do not select any notifications already authorized for the user.

7. Click Apply.

**Step 5: Customize Supplier Onboarding Information (Optional)**

To enable better assessment of supplier registration requests, you can set the registration process to include requests to the supplier for additional profile information. This allows you to better pre-screen prospective suppliers prior to approving them.

You can solicit this information by expanding the Supplier Registration page to create sections that solicit additional information for the company attributes such as address, contact, and/or bank account information. If these sections are included in the Suppliers Registration page, suppliers must enter information for their registration request to be considered complete.

These extra sections can include buyer-defined surveys. If a survey is included on the
registration page, the survey must be completed as well.
You can create a global registrations page or customize registration pages by operating unit.

**To create a customized registration page:**

1. Sign on with the Purchasing Super User responsibility.
2. Setup: Profile Management Configuration > Supplier Onboarding.

### Supplier Onboarding Configuration Page

<table>
<thead>
<tr>
<th>Supplier Onboarding Configuration</th>
<th>Cancel</th>
<th>Apply</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Indicators required field</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scope: Global</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Global Configuration Profile**
  - **Standard Profile**
    - **Profile Section**
      - **View and Update By Supplier Users**
      - **View and Update By Internal Users**
    - **Address Book**
    - **Contact Directory**
    - **Business Classifications**
    - **Product & Services**
    - **Banking Details**
  - **Surveys**
    - **Title**
    - **View and Update By Supplier Users**
    - **View and Update By Buyer Users**
    - **Remove**

3. On the **Supplier Onboarding Configuration** page, the Scope defaults to Global.
4. You can define a Global registration page or select Operating Unit from the Scope menu.
   1. If you select Scope, a new Operating Unit field appears.
   2. Enter a partial or full operating unit name and click Go.
   3. Select the operating unit for which you wish to define the registration page.
5. Specify which sections appear on the Registration page.
6. If you wish to attach a survey to the page, click Add Another Row, browse for the survey.
7. When finished, click Apply.
Step 6: Implement Supplier Approval (Optional)

Tracking the formal approval of each new supplier request is traditionally a manual process that requires coordination across multiple departments as credit checks are carried out, customer references called, quality standards reviewed and production facilities inspected.

iSupplier Portal uses supplier approval management to allow companies to generate customized approval flows for processing supplier requests and registration. The details of the request can be passed to multiple stakeholders across many departments within the buying organization. Approvers will be notified when they are required to review a request and can graphically check the overall approval status for a given request.

Implementing Supplier Profile Management (Optional)

By using Supplier Profile Management, buying organizations can allow suppliers to enter and maintain information on their company. This enables the supplier to be responsible for adding new information and ensuring that existing information is up to date. Through profile management, suppliers can provide the buying organization with key details about their company, such as location and contact information, major business classifications, banking details, and category information about the goods and services that they provide. Allowing suppliers to enter and update this information eases the administrative burden of maintaining the business relationship information between the buyer and supplier companies.

Supplier profiles consist of:

- Supplier Summary Information
- Supplier Address Book
- Supplier Contact Directory
- Business Classification/Certification Information
- Product and Services Listing
- Supplier Bank Account Details

As suppliers enter new information or change existing information, buyer administrators are notified of the changes, and the status of the profile information is updated. Buyer administrators can review the changes and use the changes to the Address Book, the Contact Directory, and the Bank Account details to update the corresponding information in the purchasing and payables systems. When using details of the supplier's profile to update the purchasing and payables system, updates are only applied to the operating units in the supplier management group administered by the
buyer administrator. Supplier address book details are used to create and update site records in the purchasing and payables system. Contact Directory entries are used to create or update site contact records. Bank Account details are used to update the payables system as well as site assignment information.

For addresses and contacts, the update process creates links between the supplier’s profile and the details stored in particular operating units in the purchasing and payables system. These links are used to ensure that when a change is made to an address book or contact delivery entry in the supplier’s profile, the system knows which operating unit to update when the buyer administrator promotes the changes to the purchasing and payables system. If the supplier’s details are used in multiple operating units that are covered by multiple supplier management groups, any update by a buyer administrator only uses the subset of links applicable to their supplier management group.

Establishing these links is particularly important for existing suppliers who have details in different operating units in the purchasing and payables system but do not yet have a supplier profile. Tools are provided that allow buyer administrators to use the details from the purchasing and payables system to create Address Book and Contact Directories entries, automatically establishing the links between the appropriate records. This ensures that when suppliers subsequently change any of their profile details, the relevant records in the purchasing and payables system can be updated using the links established. If instead, existing suppliers are allowed to create their own address book and contact directory records, these will not be linked to any of the corresponding records that already exist in the purchasing and payables system. It will be up to the buyer administrators to manually link these records to the corresponding details in the purchasing and payables systems.

To implement the Supplier Profile Maintenance feature, you must:

1. Install FPI Patchset (Required).
2. Define Business Classifications List of Values (Optional).
3. Set Up Products and Services Classifications (Optional).
4. Create Address Books for Existing Suppliers (Required).
5. Create Contact Directory for Existing Suppliers (Required).
6. Migrate Account Assignments for Existing Supplier Bank Accounts.
7. Assign Supplier Profile Manager Responsibility to Appropriate Supplier Users (Required).

Steps 1-3 are only performed once. Steps 4-6 are performed once for each existing supplier.
Step 1: Install FPI Patchset (Required)

To implement the Supplier Profile Maintenance feature you must first install the TCA and HR patches for patchset FPI. Note that if you previously implemented the Supplier Self-Service Registration feature, you have already installed these patches and do not need to install them again.

Step 2: Define Business Classifications List of Values (Required)

You can define a list of business classifications that you would like new and existing suppliers to use to classify themselves. For example, you may have legal requirements to which you must adhere that differentiate between types of suppliers or for which a particular supplier must be certified. The business type and certification status can be tracked in the Supplier Profile.

The system comes pre-seeded with the following values:

- Minority Owned
- Woman Owned
- Small Business
- Hubzone
- Veteran Owned
- Service Disabled Veteran Owned

You cannot delete or update Minority Owned, Woman Owned, and Small Business values, but you can remove or update the other values, and you can add additional values as needed.

To define the classifications available to your suppliers:

1. Access the Application Developer responsibility.

2. Select Application, then Lookups.

3. Select Application Object Library.

4. Position your cursor in the Type field and click the flashlight icon. Search for POS_BUSINESS_CLASSIFICATIONS.
5. Edit the list to include your new classifications. Deselect the Enabled checkbox to remove any existing classifications. Add a new row to the table to include any new classification.

6. Save your work.

**Step 3: Set Up the Products and Services Classifications (Required)**

You can use the values available from the Purchasing Item Categories flexfield to set up a list or hierarchy of products and service categories by which you would like your suppliers to classify themselves. This affords the buying organization the opportunity to gather much more detailed information than can be determined only from the supplier’s SIC code or similar information. Once you have identified the appropriate categories, suppliers can classify themselves in their profiles.

The Products and Services Classification setup should only be done once. Any subsequent change to the configuration would cause suppliers to lose any existing category data entered.

To set up products and services categories:


2. Select Setup, then Profile Management Configuration, then Products and Services Setup.
3. On the **Products and Services Category Setup** page, ensure the appropriate segments are in the Selected Segments section. The **Products and Services Category Setup** page will display a list of available category segments. The segments to be used for the definition need to be selected. Where it is intended for a hierarchy to be established, the segments should be ordered to match the levels required in the hierarchy.

   **Note:** The POS: Product and Service Segment Definition option can only reference segments with a validation type of Independent, Dependent, Translatable Independent, Translatable Dependent, and/or Table. Segments with any other validation type cannot be used. Also, segments with a validation type of Table cannot have blank variables in any of the table columns or the WHERE/ORDER BY fields.

   **Note:** If you wish to use segments whose validation types do not follow the rules above, you must either change the validation type or define a new segment with a proper validation type.

4. Click Apply.

**To filter out unnecessary product/service values:**

Not all the category values used by the Item Categories flexfield may be appropriate for selection by your suppliers. You can filter category values so they are not visible to suppliers and thus cannot be selected for categorization.

1. Access the Purchasing Super User or the Purchasing Manager associated with the operating unit you wish to update.

2. Select Setup, then Items, then Categories, then Default Category Sets.

3. Find and note the category set used for the Purchasing Functional Area.

4. Select Category Sets.

5. Find the Operating Unit for which you wish to filter the item display. (Note the search field searches on Operating Unit code not name.)

6. On the Category Sets form, search for the category set identified above.

7. Note the Flex Structure value.

8. Close the form and select Category Codes.

9. On the Find Structures form, enter the flex structure name identified above. Click
Find.

10. On the Categories form, deselect the Viewable by Supplier checkbox for any categories you wish to hide from your suppliers.

11. Save your work.

Step 4: Create Address Books for Existing Suppliers (Required)

For each supplier's profile, there is one address book. This book contains the address names and address details for all that supplier's locations.

If the supplier already exists in your purchasing and payables system, they already have site name and detail information for particular operating units. When you implement the supplier profile feature, you use this existing supplier information to create entries in the supplier's address book. You should create address book entries using existing information before you allow existing supplier users access to their profiles. This way, you can ensure that the links between the existing supplier site information and the new supplier address book records are created correctly. Creating links between existing site records and the supplier address book ensures that future updates to addresses will be processed correctly, and the appropriate site information in the purchasing and payables system will be updated when new information is added or existing information is changed in the supplier profile. If you allow suppliers to create entries in their address book before you have created the links between the address book and the existing site information, you (or a buyer administrator) will have to manually link any new address information to the existing site information.

Creating Address Book Entries Using Existing Site Record Information

Your existing suppliers will most likely have sites divided among several of your buying organization's operating units and there may be discrepancies between the data stored in the different operating units. When you create the supplier's address book, you want to consolidate as much of this location information as possible. The Supplier Profile Management feature provides tools that simplify the creation of address book entries using existing site information. These tools allow you to select common site records in multiple operating units and use their details to create a single address record. You can also identify potentially conflicting or inconsistent site information across operating units and modify the information as needed to allow for the correct creation of an address.

For example, there may be site records in different operating units that share a common name but have inconsistent details, or sites that have the same details but different names. Once you have begun using site records to create address entries, there may be sites that cannot be used because they would conflict with the newly created address name or details.

Rules for Handling Site and Address Inconsistencies

When creating addresses, buyer administrators can only view and use existing details
for sites in the operating units within their supplier management group. They can review site information and then select multiple site records to use to create address entries. Any inconsistencies or conflicts in the site records they have selected will be highlighted to the buyer administrator so that they can take the appropriate remedial action.

For example, assume that a supplier has a site record called HQ defined in two operating units and that one has site details of 507 5th Ave., New York, and the other has site detail of 567 Market St., San Francisco. You can select both sites and try to create an HQ address, but a warning will be generated since the system will not be able to determine which is the correct HQ entry to use.

When the system detects conflicting site name or details information between sites you have selected for address creation, you receive a message and can choose from the following options:

- If you have selected sites that have duplicate site names but different site details, you receive an error message and should do one of the following:
  - Deselect one of the conflicting entries and continue generating addresses, so that the correct record is used to generate the address.
  - Cancel and modify the site details of one of the entries to mirror the details of the other before attempting to create addresses again. This modification must be made in the purchasing and payables system.

- If there are duplicate site details but different site names, you receive a warning message asking you whether you wish to create separate addresses that share the same details. In this case you should:
  - Deselect one of the conflicting entries and continue generating the addresses.
  - Cancel and modify the site details of one of the entries to mirror the details of the other. This modification must be made in the purchasing and payables system.
  - Continue with both site/address combinations to create multiple address entries.

Address Book Creation Example
The following example shows how existing supplier site information can be used by buyer administrators to create address book entries for an existing supplier.

