Oracle® iSupplier Portal

User's Guide

Release 12

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Oracle iSupplier Portal User's Guide , Release 12

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Preface

Intended Audience

Welcome to Release 12 of the *Oracle iSupplier Portal User's Guide* .

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

TTY Access to Oracle Support Services

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Structure

Related Information Sources

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.

1

Introduction to Oracle iSupplier Portal

Overview

Oracle iSupplier Portal enables a buying company to communicate key procure-to-pay information with suppliers. As a supplier using Oracle iSupplier Portal, you can view and acknowledge purchase orders, submit change requests, create advance shipment notices, view receipts, view inventory levels, view invoices and payments, create work confirmation for complex work projects, and acknowledge purchase order change requests. As a buyer using Oracle iSupplier Portal, you can view order, shipment, receipt, invoice, and payment information.

This section is an introduction to Oracle iSupplier Portal, and includes the following topics:

About Oracle iSupplier Portal

Oracle iSupplier Portal is a collaborative application that enables buying companies and their suppliers to communicate with each other. It enables suppliers to have real-time access to information (such as purchase orders and delivery schedules) and respond to the buying company with order acknowledgments, change requests, shipment notices, and planning details. It also allows buying organizations to search for order, shipment, receipt, invoice, and payment information across all suppliers and all business units, as well as respond to supplier change requests.

> **Note:** Oracle iSupplier Portal supports both transaction documents and view-only documents. Using transaction documents, you can submit acknowledgments or change requests on a Purchase Order, or initiate transactions such as advance shipment notices, advanced shipment

billing notices, and invoices. Using view-only documents, you may view forecast schedules and payments.

How to Use This Guide

This guide is organized to help you learn, use, and understand Oracle iSupplier Portal.

Getting Started Information

Introduction to Oracle iSupplier Portal

Explains how you get started using Oracle iSupplier Portal. This chapter includes details of where you start using the system depending on your current relationship with the buying company.

Registration

Explains how to register your company with the buying company and how to get Oracle iSupplier Portal user accounts for your employees. If you already have access to Oracle iSupplier Portal, then you do not need to read this chapter.

Navigating and Searching

Explains how to navigate through the system. The chapter also includes searching tips and techniques.

Transaction and View-Only Document Information

Order Information

Explains how to view and respond to order-related documents such as purchase orders, work orders, and supplier agreements.

Shipping Information

Explains how to access shipping information and create advance shipment notices (ASNs or ASBNs). The chapter also includes information on viewing receiving and quality transactions.

Planning and Inventory Information

Explains how to access planning and inventory information, as well as how to maintain item and capacity information.

Invoice and Payment Information

Explains how to access invoice and payment information. The chapter also includes information on how to submit invoices if the buying company has Oracle Payables installed.

Profile Information

Supplier Profile Management

Explains how to maintain information about your company using the Supplier Profile Management feature. You must have the proper authorizations to access the profile management pages.

Buying Company View Information

Buying Company View

Explains the buying company view of iSupplier Portal.

Where to Start

Before you can access Oracle iSupplier Portal:

1. Your company must be registered as a supplier to the buying company that has licensed Oracle iSupplier Portal.

2. You must be registered as an Oracle iSupplier Portal user.

   Note: If you are already a supplier to the buying company and you can log into Oracle iSupplier Portal, then you and your company have already completed both of the registration tasks. You can skip chapter 2. If you do not have access to Oracle iSupplier Portal, see chapter 2 for registration instructions.

After you are registered, you can access Oracle iSupplier Portal. The tasks you perform on Oracle iSupplier Portal are determined by your current supply chain business relationship with the buying company. The tables below list the tasks you will likely perform; where you start depends on what you want to accomplish:

If the buying company has ordered goods or services from you, you can

Tasks	Where Documented
View existing orders from your buying company, including any attachments.	See Order Information
Acknowledge and submit change requests to purchase orders.	See Order Information