Assume that a supplier exists in your purchasing and payables system with six site records. These sites are setup across four operating units as shown in the table below. Also, assume that there are two supplier management groups (Group 1 and Group 2) that each contain two of the operating units.
### Example Site Information for Existing Supplier

<table>
<thead>
<tr>
<th>Management Group</th>
<th>Operating Unit</th>
<th>Site Name</th>
<th>Site Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management Group 1</td>
<td>Vision Europe</td>
<td>HQ</td>
<td>4558 High St., London</td>
</tr>
<tr>
<td>(G1)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>South</td>
<td>674 Via DeVinci, Milan</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Vision France</td>
<td>HQ</td>
</tr>
<tr>
<td></td>
<td>Vision Consulting</td>
<td>HQ</td>
<td>4558 High St., London</td>
</tr>
<tr>
<td>Management Group 2</td>
<td>(G2)</td>
<td>Central</td>
<td>4558 High St., London</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Southeast</td>
<td>345 Via Verdi, Rome</td>
</tr>
<tr>
<td></td>
<td>Vision Services</td>
<td>Central</td>
<td>324 Rue de la Paix, Paris</td>
</tr>
<tr>
<td></td>
<td></td>
<td>North</td>
<td>455 Sveagatan, Stockholm</td>
</tr>
<tr>
<td></td>
<td></td>
<td>South</td>
<td>345 Via Verdi, Rome</td>
</tr>
<tr>
<td></td>
<td></td>
<td>HQ</td>
<td>567 Banhofstrasse, Zurich</td>
</tr>
<tr>
<td></td>
<td></td>
<td>East</td>
<td>345 Via Verdi, Rome</td>
</tr>
</tbody>
</table>

The buyer administrator for management group G1 accesses the **Create Address from Site Details** page and sees the following addresses listed as available for address creation. At this point, no addresses actually exist in the address book, so all the site entries (site name/site details combinations) defined for his operating units are available for address creation.

**Step 1: Buyer Administrator for Group One Creates Address Book Entries**
**Creation Step 1: Buyer Administrator (Group 1) Creates Address Book Entries: Before**

<table>
<thead>
<tr>
<th>Address Book Entries</th>
<th>Sites Available to Create Addresses</th>
<th>Sites Not Available to Create Addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>HQ</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>4558 High St., London</td>
<td></td>
</tr>
<tr>
<td>N/A</td>
<td>South</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>674 Via DeVinci, Milan</td>
<td></td>
</tr>
<tr>
<td>N/A</td>
<td>HQ</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>324 Rue de la Paix, Paris</td>
<td></td>
</tr>
</tbody>
</table>

The buyer administrator knows that the London site represents the supplier’s HQ and that the Paris site needs to be renamed to something more appropriate, so the buyer selects only the London and the Milan sites for address creation. The addresses for London and Milan are created in the address book, and the Paris HQ site becomes unavailable for address creation since its site details conflict with those for an existing HQ address.

At this point, the buyer administrator for supplier management group G1 has created all the addresses possible.

**Creation Step 2: Buyer Administrator (Group 2) Creates Address Book Entries: After**

<table>
<thead>
<tr>
<th>Address Book Entries</th>
<th>Sites Available to Create Addresses</th>
<th>Sites Not Available to Create Addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>HQ</td>
<td>N/A</td>
<td>HQ</td>
</tr>
<tr>
<td>4558 High St. London</td>
<td>N/A</td>
<td>324 Rue de la Paix, Paris</td>
</tr>
<tr>
<td>South</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>674 Via DeVinci, Milan</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Step 2: Buyer Administrator for Group Two Creates Address Book Entries**

Now the buyer administrator for management group G2 starts creating entries for the address book.

When he or she initially accesses the Create Addresses from Site Details page, he or she sees six out of eight sites that are available for address creation. There are eight possible
sites defined in the operating units that he administers. Two of the possible sites (HQ and South) are unavailable since their site names conflict with the two existing addresses previously created by the buyer administrator for management G1.

He also notices that the site entry, HQ/4558 High St., London shows up as available for address creation. This is because its details exactly match the HQ address record previously created by the administrator for supplier management group G1. If it is selected for address creation, it is simply linked to the existing address.

*Creation Step 2: Buyer Administrator (Group 2) Creates Address Book Entries: Before*

<table>
<thead>
<tr>
<th>Address Book Entries</th>
<th>Sites Available to Create Addresses</th>
<th>Sites Not Available to Create Addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>HQ</td>
<td>HQ</td>
<td>South</td>
</tr>
<tr>
<td>4558 High St. London</td>
<td>4558 High St., London</td>
<td>345 Via Verdi, Rome</td>
</tr>
<tr>
<td>South</td>
<td>Central</td>
<td>HQ</td>
</tr>
<tr>
<td>674 Via DeVinci, Milan</td>
<td>4558 High St., London</td>
<td>567 Banhofstrasse, Zurich</td>
</tr>
<tr>
<td>N/A</td>
<td>Central</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>324 Rue de la Paix, Paris</td>
<td></td>
</tr>
<tr>
<td>N/A</td>
<td>North</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>455 Sveagatan, Stockholm</td>
<td></td>
</tr>
<tr>
<td>N/A</td>
<td>Southeast</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>345 Via Verdi, Rome</td>
<td></td>
</tr>
<tr>
<td>N/A</td>
<td>East</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>345 Via Verdi, Rome</td>
<td></td>
</tr>
</tbody>
</table>

If the buyer administrator for supplier management group G2 selects all the available sites shown in the table above and tries to create addresses, the system will return an error message because two of the entries share the same site name (Central) but different details. (Note this error always precedes the similar warning message that is raised if a site selected for address creation shares the same details as an existing address but has a different name. The Central site in the Vision Consulting operating unit shares the same details as the new HQ address).

The buyer administrator can choose to modify the details for one site to make it match the other or deselect one of the conflicting sites. In this example, the administrator selects the Central/324 Rue de la Paix, Paris site to be known as Central.
The administrator also receives the warning message that two of the site entries share the same details but have different names. This is only a warning. Two addresses can have the same address details as long as they have differing names. In the example, the buyer administrator deselects the Southeast site entry and continues creating addresses.

Once the buyer administrator for management group G2 has resolved all conflicting site information, the final address book for the supplier contains the addresses shown below.

**Creation Step 2: Buyer Administrator (Group 2) Creates Address Book Entries: After**

<table>
<thead>
<tr>
<th>Address Book Entries</th>
<th>Sites Available to Create Addresses</th>
<th>Sites Not Available to Create Addresses</th>
</tr>
</thead>
<tbody>
<tr>
<td>HQ</td>
<td>N/A</td>
<td>HQ</td>
</tr>
<tr>
<td>4558 High St. London</td>
<td>324 Rue de la Paix, Paris</td>
<td></td>
</tr>
<tr>
<td>South</td>
<td>N/A</td>
<td>Central</td>
</tr>
<tr>
<td>674 Via DeVinci, Milan</td>
<td>4558 High St., London</td>
<td></td>
</tr>
<tr>
<td>Central</td>
<td>N/A</td>
<td>Southeast</td>
</tr>
<tr>
<td>324 Rue de la Paix, Paris</td>
<td>345 Via Verdi</td>
<td></td>
</tr>
<tr>
<td>North</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>455 Sveagatan, Stockholm</td>
<td></td>
<td></td>
</tr>
<tr>
<td>East</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>345 Via Verdi, Rome</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**To Create Addresses Using Existing Supplier Site Information:**

1. Access the Supplier Profile Administrator responsibility.

2. On the **Supplier Manage Profile** page, search for the supplier whose site address information you wish to use to create entries in the Address Directory.

3. When the search results appear, select the supplier and click the View Details icon.

4. On the **Supplier Details** page, click Address Book.

5. On the **Address Book** page, click Create from Sites.
6. The Create Address from Site Details page, by default, displays all sites within the operating units you administer that are available for address creation. If necessary, you can enter values in the Site Name and/or Operating Unit and query again to reduce the number of search results.

Only those sites from operating units that have setups for financials, payables, purchasing and receivables options will be displayed in the Create from Sites page.

To see any site entries unavailable to you (because the site name conflicts with existing address names), select Sites not available to create an Address.

7. Select the site(s) for which you wish to create an address, and click Create Address. If there are conflicts between the addresses you are trying to create, you must correct them.

8. The Confirmation page notifies you the address was created successfully.

Managing Site Details

After all the addresses have been created for a supplier, the Manage Site Details page can be used by administrators to maintain the sites that are linked to an address. Existing sites can be unlinked from the address (so that any changes to the address will not be reflected in that particular site), eligible sites can be linked with the address and the administrator can check to see if there are any sites that are similar to the address but that would need to be modified before they can be linked to the address.

To find out which sites exist but need to be updated before they can be used to create an address or linked to an existing address:

1. Access the address book and click the Manage Site Details icon for the existing address.

2. On the Manage Site Details page, select Supplier sites similar to the Address that cannot be linked, and then click Go.

3. The Site Details page for that supplier address shows any sites which conflict with this address. It also shows the operating unit containing that site. Use this information to access the purchasing and payables system and modify the site to remove the conflict.

Address Creation for New Suppliers

When a new supplier registers with the system, an address is automatically created in the address book using the address name provided by the supplier during registration. Also, supplier profile administrators (on the buying side) and supplier profile managers (on the supplier side) can create new addresses at any time. These addresses can be updated by the supplier and managed by the buyer. The buyer can incorporate the new supplier address information into the purchasing and payables system by navigating to the Address Book page, selecting the address, and clicking Update to Sites.
Step 5: Create the Contact Directory for Existing Suppliers (Required)

Each supplier’s profile also contains a Contact Directory. This directory contains the names and communication details for all of the contacts at the supplier that are appropriate for conducting business with the buying organization. Management of the Contact Directory is similar to that for the Address Book.

If the supplier already exists in your purchasing and payables system, it will already have contact details in one or more of your operating units. When you create the supplier profile, you must use this existing site contact information to create the entries in the supplier’s Contact Directory. These should be created before you allow existing supplier profile managers access to their profiles. This ensures that the links between the existing supplier site contact information and the new supplier profile are created correctly. Creating links between existing site contact records and the supplier contact directory ensures that future updates to contacts will be processed correctly and the appropriate site contact information in the purchasing and payables system will be updated when new information is added or existing information is changed in the supplier profile. If you allow suppliers to create entries in their contact directory before you create the links between the contacts and the existing site contact information, you will have to manually link any new contact information to the existing site contact records.

Creating Contact Directory Entries Using Existing Site Contact Record Information

As with addresses, existing suppliers will most likely have site contacts defined for multiple sites across several buying organization’s operating units. There may be discrepancies between the data stored in the different sites and/or operating units. When you create the supplier’s contact directory, you want to consolidate as much of this contact information as possible.

Each site contact will create a new Contact Directory record unless there is an exact match between the first name, last name and phone number for the contacts. These is no check for similar site contact records.

Since site contacts are defined for specific sites, a corresponding address entry for that site must exist in the Address Book before the site contact can be used to create an entry in the Contact Directory. Until the address exists, the site contact will not be available on the Create Site Contacts page.

Creating the Contract Directories Using Existing Information

An address must exist for each site whose site contacts you wish to setup into the Contact Directory.

To use existing site contact information to create a Contact Directory for the supplier:

1. Access the Supplier Profile Administrator responsibility.

2. On the Supplier Manage Profile page, search for the supplier whose site information you wish to use to create entries in the Contact Directory.
3. When the search results display, select the supplier and click the View Details icon.

4. On the Supplier Details page, click Contact Directory.

5. On the Contact Directory page, click "Create from Site Contacts."

6. On the Create Contact Directory Entries from Site Contacts page, select the contacts you wish to create and click Create Contact Directory Entry. This will create an entry for every site contact/site details defined for the supplier in the purchasing and payables system.

    **Associating Additional Addresses with a Site Contact**

When you use the existing supplier information to create entries in your Contact Directory, an entry is created for each site/contact combination you select. However, in addition to the contact/address combination created by the system, you may wish to associate a particular contact with additional addresses in the Address book.

To associate a contact with an additional address:

1. Access the Contact Directory page to display all the contacts you have defined for this supplier.

2. Click the Manage Address Details icon to display the Manage Address Details page for that contact.

3. Select the Addresses available to be linked to the contact radio button, and click Go. The Manage Address Details page redisplay with any additional supplier addresses to which the contact can be linked.

4. Select the address(es) and click Add Link to Contact. This creates a new link between the contact and the address.

**Creating Additional Contacts**

After the system has been implemented, suppliers can create new contacts and associate them with addresses. Buyer administrators can choose to accept these new contacts and, additionally, choose to incorporate the new information back into their core system by selecting the new entries and clicking the Update to Site Contacts button.

**Step 6: Migrate Account Assignments for Supplier Bank Accounts**

Each supplier can maintain their bank account and account assignment information in their profile. This allows suppliers to specify the bank accounts they have and the locations where the accounts are used.

For existing suppliers, bank account details will be automatically visible in their profile. However, account assignment information will not be available until the details have been migrated from the payables system into their profile. This is done using a
concurrent request script.

The script will migrate the supplier and site assignment details for each account into the supplier's profile. If there are inconsistencies between the site assignment settings in different operating units (such as the account site assignment is primary in one operating unit but not in another), then the details will not be migrated to the profile.

To migrate account Assignments for Supplier Bank Accounts:

1. Access the Purchasing Super User responsibility.

2. From the File menu, select Switch Responsibility.

3. In the Responsibilities window, choose Supplier Profile Administrator.

4. From the View menu, select Requests.

5. In the Find Requests window, click Submit New Request.

6. In the Submit a New Request window, select Single Request, and then select OK.

7. In the Submit Request window, select Migrate Account Assignment for Supplier Bank Accounts

8. Click within the Parameters section. In the Parameters window, select the appropriate supplier name, and then select OK.

9. Click Submit.

10. Note the Request ID for the request you submitted.

11. If you would like to submit another request, click Yes. If you are finished, click No.

**Step 7: Assign Appropriate Responsibilities to Supplier Users (Required)**

Once you have the supplier profile successfully implemented, you should assign the appropriate responsibility to supplier users at the supplier company.

- **Supplier Profile Manager**
  Users with this responsibility can update the company profile

- **Supplier Profile and User Manager**
  Users with this responsibility can update both the company profile as well as creating and updating supplier users' profiles (including submitting registration requests for users).

- **Supplier Profile Manager (View-only Contact Directory)**
See the *Oracle Applications System Administrator’s Guide* for instructions on assigning responsibilities.

Any update performed by a Supplier Profile Manager triggers a notification to the Supplier Profile Administrator(s). The administrators can access the changed profile and accept the update or reverse it. Accepting the update will promote the addition/changes into the purchasing and payables systems as appropriate.
Introduction to Supplier Administration

Supplier administration enables buying organizations to maintain current information about their suppliers and supplier users. Authorized buyers can invite or register suppliers. Once registered, suppliers can provide detailed information on their companies in the form of supplier profiles. Supplier profile information can be entered and maintained by both authorized personnel at the buying company as well as authorized users at the supplier companies. Updates performed by the supplier users are reviewed and, if approved by buyer administrators, can be promoted into the buying companies procurement systems. This removes much of the administrative burden from the buyer administrators and allows suppliers to maintain more up-to-date profile information on their company.

Supplier Administration consists of

- Supplier definition and maintenance
- Supplier registration
- Supplier user registration and maintenance

Supplier Definition and Maintenance

An important area of supplier administration is the process of completely defining suppliers to the procurement system. This includes, but is not limited to, detailed information of the supplier's:

- Corporate structure
- Tax regulations and reporting requirements
- Site information
• Contact information
• Purchasing defaults and settings
• Payables defaults and settings
• Invoicing procedures
• Receiving defaults
• Banking definitions
• Accounting definitions

Supplier Registration
Using supplier registration, suppliers can register for access to Oracle Self-Service
applications such as Oracle Sourcing, Oracle iSupplier Portal, or Oracle Collaborative
Planning. Once the registration request and been completed and submitted, and a
supplier profile administrator has approved the request, a notification is sent to the
main supplier contact, and users at the company can begin registering and requesting
system access.

Supplier User Registration and Maintenance
Once the supplier company is defined and registered with the buyer’s procurement
system, users at the supplier company can also begin registering as well. Once their
registration requests are approved, the supplier users can begin accessing the system
subject to any security restrictions applied by the approver.

After the supplier users are registered with the system, personal and access information
is maintained for them in their individual profiles. Changes to this information can be
entered by supplier user administrators at your company. Additionally, updates can be
requested by supplier user managers at a supplier company for users at that company.
These updates are reviewed and, if approved, entered by a supplier profile
administrator (usually during the course of updating that company’s contact directory).

How Oracle Products Use Supplier Information
Four Oracle financial applications use supplier information: Payables, Purchasing,
Assets, and Property Manager. If you use more than one of these products, supplier
information is shared with the other product(s). In addition to the supplier name and
address, Payables and Purchasing require you to enter additional information about the
supplier. Assets and Property Manager require no additional information. However, for
any product, you can record a variety of other supplier information in the many
optional fields.
Oracle Payables

Before entering invoices for a supplier, you must enter at least one pay site for the supplier.

The following examples show how entering additional supplier information can help you manage your Payables system:

- Record bank account information that Payables uses to generate an electronic payment for the supplier.

- Assign a default Pay Group or Payment Priority to a supplier or supplier site so that Payables defaults that Pay Group or Payment Priority to all invoices you enter for that supplier site. You can initiate a payment batch for a specific Pay Group or a range of Payment Priorities.

- Select the Hold Unmatched Invoices option for a supplier or supplier site to have Payables automatically apply a hold to any invoice you enter that is not matched to a purchase order or receipt.

- Create a supplier and link it to an employee so you can pay the employee’s expense reports.

Oracle Purchasing

Before entering purchase orders for a supplier, you must enter at least one purchasing site for the supplier.

The following are examples of how entering additional supplier information can help you manage your Purchasing system:

- Purchasing uses supplier and supplier site information to enter default values, such as Freight Terms and Shipment Method for all of the supplier’s purchase orders. See: Entering Purchase Order Headers, Oracle Purchasing User’s Guide.

- Define receiving control options to ensure that products you receive are within the tolerances you specify and the guidelines you choose. For example, you can specify a Quantity Received Tolerance, and a range of days in which you will allow receipt of shipments. See: Define Receiving Options, Oracle Purchasing User’s Guide.

Oracle Assets

Oracle Assets uses only the Supplier Name, Supplier Number, and Inactive On date although you can record additional supplier information for your own reference.
Oracle Property Manager

Payables imports lease invoices from Oracle Property Manager. You must enter at least one pay site for a supplier before importing invoices from Oracle Property Manager.

Controlling Entry of Supplier Information

Multiple Organization Support

Help Home, page 5-

If you use the Multiple Organization Support feature, you cannot enter the following fields at the Supplier level: Liability account, Prepayment account, Distribution Set, Invoice Tax Code, and Future Dated Payment account. You can enter these fields only at the supplier site level.

Supplier numbering

You can assign your own supplier numbers when you enter suppliers, or, if you enable the Automatic Supplier Numbering Financials option, the system automatically assigns supplier numbers for you.

Controlling Duplicate Supplier Entry

You cannot enter a new supplier with exactly the same name as an existing supplier. However, if you do get multiple names in your system which actually refer to the same supplier, you can merge them. For example, you may inadvertently enter both Orion Corporation and Orion for the same supplier. The system accepts these as two distinct supplier names and understands them as two different suppliers. You can merge both into a single supplier record. When you submit Supplier Merge, you can choose to update the associated purchase orders and invoices to refer to the merged supplier. See Payables documentation for details on running the supplier merge program.

Tip: Use a naming convention that minimizes risk of separate entries of the same supplier under different names. For example, if you consistently spell the full name of a company, do not enter both Orion Corp. and Orion Corporation.

Defaulting Financials and Payables options to suppliers

You can define Financials and Payables options to speed both supplier and invoice entry. The system defaults the values you enter for certain Financials and Payables options to each supplier you enter. That is, the values for these options become the defaults for the corresponding options in the Suppliers window. From the supplier, the
system defaults values to corresponding fields for each new supplier site you enter. Payables defaults the values you enter at the supplier site to each invoice you enter for the supplier site. Payables enters defaults for your convenience and you can override most defaults during supplier entry and during invoice entry.

**Note:** Updating default information at the supplier level does not update existing supplier sites. To update existing supplier site values, do so at the supplier site level.

### Defaulting Financials and Purchasing options to suppliers

You can define Financials and Purchasing options to speed both supplier and purchase order entry. The system defaults the values you enter for certain Financials and Purchasing options to each supplier you enter. That is, the values for these Financials and Purchasing options become the defaults for the corresponding options in the Suppliers window. From the supplier, the system defaults values to corresponding fields for each new supplier site you enter. Payables defaults the values you enter at the supplier site to each purchase order you enter for the supplier site. Payables enters defaults for your convenience and you can override most defaults during supplier entry and during invoice entry. See Purchase Order Defaulting Rules, *Oracle Purchasing User’s Guide* for details.

### Entering Supplier Information

Define suppliers to record information about individuals and companies from whom you purchase goods and services, and also to record information about employees whom you reimburse for expense reports. If your supplier does business from multiple locations, you store supplier information only once, and enter supplier sites for each location. Different supplier sites can function as pay sites, purchasing sites, RFQ only sites, or procurement card sites. For example, for a single supplier, you can buy from several different sites and send payments to several different sites. Most supplier-level information automatically defaults to all supplier sites to facilitate supplier site entry. However, you can override these defaults and have unique information for each site.

The system uses information you enter for suppliers and supplier sites to provide default values when you later enter transactions for a supplier site. Most information you enter at the supplier level used only to provide defaults at the supplier site level. When the system enters that information in a later transaction, it only uses supplier site information as a default, even if the supplier site value is null and the supplier has a value. If you update information at the supplier level, existing supplier sites are not updated.

Users with the Supplier Profile Administrator responsibility can access and use the Suppliers page to define and manage supplier information. This information is
managed by iSupplier Portal. Supplier users who have the Supplier Profile Management or the iSupplier Portal Full Access responsibility, can access their own external profile information (information not internal to the buying organization) and in many cases update their information (for example, address or contact information). Any changes performed by a supplier user is subject to approval by a buyer administrator.

There are many tasks involved in setting up new suppliers. iSupplier Portal provides an easy to use interface that allows you to:

- Enter high-level information about the supplier.
- Document the structure and organization of the supplier.
- Create supplier sites.
- Document the applicable tax requirements for the supplier.
- Create a directory of supplier contacts.
- Identify appropriate business classifications for the supplier.
- Specify bank account information for the supplier.
- List the products and services provided by the supplier.

Additionally, you can document the transaction controls and defaults such as:

- Set purchasing defaults.
- Set receiving default.
- Set payables defaults.
- Specify invoice management controls.

For instructions on performing these tasks, see Defining Standard Suppliers, page 5-6 Setting Up Supplier Hierarchies, page 5-17 Factoring Arrangements, page 5-18

For detailed information on the fields that appear on the supplier definition pages, see the Oracle Payables User Guide, page 5-5.

**Defining Standard Suppliers**

Help Home, page 5- / Entering Supplier Information, page 5-5

**Prerequisites**

Before entering any new supplier information, contact your Payables and Purchasing...
administrators to ensure the following:

- Verify that the supplier has not already been entered in the system. Use the Suppliers Report, and Supplier Audit Report.

- The following lookups have been defined in the Oracle Purchasing Lookups window: Pay Group, Supplier Type, Minority Group.

- Supplier Types have been defined in the Oracle Payables Lookups window.

- Purchasing setup has been completed.

- Financials Options have been defined. 

- Payment terms have been defined. (optional)

- Distribution Sets have been defined. (optional)

**Purchasing Prerequisites**

- Supplier Types have been defined in the Oracle Payables Lookups window.

- Ship Via codes have been defined in the Defining Freight Carriers window.

- FOB codes, Minority Groups and Freight Terms codes have been defined in the Oracle Purchasing Lookups window.

**To enter basic supplier information:**

For detailed information on fields used to define suppliers, see the Oracle Payables User Guide, page 5-5.

1. From the **Suppliers** home page, click Create Supplier.

2. On the **Create Supplier** page:

   - Select standard supplier as the supplier type. **Note:** See Setting Up Supplier Hierarchies, page 5-17 for instructions on creating parent-child relationships between suppliers.

   - Enter a unique supplier name in the Organization Name field.