Tasks	Where Documented
Submit your electronic signature while acknowledging a purchase order.	See Order Information
View and print Portable Document Format (PDF) versions of purchasing documents, including blanket agreements, clauses and other contract terms.	See Order Information
View your current purchase agreements (if any) with the buying company.	See Order Information
View an audit trail of any revisions for a purchase order.	See Order Information
Manage deliverables assigned to you (available only if the buying company has implemented Oracle Procurement Contracts).	See Order Information
Create work confirmations to notify the buying company of expected payment related to a completed unit of work for a complex work project.	See Order Information
View timecard information (available only if the buying company has implemented Oracle Services Procurement and Oracle Time and Labor).	See Order Information
Let your buying company know that goods are ready for shipment by uploading a routing request.	See Shipping Information
View buying company's response to your routing request.	See Shipping Information
Alert the buying company of any upcoming deliveries by sending advance shipment notices (ASN) or advance shipment billing notices (ASBN).	See Shipping Information
Upload advance shipment notices (ASN) or advance shipment billing notices (ASBN) to the system using spreadsheet functionality.	See Shipping Information

Tasks	Where Documented
View and enter item quality results and check for correspondence from the buying company (available only if the buying company uses Oracle Quality).	See Shipping Information
View receipts, returns, and delivery performance.	See Shipping Information

If you have already made a shipment to the buying company, you can:

Tasks	Where Documented
View invoices and received payments.	See Invoice and Payment Information
Submit invoices by selecting a purchase order and direct-billing the buying company (available only if the buying company uses Oracle Payables).	See Invoice and Payment Information

If you require a third-party shipment before you can complete the buying company's order, you can:

Task	Where Documented
View work orders to check the status of third-party (outside processing) orders or shipment plans.	See Order Information and Shipping Information

If you want to view and update your inventory information, you can:

Tasks	Where Documented
View item inventory levels.	See Planning and Inventory Information
Maintain item attributes, such as delivery capacity and lead times.	See Planning and Inventory Information

Tasks	Where Documented
Enter capacity information and view on-hand delivery items.	See Planning and Inventory Information
Define inventory lead times and order modifiers.	See Planning and Inventory Information
View vendor managed inventory items (if items are set up as a vendor managed items) and generate supply requests to manage reorder points and replenishments	See Planning and Inventory Information
View consigned inventory stock and view transactions associated with that stock.	See Planning and Inventory Information

If you want to view forecast demand so you can evaluate your supply plans, you can:

Task	Where Documented
View forecast schedules.	See Planning and Inventory Information
View a summary of forecast schedules.	See Planning and Inventory Information

If you want to update your company's profile information, you can:

Task	Where Documented
Enter address book information, contact directory information, business classifications, and products and services you provide. You can also enter and maintain bank account and address information, as well as payment and invoicing methods. You can enter and maintain information on user accounts.	See Supplier Profile Management

If you want to negotiate to supply goods to the buying company, you can:

Task	Where Documented
View buyer requests for quotes (RFQs).	See RFQs

If you are a buyer, you can:

Task	Where Documented
View order, shipment, receipt, invoice, and payment information.	See Buyer information
Search for order, shipment, receipt, invoice, and payment information across all suppliers and all business units.	See Buyer information
Respond to supplier change requests.	See Buyer information

2

Registration

This chapter covers the following topics:

- Overview
- SupplierregistrationRegistering Suppliers
- Supplieruser registrationRegistering Users

Overview

You register your company as a prospective supplier in Oracle iSupplier Portal to let the buying company know that you are interested in establishing a business relationship. After you are registered, additional supplier users within your company can be registered to access and use Oracle iSupplier Portal. This enables you to communicate to a buying company real-time information about your procure-to-pay transactions.

> **Note:** If you are already a supplier to the buying company and you can log into Oracle iSupplier Portal, then you and your company have already completed both of the registration tasks. You can skip chapter 2.

> **Note:** If no one in your company can access Oracle iSupplier Portal, your company is not registered with the buying company, and you need to register your company before you register your supplier users.

> **Note:** If other supplier users in your company can access Oracle iSupplier Portal (and you cannot), your company is registered, however, you need to register as a user for access to Oracle iSupplier Portal.

If you are a prospective supplier, you need to read the entire section and complete all of the registration steps. If your company is already registered with the buying company and you only need to add yourself as a user, you only need to read and complete the Registering Users task.