     **Tip:** Use a naming convention that minimizes risk of separate entries for the same supplier under different names. For example, if you consistently spell the full name of a supplier, do not enter both Orion Corp. and Orion Corporation.
• Select the country of origin for the new supplier.

• Optionally enter the supplier's tax identification number in the Taxpayer ID field; for example, a corporation or partnership's federal identification number/federal tax ID.

• Optionally enter the value-added tax (VAT) registration number in the Tax Registration Number field if you are entering a VAT supplier.

• Optionally, enter values for the remaining fields.

• Click Apply. You return to the Suppliers page with the information on the new supplier displayed.

Once you have the supplier initially created, you can use the options from the Quick Update navigation bar on the left side of the page to define other information about your new supplier. You can:

• Define organizational and structural information about the supplier.

• Define supplier addresses. page 5-9

• Define supplier sites. page 5-10 Note that supplier sites are tied to an address, so you must create at least one supplier address before you can create a supplier site.

• Define contacts, page 5-10 and associate them with addresses and sites.

• Define tax, page 5-11 information for the supplier.

• Specify business classifications, page 5-12 such as certifications or ownership status.

• Identify the products and services, page 5-12 the supplier provides.

• Define information about the bank accounts, page 5-13 you use with the supplier.

• You can use internally created surveys, page 5-14 to monitor and evaluate supplier performance and satisfaction.

• You can create accounting information, page 5-14 on the accounts you use with this supplier.

• Specify what tax reporting, page 5-14 requirements are used for this supplier.

• Define purchasing defaults., page 5-15

• Define receiving defaults., page 5-15
Define payables defaults., page 5-16
Define invoice management defaults., page 5-17

Defining Organization and Structure Information

You use the **Organization** information page to document high-level company information such as, structural, operational, personnel and financial details.

For field level details about fields on this page, see the Oracle Applications Financials Glossary.

To complete the **Organization** information page:

1. From the **Quick Update** page, click "Organization" under Company Profile in the navigation bar on the left.

2. On the **Organization** information page, the supplier name and supplier number are displayed.

3. Complete the relevant fields on the page.
   
   **Note:** to enter information for franchise or subsidiary hierarchy, enter the name or number of the parent supplier in the appropriate fields. No parent supplier information is defaulted into the child company unless the parent is an actual supplier to the child company.

Defining Supplier Addresses

Define supplier addresses in your address book. Once you have defined addresses for your supplier, you can create supplier sites and tie them to an address.

For field level details about fields on this page, see the Oracle Applications Financials Glossary.

To **define a supplier address:**

1. From the **Suppliers** page, click "Address Book."

2. On the **Address Book** page, click Create.

3. On the Create Address page, specify a country, Address 1 value, and Address name.

4. Complete any additional relevant fields on the page.
   
   **Note:** If you select "Update to all sites created for this address," The communication and address purpose will be defaulted to any sites created for this address.

5. When you have entered all relevant address information, click Continue. You can
continue and define sites for this address.

Defining Supplier Sites

Once you have defined your addresses, you can create sites for use when processing transactions with your suppliers.

To create a site:

1. Locate the address for the site. You can do this by clicking "Address Book." The Address Book page displays all the addresses for the supplier.

2. Click the Manage Sites icon for the address.

3. On the Site Creation page, you see your new address and a list of the organizations to which you have access. You can create a new site (or multiple sites) for this address and link them to an organization.

4. Select the organization(s) for which you wish to create one or more sites for this address.

5. The site name defaults to the address name, but you can give the site a different name, if appropriate.

6. When finished, click Apply.

Defining Contacts

You can define contacts and associate them with supplier sites. You can simply create a contact for the supplier, or create the contact and also create an iSupplier Portal user account at the same time.

For field level details about fields on this page, see the Oracle Applications Financials Glossary.

To create only supplier contacts:

1. From the Suppliers page, click "Contact Directory" in the navigation bar on the left.

2. On the Contact Directory page, click Create.

3. On the Add Contact page, enter values in the fields as appropriate (a value for Last Name is required).

To associate an address with this contact:

1. Click Add Another Row.

2. Enter an address name, or click the magnifying glass icon to access the Search
and Select: Address page to identify the address.

4. When finished defining your supplier contact, click Apply.

To also create a user account:
1. Use steps 1 - 3 above to create your contact.
2. Select Create User Account for this Contact.
3. When the page redisplays, enter a new userid or accept the default (the email value).
4. Select the appropriate iSupplier Portal responsibilities to be granted to the user.
5. Specify all appropriate user restrictions. If you do not restrict users, they have access to all information.
   • Supplier restrictions
   • Site restrictions - select the supplier sites to which this user will have access.
     1. Click Manage Sites.
     2. Select the sites available to this user.
     3. Click Apply.
6. Continue adding addresses for the contact/user.
7. When finished, click Apply.

**Defining Tax Details**

You can define organization and site default income and transaction tax information and requirements.

For detailed information about fields on this page, see the Oracle Applications Financials Glossary.

**To define tax information:**
1. From the Suppliers page, click "Tax Details" in the navigation bar on the left hand side.
2. On the Tax Details page, enter the appropriate values for income tax requirements.
3. In the Transaction Tax section, enter default control values.
4. Create default tax registrations and fiscal classifications as appropriate.

5. You can specify withholding directions and identify a withholding tax group at the site level if withholding is allowed for this supplier and allowed for the organization to which the site is assigned.

6. To update transaction tax at the site level, click the Update icon for the site.

7. When finished, click Save.

**Defining Business Classifications**

You can document important information about the supplier such as ownership status or certification.

For detailed information about fields on this page, see the Oracle Applications Financials Glossary.

**To define business classifications:**

1. From the Suppliers page, click "Business Classifications" in the navigation bar on the left.

2. On the Business Classifications page, click Applicable for whichever classifications apply to this supplier. Note that for some classifications, additional information must be entered.

3. When finished entering classification information, click Save. The Status of the classification changes to Pending. Once an administrator reviews and decides to allow the classification request, the Status changes to Approved.

**Defining Products and Services**

On the Products and Services page, you can identify which products and services this supplier provides from the list of values.

For detailed information about fields on this page, see the Oracle Applications Financials Glossary.

- From the Suppliers Page, click "Products and Services."

- On the Update Products and Services page, click Add.

- The Add Products and Services page displays the predefined product and service values.

- If any of the products or services displayed are provided by the new supplier, click Applicable for that product or service, and click Apply.
• If the product or service entry displayed has subcategories defined, click the View Sub-Categories icon.

• If any of the sub-category products or services displayed are provided by the new supplier, click Applicable for that product or service, and click Apply.

• Click "Return to Products and Services" to return to the Update Products and Services page.

**Defining Bank Account Details**

Use the Banking Details page to create bank accounts for your supplier.

For detailed information about fields on this page, see the Oracle Applications Financials Glossary,

1. From the Suppliers page, click "Banking Details."

2. On the Banking Details page, click Create.

3. When creating a bank account, you can create a new account at an existing bank/branch, or a new bank and/or branch.
   1. To create an account at a new bank:
      1. Identify the country where the bank is located.
      2. Click Create New Bank.
      3. Enter the bank name and number.
      4. Click "Show Bank Details" and enter details about the new bank as needed.

2. To use an existing bank
   1. Click the magnifying glass icon.
   2. Use the Search and Select page to identify the bank.

3. To create a new branch
   1. Click Create New Branch.
   2. Enter the branch name and number.
   3. Click "Show Branch Details" link and enter details about the new branch as needed.
4. Enter the detail information about the new branch.

4. To use and existing branch:
   1. Click the magnifying glass icon.
   2. Use the Search and Select page to identify the branch.

4. Once you have the new or existing bank/branch identified, you can create your new account. Enter the remaining account and account owner information in the Bank Account region.

5. When finished, click Apply.

**Using Surveys**

You can use surveys to communicate with a supplier to determine past performance or other metrics. Once a survey has been created, it can be accessed by a supplier contact. You can view the response to the survey.

**Defining Account Information**

Use the Update Accounting page to define the accounts you use with this supplier. For each site you can define a Liability, Prepayment, Bills Payable, and Distribution Set. Use the search fields to display the sites for which you wish to define your accounts. If you need to create a new site, click Create.

**Defining Tax Reporting Requirements**

Use the Tax and Reporting page to define your transaction level tax for this supplier. For detailed information about fields on this page, see the Oracle Applications Financials Glossary.

1. From the Suppliers page, click "Tax and Reporting."

2. On the Tax and Reporting page, enter your tax-related information.

3. To enter new Tax Reporting Codes, click Add Another Row. Enter values or use the Search and Select queries to identify the correct entries.

4. You can also specify tax information at the site level. All sites defined for this supplier are displayed in the Supplier Sites region at the bottom of the page. To change the transaction tax information for a particular site, click the pencil icon.

5. You can add an additional supplier site by clicking the Create button.
6. When you have finished entering your tax information, click Save.

**Defining Purchasing Defaults**

Use the **Purchasing** page to define the purchasing details for this supplier. You can set defaults at the supplier level or the supplier site level.

For detailed information about fields on this page, see the Oracle Applications Financials Glossary.

When you enter the **Update Purchasing** page, by default, all your sites are displayed. You can restrict the display by site status, site name, or operating unit, by selecting a status, and/or entering a site or operating unit name, and clicking Go.

1. From the **Suppliers** page, click "Purchasing."

2. On the **Update Purchasing** page, enter the defaults for this supplier.

3. The Supplier Sites region displays the chosen sites defined to this supplier (by default, the page displays all sites). Any values defined for this site on the **Quick Update** page appear, but you can override them here. You specify purchasing defaults at the site level by clicking the tabs and entering the site-specific details for that tab's information.

4. If you wish to create a new supplier site, click Create.
   
   1. On the **Create Address: Site Creation** page, search and select the supplier address.
   
   2. When the page redisplay, all your organizations are displayed with the address name inserted in the Site Name field.
   
   3. To create one or more sites, select the organization and enter a new site name if appropriate.
   
   4. When finished, click Apply.
   
   5. When you are returned to the main **Purchasing Details** page, click the update icon for the new sites to define any site-specific defaults.

5. When you are finished defining purchasing defaults, click Save.

**Defining Receiving Defaults**

Use the **Receiving** page to specify shipping and receiving defaults for this supplier.

For detailed information about fields on this page, see the Oracle Applications Financials Glossary,
1. From the **Suppliers** page, click "Receiving."

2. On the **Update Receiving** page, enter the shipping and receiving defaults for this supplier.

3. When finished, click Save.

**Defining Payables Defaults**

Use the **Payment Details** page to define payables defaults for this supplier. When you enter the **Payment Details** page, by default, all sites for the supplier are displayed. You can restrict the display by site status, site name, or operating unit, by selecting a status, and/or entering a site or operating unit name, and clicking Go.

For detailed information about fields on this page, see the Oracle Applications Financials Glossary.

1. From the **Suppliers** page, click "Payment Details."

2. On the **Payment Details** page, enter the default payment method for this supplier. Select from one of the payment methods displayed. If you need to use a different payment method, click Add. Search and select the new payment method from the table. Click Default to indicate the default method for this supplier.

3. Use the tabs to assign defaults for delivery attributes, payment specifications, and separate remittance advice delivery.

4. The Supplier Sites region displays the sites defined to this supplier. You can specify payment defaults at the site level by clicking Update for the site whose defaults you wish to define.

5. Use the tabs to define the defaults for the site.

6. If you wish to create a new supplier site, click Create.
   1. On the **Create Address: Site Creation** page, search and select the supplier address.

   2. When the page redisplay, all your organizations are displayed with the address name inserted in the Site Name field.

   3. To create one or more sites, select the organization and enter a new site name if appropriate.

   4. When finished, click Apply.

   5. When you are returned to the main **Payment Details** page, click the update icon for the new sites to define any site-specific defaults.
7. When finished defining payment defaults, click Save.

**Defining Invoice Management Defaults**

Use the Invoice Management page to define invoicing defaults.

For detailed information about fields on this page, see the Oracle Applications Financials Glossary.

1. From the Suppliers page, click Invoice Management.

2. On the Update Invoice Management page, enter the invoicing defaults for this supplier.

3. The Supplier Sites region displays the sites defined to this supplier. You can specify invoicing defaults at the site level by clicking the update icon for the site whose invoicing defaults you wish to define. Clicking the tabs and entering the site-specific details for that tab’s information.