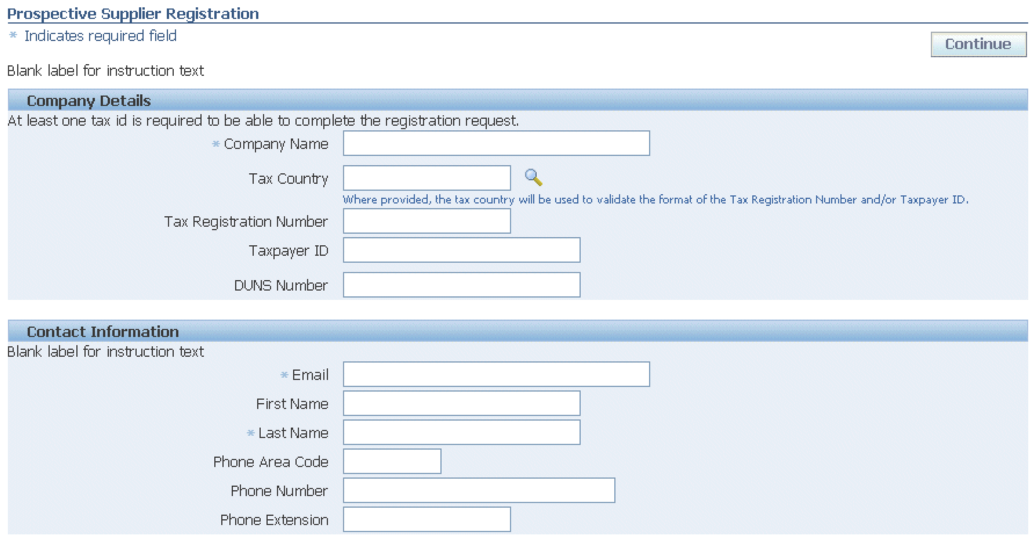
This section includes the following topics:

Registering Suppliers

Self-service prospective vendor registration enables you to register your interest in establishing a business relationship with the buying company. Once registered, you can provide details about your company, its addresses, contacts, products and services, and banking and payment information.

To register, you need to provide your company name, tax identification details, and main company address. This information is verified against existing records to ensure that duplicate registration information is not recorded. You can also include additional detailed information to create a company profile. If the buying company wishes you to enter into a relationship with them, they may send you an invitation requesting you register with the system. This notification will contain a URL where you can go and access the Supplier Registration Page. If the buyer does not send you an invitation, you must obtain this URL from the buying company yourself. Either way, you enter details about your company using the Supplier Registration Page.

Supplier Registration Page



You must provide contact information so the system can send updates on the registration request. After completing the registration, you receive a confirmation that the request has been submitted for review. The information is reviewed by a buyer administrator, and if approved, you are notified of the decision by e-mail.

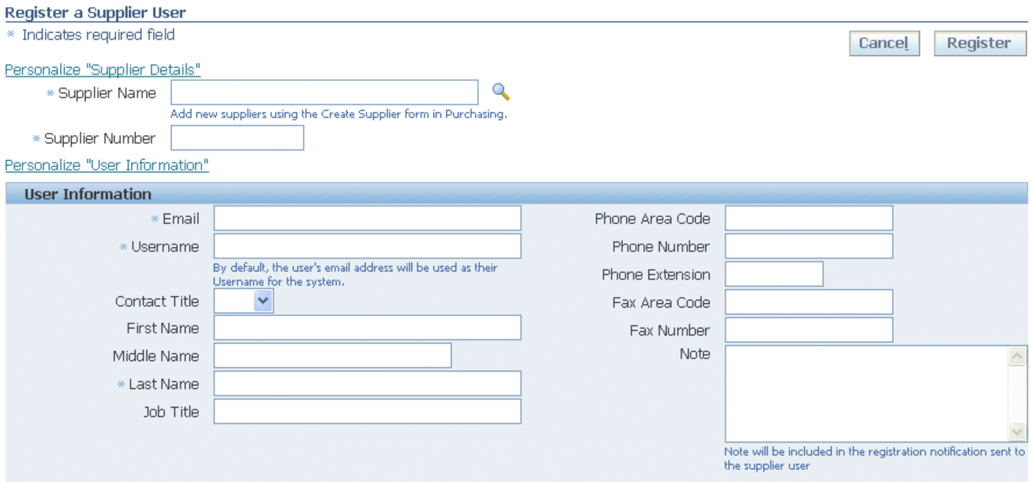
Registering Users

The buying company initiates the process of adding new suppliers by inviting supplier users to register, or by registering supplier users directly. If you receive an invitation to access Oracle iSupplier Portal, you can respond to the invitation (and provide user profile information, such as name and contact details), or forward the invitation to another user in your company. For example, the buying company may send an invitation to the Vice President of Sales within your organization; he can forward it to the appropriate person in his company. The user who responds can change any of the details except the name of the supplier company for whom he or she is registering.