4. Use the tabs to define the defaults for that site

5. When finished, click Save.

6. If you wish to create a new supplier site, click Create.
   1. On the Create Address: Site Creation page, search and select the supplier address.

   2. When the page redispays, all your organizations are displayed with the address name inserted in the Site Name field.

   3. To create one or more sites, select the organization and enter a new site name if appropriate.

   4. When finished, click Apply.

   5. When you are returned to the main Update Invoice Management page, click the update icon for the new sites to define any site-specific defaults.

**Setting Up Supplier Hierarchies**

Help Home, page 5-6  / Entering Supplier Information, page 5-5

You can create a hierarchy between two suppliers by creating one supplier as a child of another supplier, or by creating an employee as a supplier.

You can record the relationship between a franchise or subsidiary and its parent company by recording a value for the Parent Supplier field on the Organization page.
Information will not automatically default from parent to subsidiary suppliers unless the subsidiary is a supplier site of the parent.

**Entering Employees as Suppliers**

You must enter an employee as a supplier before you can pay the employee's expense reports.

To enter an employee as a supplier:

- On the *Suppliers* page click Create Supplier.

- On the *Create Supplier* page, select the internal employee option from the Supplier Type menu.

- When the page redisplays, click the magnifying glass icon and use the Search and Select feature to identify the employee. Select either Home or Office as the employee location.

- Click Apply.

- When you return to the *Quick Update* page, the locations you selected appear as supplier sites.

**Factoring Arrangements**

If a supplier sells its receivables to a factor, you can enter invoices for the supplier and make payments to the factor by creating a pay site defined for the factor. On the first address line enter the name of the factor preceded by the word "and" or "or." On the remaining two address lines, enter the address of the factor. Payables then addresses the payment to the supplier and/or the factor, since Payables prints the supplier name and the three address lines on each payment.

Example 1:

Supplier ABC has sold their receivables to Factor B, and you want to send payments directly to Factor B. You want your payment document to be made out to "ABC Or Factor B." Define a pay site for supplier ABC called "Factor B." On the first address line enter "OR Factor B." On the remaining two address lines enter Factor B’s address.

If you select the Factor B supplier site when you enter and pay an invoice for ABC, the first two lines of the payment will read "Payable to: ABC OR Factor B" and the factor can endorse and cash the payment.

Example 2:

Supplier ABC has sold their receivables to Factor B, and you want to send payments directly to Factor B. You want your payment document to be made out to "ABC AND
Factor B.” Define a pay site for supplier ABC called "Factor B." On the first address line enter "AND Factor B.” On the remaining two address lines enter Factor B’s address.

If you select the Factor B supplier site when you enter and pay an invoice for ABC, the first two lines of the payment will read "Payable to: ABC AND Factor B." Both the supplier and the factor will have to endorse the payment before it can be cashed by the factor.

**Maintaining Supplier Information**

Help Home, page 5-

**Finding Suppliers**

You can find suppliers by using the Search region on the Suppliers page. In the Search region, you can enter a wide variety of search criteria, including supplier name, supplier number, tax registration or DUNS number (to see more search fields that are available to you, click the View More Options link). Enter as many search values as are necessary to identify your target supplier(s), and click Go.

**To find a supplier using the Search region:**

1. On the Suppliers home page, enter your search values into the appropriate search fields. Open and use the See More Options fields if necessary.

2. Click Go. The search results appear in the table below the search fields.

**Reviewing Supplier Information**

You can review and update your supplier information.

**To review supplier information:**

1. Locate the supplier.

2. When the search results display, locate the supplier and click the Update icon.

3. The Quick Update page displays high-level information for the supplier. The table at the bottom of the page shows the supplier sites, appearing alphabetically.

4. You can restrict the list of supplier sites by entering values in the search fields in the Supplier Sites region, and clicking Go.

5. For each supplier site, key purchasing and payables attributes are shown. You can use the tabs above the table to toggle between views.
Updating Supplier and Supplier Site Information

Remember that when you make changes to values that default to Payables and Purchasing documents, the changed value defaults only to new documents you subsequently enter or create. For example, if you change the Pay Group for a supplier site, the new Pay Group will default to new invoices you enter, but the change will not affect existing invoices. Also, if you change a supplier value that defaults to supplier sites, the change will only affect new supplier sites you create, but the change will not affect existing supplier sites. Therefore, the change will not affect documents you subsequently create for existing supplier sites. If you want a change to affect documents you enter or create for an existing supplier site, be sure to make the changes at the supplier site level.

To update supplier and supplier site information:

1. Locate the supplier.

2. On the Quick Update page, make any changes in the appropriate fields.

3. Use the Key Purchasing Options and the Key Payables Options tabs to toggle between views to update purchasing and/or payables attributes for a particular supplier site.

4. When finished updating changes on the Quick Update page, save your work.

If you wish to add a new supplier site, click Create in the Supplier Sites table. Follow the instructions in Creating Supplier Sites to enter your new supplier site information.

Note that you can use the navigation bar on the left side of the page to access additional pages and update other supplier information, for example, tax information, bank account information, and contact information.

Reviewing and Approving Supplier Initiated Profile Request Changes

Designated administrators at a supplier company have the authority to update the profile for the company as well as its employees who are users of iSupplier Portal. These changes include:

- Address changes
- Contact changes
- Bank account changes
- Business classifications changes
- Product/Services changes

Once the supplier administrator has submitted these change requests, you must
To approve address change requests:

1. From the Suppliers Home page, click Supplier Address Requests in the To Do List.

2. The Supplier Profile Change Requests page, displays all address requests available to you for approval. These could be either a change to an existing address or a request to create a new address.

3. To Approve or Reject the request without viewing the details, select the request and click either Approve or Reject.

4. To view and/or modify the details of the change request, click the pencil icon.

5. View the details of the requests and make any appropriate modifications.

6. After having viewed and/or modified any details, click Apply to approve the change or click Reject to deny the change.

To approve changes to a supplier contact:

1. From the Suppliers Home page, click Supplier Contact Requests in the To Do List.

2. The Supplier Profile Change Requests page, displays all contact requests available to you for approval. These could be either a change to an existing contact’s information or a request to create a new contact.

3. To Approve or Reject the request without viewing the details, select the request and click either Approve or Reject.

4. To view and/or modify the details of the change request, click the pencil icon.

- If the request is to create a new contact,
  1. the Create New Contact page displays showing the information entered by the supplier administrator. You can update details of the request as necessary.
  2. You can create a new user account for the contact by clicking the Create User Account for the Contact checkbox and entering a username, specifying the allowable responsibilities, and any access restrictions.
  3. When finished, click Approve to create the new contact/user, or click Reject to deny the request.

- If the request is an update to an existing contact’s information:
  1. The Update Contact Change Request page. The page displays the current
information and the proposed information.

2. Update the information if needed.

3. Click Approve to allow the change, or click Reject to deny the change.

To approve a business classification request:
1. From the Suppliers Home page, click Supplier Business Classification Requests in the To Do List.

2. The Supplier Profile Change Requests page, displays all classification change requests available to you for approval.

3. View the details of the change request and click Approve or Reject.

To approve bank account requests:
1. From the Suppliers Home page, click Supplier Bank Account Requests in the To Do List.

2. The Bank Account Change Requests page, displays all account change requests available to you for approval.

3. Click the icon in the Review column.

4. On the Review Bank Account page, you can see the details of the account request.

5. Select an option from the Action menu and click Apply.
   • Click Verify Account to send a test transaction to the account to verify its existence.
   • Click Approve Account to promote the account information into the system
   • Click Reject to deny the account

Identifying Duplicate Suppliers

Although the system will not allow you to enter duplicate supplier names, you may inadvertently define the same supplier using two different names. For example, you might enter Orion Corporation and Orion Corp, or you might enter a contractor under his name and his company name. You might also create duplicate suppliers if you import suppliers from another accounts payable system.

If you want to know if a supplier exists, you can query the Supplier by using the
Supplier Search region of (the Suppliers page).

**Tip:** To avoid entering duplicate suppliers, consider developing and using standard naming conventions for suppliers, and restricting who can enter new suppliers.

**Employee Information**

Payables uses employee information to create and update employee type supplier records. You can then pay employees for expense reports and invoices. If your site uses Oracle HRMS, then you can access employee information entered by your Human Resources department through the People window. If your site does not have Oracle HRMS installed, you can access employee information in the Enter Person window.

To set up Payables for integration with employee information:

1. In the Financials Options window, set the options in the Human Resources region. These provide defaults during employee record entry.

2. In the Financials Options window, in the Supplier Entry region, for the Supplier Number Entry option, choose Automatic. If you don’t choose this option, then Payables can’t automatically create suppliers for you during Expense Report Import.

3. In the Payables Options window, set the options in the Expense Report region. Enable the Automatically Create Employee as Supplier option so Payables will automatically create a supplier record the first time you import an expense report for each employee.

4. Enter employee records. Either your Human Resources department enters employee information in the People window (if HRMS is installed), or the appropriate department enters employee information in the Enter Person window. To ensure that Payables can create a supplier record during Expense Report Import, the following are requirements for each employee record:
   - the employee name is unique
   - reimbursement address for either Home or Office exists
   - address lines 1-3 for the home address do not exceed 35 characters
   - City/State/Country does not exceed 25 characters
   - Zip Code for the home address does not exceed 20 characters
5. (Optional) In the Suppliers window, enter a supplier record for the employee. You don’t need to do this step if you complete steps 2 and 3, because the system creates supplier records automatically during Expense Report Import.

To link an existing supplier with an employee, in the Classification region of the Suppliers window, choose Employee as the Type, then enter either the employee name in the Employee Name field or the employee number in the Number field. (Payables creates this link automatically for any employee supplier records it creates during Expense Report Import.)

### Updating Employee Supplier Records

When employee records are updated, the associated supplier records are not automatically updated in the Suppliers and Supplier Sites windows. However, Payables updates employee type supplier records at two times:

- **Expense Report Import:**
  - Payables creates a new supplier record when you import the first expense report for an employee if the Payables option Automatically Create Employee as Supplier is enabled and if no supplier record already exists for the employee. The new supplier record is linked to the employee record, and the supplier record has a single pay site of either Home or Office, depending on which is selected in the Send To field on the expense report.
  
  - When Expense Report Import imports an expense report for an employee, if a supplier record already exists, then Payables ensures that the addresses of any existing Home or Office supplier sites match the employee record.

- **Employee Update Program:** You can submit this program at any time to update employee type supplier records from the corresponding employee records. The program updates the following information:
  - Supplier name (updated from employee name)
    
    **Tip:** The system links the supplier number with the employee number, so the link between the records is maintained even if the employee name and supplier name change. So if you want to query all records for any supplier, use the supplier number.
  
  - Supplier site address (updated from employee Home and location addresses)
  
  - Inactive On date for supplier, and for Home and Office supplier sites (updated if employment termination date has been entered)
Supplier Registration

Help Home, page 5-

Supplier companies must be defined and registered with the system to use any of the self-service applications. Once suppliers have been defined to the system, you can request that the supplier company register itself and begin using your self-service procurement applications.

There are several ways to request supplier registration:

• Suppliers can use the self-service registration feature to register themselves.

• Buyers can contact their suppliers and invite them to register by providing them with the URL of a page where the suppliers can register. Suppliers access the page and provide their company name, key tax identification details, and main company address using a registration page. In addition, a contact at the supplier must provide information so the system can send notifications.

• Sourcing buyers can include unregistered suppliers in the invitation of a negotiation. When the negotiation is published, a registration request is generated for that supplier (if the buyer has the appropriate authorizations, the supplier can be registered and approved at the same time).

Once the registration request is submitted, the system verifies the information against existing records to ensure that duplicate registration information is not recorded. The request is also routed to a buyer administrator for approval. Once approved, the system emails the company contact with information on how to access the system.

To approve a supplier registration request:

1. From the Suppliers page, click
   • New Supplier Requests for requests generated from Sourcing negotiations.
   • Prospective Supplier Registrations to process other registration requests.

2. On the New Supplier Requests and/or the Prospective Supplier Registrations pages, click the icon in the Review column to view the details of the registration request.

3. View the details of the request and click Approve to allow the registration.

Supplier User Registration and Maintenance

Help Home, page 5-

Supplier User Maintenance
You have the capability of controlling which supplier users can access your procurement system, what operations they can perform, and which data they can access. You can also maintain information on the supplier user in a user profile. Administrators at the supplier company can also update information for their users’ profiles. Any change to a user profile must by approved by a buyer administrator.

All supplier users must register with the system and have their registration requests approved before they can access your system.

- You can invite supplier users to register. A notification is sent to the supplier user that includes the URL of a page containing a registration form. Once the supplier user completes the form, a notification is sent to the buyer who initiated the invitation.

- If you know the required information for the user, you can submit a request on the user’s behalf.

- Regardless of how the registration request is initiated, all requests must be approved. When a buyer administrator approves the request, detailed access restrictions, both to applications and data, can be specified.

- Note additionally that administrators at supplier companies can request system access for a supplier user when creating an entry for that user in the company’s contact directory.

**Inviting Supplier Users**

Home Page, page 5-

Each supplier user that wishes to access your self-serve applications needs a user account. You can either register the supplier user directly, or you can invite the supplier user to submit a registration request. If you sent an invitation, the supplier user’s request must be approved by you or another authorized buyer administrator before the supplier user can access the system.

Anyone with the Supplier User Administrator or Sourcing Buyer responsibility can invite a supplier user to register.

The system only accepts one response per invitation, although the invitation isn’t restricted to the initial recipient. It can be forwarded to any user within an organization, who can then respond.

**To invite a supplier user to register:**

1. From the **Navigator** page, click "Invite Supplier User".

2. Use the magnifying icon to search for the supplier. When you are returned to the **Invite a Supplier User** page, the supplier name and number appear.

3. Enter the supplier user’s email address. This will be used by default as the userid.
4. Optionally enter a note is applicable.

5. Select the responsibilities to be granted to the user (these can be changed when the request is approved).

6. Click Invite.

The supplier user who receives the invitation can forward the invitation to another user in the same supplier company; the second user can complete the registration request. If you have a single contact within the supplier company, you can send multiple invitations to that contact’s email address to register multiple users for that supplier company.

**Note**

Anyone at a supplier company with the Supplier Profile and User Manager responsibility can submit registration requests for users at the company. These requests appear and require approval the same as responses to invitations.

**Registering Supplier Users**

Help Home, page 5-

If you know all the required information for a specific supplier user, you can register that user directly. This option requires no action from the supplier user. Anyone with the Sourcing Super User or Supplier User Administrator responsibilities can directly register supplier users.

**To register a supplier user:**

1. From the Navigator page, click "Register Supplier User."

2. Use the magnifying icon to search for the supplier. When you are returned to the Register a Supplier User page, the supplier name and number appear.

3. Enter the required user information. The user’s userid defaults to the email address, although you can give the user a different userid if you wish.

4. Select which responsibilities this user will be granted.

5. Specify security restrictions as appropriate. You can enable access at the supplier level (the user sees all information for all company sites), the sites level (the user sees information only for the designated company sites), or the contacts level (the user only sees information associated with one or more registered company contacts).

6. When finished, click Register. The supplier user is sent a notification indicating the pending registration. The buyer administrator is sent a notification indicating the requested approval.

**Approving Supplier Users**
Once registration requests are submitted, a buyer administrator must approve the request before the supplier user can access the system. Buyer administrators are sent notifications with details of the registration request. The request can then be reviewed and approved or rejected.

**To approve a registration request:**

1. In the Supplier User Administration responsibility click Approve Users and Manage User Profiles. In the Sourcing Super User responsibility, click Approve/Reject Supplier Users.

2. On the **Supplier User Profile Management** page, search for pending registrations.

3. Review the user’s information. You can update the supplier details if necessary (this is especially useful if the registration was completed by someone other than the initial invitee).

4. Click Approve or Reject.

**Note:** You can also approve a registration request made by a supplier user manager at a supplier company as part of the request to create a company contact. You use the Supplier Profile Administrator responsibility to accomplish this.

1. From the **Suppliers** home page, click “Supplier Contact Requests” in the To Do List section in the top right corner.

2. The **Supplier Profile Change Requests** table shows all pending updates to the contact directory.

3. Click pencil icon for any entry with a request type of "new contact."

4. View the details of the request.

5. Click Approve or Reject.

After a buying organization approves or rejects a registration, the supplier user is sent a notification. If the request was approved, the notification includes the URL at which the system can be accessed, as well as the username and a system-generated password, which must be changed during initial login.

**Updating a Supplier User’s Profile**

Once a supplier user’s profile has been created, it can subsequently be updated. Updates could include personal information such as mailing or phone numbers, or system information such as which applications this user can access. You must have the Supplier User Administrator responsibility to update a supplier user’s profile.

**To update a supplier user’s profile:**
1. From the **Navigator** page, click Approve Users and Manage User Profiles.

2. On the **Supplier User Profile Management** page, search approved registrations for the user whose profile you wish to update.

3. Click the View Details icon.

4. On the **Manage User Profile** page, update the user information as needed. Note that you can use this page to reset the user’s password. A system generated password is sent to the user.

5. When finished, click Apply.
Application Technology and Customizations

This chapter covers the following topics:

- Chapter Overview
- Customizing the Oracle iSupplier Portal User Interface

Chapter Overview

This chapter discusses the Oracle Applications Framework (OAF) technology on which Oracle iSupplier Portal is built and includes how to customize the Oracle iSupplier Portal user interface.

Customizing the Oracle iSupplier Portal User Interface

Oracle iSupplier Portal is built upon the OAF technology. There are many aspects of OAF applications that system administrators, developers, and end-users can personalize.

- Menus and Responsibilities - You can use the Menu and Responsibility forms to personalize and maintain security for Oracle Self-Service Web Applications. You can use the forms to assign specific responsibilities to your users and designate the menus that are available to the users of a given responsibility.

- FND Messages and Lookups - You can similarly use the Messages and Lookups forms to modify existing messages and lookups or define new messages and lookups. For example, you may have a need to create additional messages for display within an application that pertains to your users, or you may want to add new lookup values to a lookup type that are applicable to your site.

- Cascading Style Sheet (CSS) - You can also modify the visual presentation styles, such as fonts and colors, that appear in Oracle Self-Service Web Applications. The styles are controlled by cascading style sheets (CSS) to reinforce a standard look and feel throughout the applications. You can personalize the custom.xss style sheet
document to modify the existing styles to your needs.

• User Interface (UI) Definition Overlays and Saved Views Through the OA Personalization Framework - You can use the functionality of OA Personalization Framework to personalize the UI of an application page. Administrators can create personalizations that overlay the existing UI and are targeted to specific audiences. End-users can create personalizations and save them as personalized views from which they can choose to display as the need arises.

OA Framework includes the OA Personalization Framework which allows you to personalize your UI look-and-feel, layout, or visibility of page content appropriate or your business needs without modifying any underlying code.

Following are some common types of personalizations you can accomplish with OA Personalization Framework:

• Change the prompt for a field or other text on a page.

• Hide or show a field on a page.

• Reorder fields or items on a page.

• Restrict data that a user can access.

• Add new buttons, links, text items, images, etc.

• Restrict query results in a table.

  **Note:** With OA Personalization Framework, your personalizations are reflected immediately on the page.

For example, you may change the color scheme of your user interface, change the order in which table columns are displayed, or save personalized views of a query result and retrieve them at a later time.

To enable personalization for Oracle iSupplier Portal, you need to set the Personalize Self-Service Defn (FND_CUSTOM_OA_DEFINITION) system profile option to Yes. This profile can be set at the site, application, responsibility or user level.

When you set this profile option to Yes, a global Personalize button appears on the the top right corner of all Oracle iSupplier Portal application pages.
Oracle iSupplier Portal Personalization Link

This link takes the user to the corresponding OAF personalization page, where all personalization tasks can be done.

**Choose Personalization Context**

Choose the personalization context below by selecting a personalization value for each level.

<table>
<thead>
<tr>
<th>Scope</th>
<th>Function</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Page: Home Page</td>
<td>[Set to My Function]</td>
<td>[Set to My Location]</td>
</tr>
<tr>
<td>Personalize the region to be applied to all pages where the region exists.</td>
<td>Difficulty Level: Easy</td>
<td>Difficulty Level: Moderate</td>
</tr>
</tbody>
</table>

Site: Include

Organization: Vision Operations

Responsibility: Supplier Portal Full Access

The **Personalize** page is where you choose your personalizations. You can select your personalization context of shared regions from the Scope drop-down box.

You may search for and select your preferred function level. A function in Oracle Applications is a piece of application logic or functionality that is registered under a unique name for the purpose of assigning it to, or excluding it from, a responsibility. For example, a single region can be assigned to multiple functions, such that you can display the region from different menus on the responsibility menu tree. You can create personalizations for a region at the function level, such that the personalizations are visible only when you display the region by selecting a specific function. For example, suppose you have an updatable region and you want that region to be updatable when accessed from Function A in the menu, but to be read-only when accessed from Function B in the menu. To accomplish this, you create a function level personalization that makes all the fields read-only for Function B. You can have only one set of personalizations per region per function.

You may search for and select your preferred location.

Suppose you need to:

- Distribute to a particular location.
- Hide certain fields or buttons.
- Change labels to accommodate that location.
You can make those changes by creating location-level personalizations in the relevant regions. All end-users for the specific location will see the applied location personalizations.

A site refers to an installation of Oracle Self-Service Web Applications. Personalizations that you make at the site level affect all users of the current installation. For example, as a system administrator, you might want to make a site-level personalization where you change the table column labels to match your corporate standards. You can only save one set of personalizations per region per site.

Personalizations that you make at the organization level affect all users of that organization. For example, you might make a personalization at the organization level for a specific organization to hide certain fields because they are not pertinent to the context of that organization. You can only save one set of personalizations per region per organization.

A responsibility represents a specific level of authority within an application. Each responsibility lets you access specific functions or a set of product windows, menus, reports, and data to fulfill your role in an application. When you make personalizations at the responsibility level for a specific responsibility, the changes are effective only for the users of that responsibility. You can only save one set of personalizations per region per responsibility.

Remember to click Apply when you finalize your personalizations. After searching for and selecting the appropriate context, you can individually set personalization context by clicking Set to My Function.

For a detailed list of current functionality available through OAF personalization framework, and personalization features, see the Personalization section of the Oracle Applications Framework Personalization Guide, available on Oracle MetaLink.
Chapter Overview

Oracle iSupplier Portal uses Oracle Workflow technology to provide a guided walk-through of business processes and to generate notifications. Oracle Workflow Builder is a graphical tool for creating, viewing, and modifying workflow process definitions. It contains a Navigator window that you use to define the activities in a process window to process a diagram.

For more information on Oracle Workflow, see Overview of Oracle Workflow in the Oracle Workflow Guide.

Oracle iSupplier Portal uses the following workflows:

- Supplier Change Order Workflow
- Update Capacity Workflow
- Order Modifiers Workflow
- Advance Shipment Notice (ASN) Workflow
- Purchase Order Acknowledgement (handled by PO Approval Workflow)

Customizing Oracle iSupplier Portal Workflows

The Oracle Workflow Builder is used to customize workflows. When workflows are customized, only those business flows that are submitted after the customization are affected.

The Oracle Workflow Builder is also used to create unique approval workflows for each document type in your organization. Particular workflows are associated with certain document types in the Document Type window.
Notifications

All notifications can be modified to meet your individual business needs. However, if the notification has a reply code, you should verify that the Result Type of your customized notification matches the transitions in the workflow diagram.

For more information on creating notifications, see the Oracle Workflow Guide.

Function Activities

You cannot modify any function activity in the Oracle iSupplier Portal workflow. However, you can replace some function activities with function activities of your own. When you replace a function activity, you are modifying the process where it is contained. If you substitute default action activities in a process with function activities that you create, you must remember the following:

• The result type of your new function activity must match the result type of the default activity. For example, a Result Type of Yes or No needs to match the result type that you specify in that function activity’s corresponding PL/SQL procedure.

• If you have two results (such as Yes and No) in your function activity and corresponding PL/SQL procedure, you need to verify that there are two corresponding transitions in the workflow diagram (one for Yes and one for No). If you alter the result types and transitions in a process, be careful that you are not deleting or bypassing any special transitions or checks.

Messages

You can modify all of the messages to meet your individual business needs.

Lookup Types

You can modify all the lookup types to meet your individual business needs.

Note: If you change a lookup type, verify that all activities that use the lookup type allow the change. For example, if you change the lookup type from Yes/No to something else, the activities that use that lookup type should also change their Result Type from Yes/No to whatever new lookup type you created.

For more information on Lookup Types see the Oracle Workflow Guide.
Supplier Change Order Workflow

The supplier change order workflow handles change requests made by the supplier and the buyer’s response to those change requests, as well as implements the business rules pertaining to the supplier's change request and the buyer's response. A supplier can login to Oracle iSupplier Portal and can request for a change or do so through XML.

The supplier change order workflow supports changes on fields such as promised date, quantity ordered, unit price, supplier item, additional changes, split shipments, and acknowledgement of shipments. All change requests made by the supplier need to be approved or rejected by the buyer.

The supplier change order workflow processes the change request and sends a notification to the buyer about the supplier’s intention to change the purchase order. Once the buyer responds to the purchase order, the response is processed. As part of processing the response, the workflow calls the appropriate procedures to update the existing purchase order and sends out the response notification to the supplier. All the notifications are generated dynamically according to the receiver’s language preference.
Supplier Change Order Workflow Main Process

In this process, the workflow receives a change request and sends a notification to the buyer.

Depending on the type of change requests, workflow decides if the change requires an approval or not. If the change is to the promised date, quantity, price, or shipment amount, the change request needs an approval. If the change request is for some additional information (FT Terms), it does not need any approval. In such cases, the workflow sends a notification. The buyer can respond through e-mail, through the notification, or through Oracle iSupplier Portal. Once the buyer response is received, the change PO API is called to update the purchase order, then the PO Approval workflow is initiated.
### Supplier Change Order Workflow Main Process

```
<table>
<thead>
<tr>
<th>Number</th>
<th>Function/Notification Name</th>
<th>Package Procedure</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ANY_NEW_SUP_CHANGE</td>
<td>PO_SUP_CHG_REQ</td>
<td>Checks to see if there is a change request and whether it needs approval.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>QUEST_WF_GRP:ANY_NEW_SUP_CHN</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>NOTIFY_REQ_PLAN</td>
<td>PO_SUP_CHG_REQ</td>
<td>Notify the planner and requester about the change request.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>QUEST_WF_GRP:NOTIFY_REQ_PLAN</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>IS_PRORATE_NEEDED</td>
<td>PO_SUP_CHG_REQ</td>
<td>Checks to see if the change request has an effect on other POs releases, and decides whether it needs approval or not.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>QUEST_WF_GRP:IS_PRORATE_NEEDED</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>FYI_BUYER_SUP_ACT</td>
<td>FYI to Buyer of Supplier Change (Message)</td>
<td>Notification to buyer which does not need any approval.</td>
</tr>
<tr>
<td>5</td>
<td>NOTIFY_BUYER_OF_CHN</td>
<td>Notify Buyer Of Change (Message)</td>
<td>Notification to the buyer which needs approval.</td>
</tr>
</tbody>
</table>
```
<table>
<thead>
<tr>
<th>Number</th>
<th>Function/Notification Name</th>
<th>Package Procedure</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>BUYER_ACC_CHN</td>
<td>PO_SUP_CHG_REQ</td>
<td>Buyer has accepted the change. Record the event.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>USER_WF_GRP.BUYER_ACCEPT_CHANGE</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>PROCESS_RESPONSE</td>
<td>PO_SUP_CHG_REQ</td>
<td>Handover the change request to PO Approval workflow for further processing.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>USER_WF_GRP.PROCESS_RESPONSE</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>BUYER_REJ_CHN</td>
<td>PO_SUP_CHG_REQ</td>
<td>Buyer has rejected the change request.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>USER_WF_GRP.BUYER_REJECT_CHANGE</td>
<td></td>
</tr>
</tbody>
</table>

**Receive Supplier Change Event Workflow**

This workflow receives and processes the response to a change request. This process is triggered from PO Approval workflow once the change is approved (accepted or rejected).

This process checks if there is any acknowledgement required by the supplier and updates the PO Acceptances accordingly. It then sends a notification to the supplier about the buyer’s response. The process also checks to see if the change request came through inbound XML, and if so, triggers another event to send the response in XML format.
Receive Supplier Change Event Workflow

<table>
<thead>
<tr>
<th>Number</th>
<th>Function/Notification Name</th>
<th>Package Procedure</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>RECEIVE_SUP_CHN_EVT</td>
<td>Receive Supplier Change PO Event oracle.apps.po.event.supplier_change</td>
<td>Receive the response.</td>
</tr>
<tr>
<td>2</td>
<td>IS_PO_APPROVED_BY_HIE</td>
<td>PO_SUP_CHG_REQ_USER_WF_GRP.is_po_approved_by_hie</td>
<td>Check to see if the change request was approved by the approval hierarchy.</td>
</tr>
<tr>
<td>3</td>
<td>DOES_PO_REQ_SUP_ACK</td>
<td>PO_SUP_CHG_REQ_USER_WF_GRP.DOES_PO_REQ_SUP_ACK</td>
<td>If the change requested by the approval hierarchy, check to see if there further changes made and if supplier needs to acknowledge.</td>
</tr>
<tr>
<td>4</td>
<td>NOTIFY_SUP_FINAL_CHN_RESULTS</td>
<td>Notify Supplier of Change's Final Result (Message)</td>
<td>Notification to the buyer which needs approval.</td>
</tr>
<tr>
<td>Number</td>
<td>Function/Notification Name</td>
<td>Package Procedure</td>
<td>Comments</td>
</tr>
<tr>
<td>--------</td>
<td>----------------------------</td>
<td>-------------------</td>
<td>----------</td>
</tr>
<tr>
<td>5</td>
<td>CARYY_SUP_ACK_TO_NEW_REV</td>
<td>PO_SUP_CHG_REQ</td>
<td>See if the change request was made as part of acknowledgement and if so let it reflect on the new version of the PO.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>USER_WF_GRP.CAR</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>RY_SUP_ACK_TO_N</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>EW_REV</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>IS_XML_CHNG_REQ_SOURCE</td>
<td>PO_SUP_CHG_REQ</td>
<td>Check to see if the change request came through XML.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>USER_WF_GRP.IS_X</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>ML_CHN_REQ_SOU</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>SET_RAISE_EVENT_DATA</td>
<td>PO_SUP_CHG_REQ</td>
<td>If the change request came through XML, set all the necessary information required for the XML generation.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>USER_WF_GRP.set_d</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>ata_chn_rep_evt</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>RAISE_SUPP_CHN_RESP-1</td>
<td>Supplier Change request responded (Event oracle.apps.po.event_suppchnresp).</td>
<td>Raise an event to indicate the change request has been responded</td>
</tr>
</tbody>
</table>

Send Change Responded Notification to the Supplier Workflow

This process handles the case when a change request is not processed through PO Approval workflow, for example, cancellations or rejections. This process is triggered by the Process_Response activity in the Main Process.
Send Change Responded Notification to the Supplier Workflow

<table>
<thead>
<tr>
<th>Number</th>
<th>Function/Notification Name</th>
<th>Package Procedure</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NOTIFY_SUP_CHG_RESPONDEDN</td>
<td>Notify Supplier</td>
<td>Send a notification to the supplier about the response.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Changes are</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Responded (Message)</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>CHG_STATUS_TO_APPROVED</td>
<td>PO_SUP_CHG_REQ</td>
<td>Update the change request's status.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>REQUEST_WF_GRP.CHG</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>_STATUS_TO_APPROVED</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>IS_XML_CHN_REQ_SOURCE</td>
<td>PO_SUP_CHG_REQ</td>
<td>Check to see if the change request came through XML.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>REQUEST_WF_GRP.IS_XML_CHN_REQ_SOURCE</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>SET_RAISE_EVENT_DATA</td>
<td>PO_SUP_CHG_REQ</td>
<td>Set some information required for the receivers of change responded event.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>REQUEST_WF_GRP.set_data_chn RESP_EVT</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>RAISE_SUPP_CHN_RESP</td>
<td>Supplier Change</td>
<td>Event to indicate that the change request has been responded.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>request responded</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>(eventoracle.apps.po.event.suppchnresp)</td>
<td></td>
</tr>
</tbody>
</table>

Send Notification to Planner About Supplier's Change Request Workflow

This process is triggered by the NOTIFY_REQ_PLAN activity in the Main Process. This process sends a notification to the planner about the change request.
Send Notification to the Planner About Supplier's Change Request Workflow

Send Notification to the Planner About Supplier's Change Request Flow: Processes and Notifications

<table>
<thead>
<tr>
<th>Number</th>
<th>Function/Notification Name</th>
<th>Package Procedure</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NOTIFICATION_PLAN_SUP_CHN</td>
<td>Notification for Planner of Supplier Change</td>
<td>Notification to planners about the supplier's change request.</td>
</tr>
</tbody>
</table>

Send Notification to Requester About Supplier's Change Request Workflow

This process is triggered in the NOTIFY_REQ_PLAN activity in the Main Process.

Send Notification to Requester About Supplier's Change Request Workflow

START NOTIFICATION_REQ_SUP_CHN END
Send Notification to the Requester About Supplier’s Change Request Workflow: Processes and Notifications

<table>
<thead>
<tr>
<th>Number</th>
<th>Function/Notification Name</th>
<th>Package Procedure</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NOTIFICATION_REQ_SUP_CHNр</td>
<td>Notify Requester of Change by Supplier</td>
<td>Notify the requester about the change request by the supplier.</td>
</tr>
</tbody>
</table>

Update Capacity Workflow

A supplier can accurately maintain your delivery capacity online. Buying companies can allocate planned orders taking into account your changes to the capacity constraints. This provides more accuracy and flexibility in making sourcing allocations during the organization’s planning, scheduling, and procurement processes.

If a supplier is an approved supplier, they can update capacity abilities for various items. Suppliers can also define tolerance fences by Days in Advance and Tolerance Percent on the Maintain Capacity page. Once the updates are submitted, the buying company’s buyer is notified and their approved supplier list is updated with this information. The buying company can then allocate planned orders taking allocation and current capacities into account.

Suppliers can update the following capacity constraints for each item sourced to you:

- Processing lead time
- Order modifiers: minimum order quantity and fixed lot multiple
- Capacity per day for a range of effective date
- Tolerance fences: tolerance percentage and days in advance

The purpose of this workflow is to allow the planner and buyer to have approval control over the updates and to inform all pertinent user throughout the process.

The Update Capacity workflow is contained in the file POSUPDNT.wft under $pos/patch/115/import/US.
The following profile defined at the SYSTEM Level is used to control who (if any) is the approver for the order modifier and update capacity changes being made by the supplier:

- POS: ASL planning attribute updates from supplier approved by (POS_ASLS ModiF_APPR_REQD_BY)

- NONE

- BUYER

- PLANNER
**Main Process for Update Capacity Workflow**

![Workflow Diagram]

**Update Capacity Workflow: Processes and Notifications**

<table>
<thead>
<tr>
<th>Number</th>
<th>Function/Notification Name</th>
<th>Package Procedure</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>INIT_ATTRIBUTES</td>
<td>POS_UPDATE_CAPACITY_PKG. INIT_ATTRIBUTES</td>
<td>Initialize Attributes.</td>
</tr>
<tr>
<td>2</td>
<td>GET_BUYER_NAME</td>
<td>POS_UPDATE_CAPACITY_PKG. GET_BUYER_NAME</td>
<td>Get Buyer Name.</td>
</tr>
<tr>
<td>3</td>
<td>GET_PLANNER_NAME</td>
<td>POS_UPDATE_CAPACITY_PKG. GET_PLANNER_NAME</td>
<td>Get Planner Name.</td>
</tr>
<tr>
<td>Number</td>
<td>Function/Notification Name</td>
<td>Package Procedure</td>
<td>Comments</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------</td>
<td>-------------------</td>
<td>----------</td>
</tr>
<tr>
<td>4</td>
<td>BUYER_APPROVAL_REQUIRED</td>
<td>POS_UPDATE_CAPACITY_PKG, BUYER_APPROVAL_REQUIRED</td>
<td>Does the Updates Require Buyer's Approval?</td>
</tr>
<tr>
<td>5</td>
<td>PLANNER_APPROVAL_REQUIRED</td>
<td>POS_UPDATE_CAPACITY_PKG, PLANNER_APPROVAL_REQUIRED</td>
<td>Does the Updates Require Planner's Approval?</td>
</tr>
<tr>
<td>6</td>
<td>UPDATE_MAIN_TABLE</td>
<td>POS_UPDATE_CAPACITY_PKG, UPDATE_ASLS</td>
<td>Update ASL.</td>
</tr>
<tr>
<td>7</td>
<td>GET_BUYER</td>
<td>POS_UPDATE_CAPACITY_PKG, BUYER_EXIST</td>
<td>Does Buyer Exist?</td>
</tr>
<tr>
<td>8</td>
<td>INFORM_BUYER_OF_UPDATE_FYI</td>
<td>Inform Buyer/Planner of Capacity Updates</td>
<td>Inform Buyer of Updates.</td>
</tr>
<tr>
<td>9</td>
<td>GET_PLANNER</td>
<td>POS_UPDATE_CAPACITY_PKG, PLANNER_EXIST</td>
<td>Does Planner Exist?</td>
</tr>
<tr>
<td>10</td>
<td>BUYER_PlANNER_SAME_PERSON</td>
<td>POS_UPDATE_CAPACITY_PKG, BUYER_SAME_AS_PLANNER</td>
<td>Are the buyer and the planner same person?</td>
</tr>
<tr>
<td>11</td>
<td>INFORM_PLANNER_OF_UPDATES_FYI</td>
<td>Inform Buyer/Planner of Capacity Updates</td>
<td>Inform Planner of Updates.</td>
</tr>
<tr>
<td>12</td>
<td>GET_PLANNER</td>
<td>POS_UPDATE_CAPACITY_PKG, PLANNER_EXIST</td>
<td>Does Planner Exist?</td>
</tr>
<tr>
<td>13</td>
<td>NOTIFY_PLANNER_OF_UPDATES</td>
<td>Notify Approver of Updates</td>
<td>Notify Planner of Updates.</td>
</tr>
<tr>
<td>Number</td>
<td>Function/Notification Name</td>
<td>Package Procedure</td>
<td>Comments</td>
</tr>
<tr>
<td>--------</td>
<td>-------------------------------------------</td>
<td>------------------------------------------</td>
<td>-------------------------------</td>
</tr>
<tr>
<td>14</td>
<td>CHECK_DEFAULT_MODE</td>
<td>POS_UPDATE_CAPACITY_PKG. DEFAULT_APPROVAL_MODE</td>
<td>Check Default Approval Mode.</td>
</tr>
<tr>
<td>15</td>
<td>UPDATE_TEMP_TABLE</td>
<td>POS_UPDATE_CAPACITY_PKG. UPDATE_STATUS</td>
<td>Update status of the temp table.</td>
</tr>
<tr>
<td>16</td>
<td>NOTIFY_SUPPLIER_OF_REJECTION</td>
<td>Notify Supplier of Rejection</td>
<td>Notify Supplier of Rejection.</td>
</tr>
<tr>
<td>17</td>
<td>GET_BUYER</td>
<td>POS_UPDATE_CAPACITY_PKG. BUYER_EXIST</td>
<td>Does Buyer Exist?</td>
</tr>
<tr>
<td>18</td>
<td>NOTIFY_BUYER_OF_UPDATES</td>
<td>Notify Approver of Updates</td>
<td>Notify Buyer of Updates.</td>
</tr>
<tr>
<td>19</td>
<td>UPDATE_MAIN_TABLE</td>
<td>POS_UPDATE_CAPACITY_PKG. UPDATE_ASL</td>
<td>Update ASL.</td>
</tr>
<tr>
<td>20</td>
<td>GET_PLANNER</td>
<td>POS_UPDATE_CAPACITY_PKG. PLANNER_EXIST</td>
<td>Does Planner Exist?</td>
</tr>
<tr>
<td>21</td>
<td>INFORM_PLANNER_OF_UPDATES_FYI</td>
<td>Inform Buyer/Planner of Capacity Updates</td>
<td>Inform Planner of Updates.</td>
</tr>
<tr>
<td>22</td>
<td>NOTIFY_SUPPLIER_OF_ACCEPTANCE</td>
<td>Notify Supplier of Acceptance</td>
<td>Notify Supplier of Acceptance.</td>
</tr>
</tbody>
</table>

**Order Modifiers Workflow**

Maintaining order modifiers enables you to view and make changes to the details of a purchase orders scheduled for delivery. You can view shipment processing lead times, minimum order quantities, and fixed lot multiples, all which can be adjusted to fit a supplier's delivery ability. You can make updates or modifications to manufacturing capacity, over capacity tolerance, and order modifier data such as Processing Lead Time, Minimum Order Quantity and Fixed Lot Multiple.
The purpose of this workflow is to allow the planner and buyer to have approval control over the updates and to inform all pertinent user throughout the process.

The Order Modifiers workflow is contained in the file POSORDNT.wft under $pos/patch/115/import/US.

**Order Modifiers Workflow**

![Workflow Diagram](image)

The following profile defined at the SYSTEM Level is used to control who (if any) is the approver for the order modifier and update capacity changes being made by the supplier:

- POS: ASL planning attribute updates from supplier approved by 
  (POS_ASL_MOD_APPR_REQD_BY )
Main Process for Order Modifiers Workflow

Order Modifiers Workflow: Processes and Notifications

<table>
<thead>
<tr>
<th>Number</th>
<th>Function/Notification Name</th>
<th>Package Procedure</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>INIT_ATTRIBUTES</td>
<td>POS_UPDATE_CAPACITY_PKG. INIT_ATTRIBUTES</td>
<td>Initialize Attributes.</td>
</tr>
<tr>
<td>2</td>
<td>GET_BUYER_NAME</td>
<td>POS_UPDATE_CAPACITY_PKG. GET_BUYER_NAME</td>
<td>Get Buyer Name.</td>
</tr>
<tr>
<td>Number</td>
<td>Function/Notification Name</td>
<td>Package Procedure</td>
<td>Comments</td>
</tr>
<tr>
<td>--------</td>
<td>-----------------------------</td>
<td>-------------------</td>
<td>----------</td>
</tr>
<tr>
<td>3</td>
<td>GET_PLANNER_NAME</td>
<td>POS_UPDATE_CAPACITY_PKG, GET_PLANNER_NAME</td>
<td>Get Planner Name.</td>
</tr>
<tr>
<td>4</td>
<td>BUYER_APPROVAL_REQUIRED</td>
<td>POS_UPDATE_CAPACITY_PKG, BUYER_APPROVAL_REQUIRED</td>
<td>Does the Updates Require Buyer's Approval?</td>
</tr>
<tr>
<td>5</td>
<td>PLANNER_APPROVAL_REQUIRED</td>
<td>POS_UPDATE_CAPACITY_PKG, PLANNER_APPROVAL_REQUIRED</td>
<td>Does the Updates Require Planner's Approval?</td>
</tr>
<tr>
<td>6</td>
<td>UPDATE_MAIN_TABLE</td>
<td>POS_UPDATE_CAPACITY_PKG, UPDATE_AS, L</td>
<td>Update ASL.</td>
</tr>
<tr>
<td>7</td>
<td>GET_BUYER</td>
<td>POS_UPDATE_CAPACITY_PKG, BUYER_EXIST</td>
<td>Does Buyer Exist?</td>
</tr>
<tr>
<td>8</td>
<td>INFORM_BUYER_OF_UPDATE_FYI</td>
<td>Inform Buyer/Planner of Capacity Updates</td>
<td>Inform Buyer of Updates.</td>
</tr>
<tr>
<td>9</td>
<td>GET_PLANNER</td>
<td>POS_UPDATE_CAPACITY_PKG, PLANNER_EXIST</td>
<td>Does Planner Exist?</td>
</tr>
<tr>
<td>10</td>
<td>BUYER_PLANNERSAME_PERSON</td>
<td>POS_UPDATE_CAPACITY_PKG, BUYER_SAME_AS_PLANNER</td>
<td>Are the buyer and the planner same person?</td>
</tr>
<tr>
<td>11</td>
<td>INFORM_PLANNER_OF_UPDATES_FYI</td>
<td>Inform Buyer/Planner of Capacity Updates</td>
<td>Inform Planner of Updates.</td>
</tr>
<tr>
<td>12</td>
<td>GET_PLANNER</td>
<td>POS_UPDATE_CAPACITY_PKG, PLANNER_EXIST</td>
<td>Does Planner Exist?</td>
</tr>
<tr>
<td>Number</td>
<td>Function/Notification Name</td>
<td>Package Procedure</td>
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<td>NOTIFY_PLANNER_OF_UPDATES</td>
<td>Notify Approver of Updates</td>
<td>Notify Planner of Updates.</td>
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<td>CHECK_DEFAULT_MODE</td>
<td>POS_UPDATE_CAPACITY_PKG. DEFAULT_APPROVAL_MODE</td>
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<td>15</td>
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<td>Notify Buyer of Updates.</td>
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<td>POS_UPDATE_CAPACITY_PKG. UPDATE_ASL</td>
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<td>20</td>
<td>GET_PLANNER</td>
<td>POS_UPDATE_CAPACITY_PKG. PLANNER_EXIST</td>
<td>Does Planner Exist?</td>
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<tr>
<td>21</td>
<td>INFORM_PLANNER_OF_UPDATES_FYI</td>
<td>Inform Buyer/Planner of Capacity Updates</td>
<td>Inform Planner of Updates.</td>
</tr>
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<td>22</td>
<td>NOTIFY_SUPPLIER_OF_ACCEPTANCE</td>
<td>Notify Supplier of Acceptance</td>
<td>Notify Supplier of Acceptance.</td>
</tr>
</tbody>
</table>

**Create ASN Workflow**

The workflow related components in Create ASN flow are sending the notifications for ASN Creation and ASN Cancellation. This workflow has been defined in the file $pos/patch/115/import/US/posasnnb.wft
Create ASN Workflow
Notification to Buyer of ASN Creation

Notification to Buyer of ASN Creation Workflow: Processes and Notifications

<table>
<thead>
<tr>
<th>Number</th>
<th>Function/Notification Name</th>
<th>Package Procedure</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SET_BUYER_USERNAME</td>
<td>POSASNNOTIGATASNBUYERS</td>
<td>Get Buyer Username</td>
</tr>
<tr>
<td>2</td>
<td>DUMMY</td>
<td>POSASNNOTIFESTNEXTBUYER</td>
<td>Set Next Buyer</td>
</tr>
<tr>
<td>3</td>
<td>NOTIFYBUYER</td>
<td>Notify Buyer of ASN Submission</td>
<td>Notify Buyer of ASN Submission</td>
</tr>
</tbody>
</table>
Notification to Buyer of ASN Cancellation

Notify Buyer of ASN Cancellation Workflow: Processes and Notifications

<table>
<thead>
<tr>
<th>Number</th>
<th>Function/Notification Name</th>
<th>Package Procedure</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SET_BUYER_USERNAME</td>
<td>POS ASN NOTIF:GET ASN BUYERS</td>
<td>Get Buyer Username</td>
</tr>
<tr>
<td>2</td>
<td>DUMMY</td>
<td>POS ASN NOTIF:SET NEXT BUYER</td>
<td>Set Next Buyer</td>
</tr>
<tr>
<td>3</td>
<td>NOTIFY BUYER</td>
<td>Notify Buyer of ASN Cancellation</td>
<td>Notify Buyer of ASN Cancellation</td>
</tr>
</tbody>
</table>

Purchase Order Acknowledgement Workflow

The notifications sent to the supplier and buyer for Purchase Order Acknowledgement are handled as part of PO Approval Workflow.

For detailed description of PO Approval Workflow, see the Oracle Purchasing Implementation Guide.