If the buying company has multiple site definitions for your company, or if you have multiple subsidiaries, your buying company may give you access to view information for multiple site definitions.

People who wish to register with the system must complete the Supplier User Registration Page and submit it for approval

Supplier User Registration Page



A buyer administrator will approve or reject the your registration request. You receive a notification of the buyer administrator's actions. The notification includes the URL at which you can access the network, plus any additional information such as the username and a system-generated password needed for initial login. (You will be prompted to change this password after first login.)

Directly Registered Supplier Users

If the buying company has enough information about a user at your company, the buyer can chose to register the user directly, in which case the users receives an e-mail notification with the URL, username, and system-generated password.

Supplier Registered Supplier Users

If additional people in your company need access to Oracle iSupplier Portal, they should contact the Supplier Profile and User Administrator at your company. This administrator can create new user accounts for your users. Once the account is created, the user will be sent a notification containing system access information.

3

Navigating and Searching

This chapter covers the following topics:

Overview

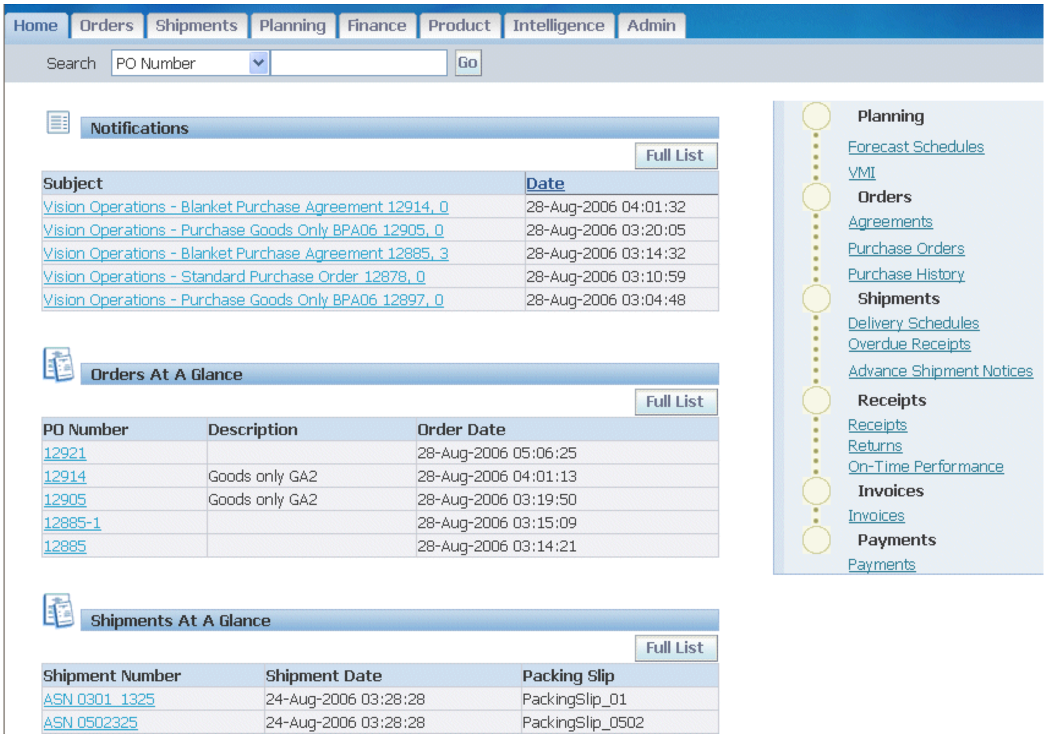
This section includes information to help you learn how to navigate and search in Oracle iSupplier Portal. After you learn the basic techniques, you will be able to search for transaction information, and respond accordingly.

This section includes the following topics:

Using the Oracle iSupplier Portal Home Page

When you access the Oracle iSupplier Portal application using the username and password provided to you, the **Oracle iSupplier Portal Home** page displays. Depending on your authorizations, the Admin and Intelligence tabs may not be displayed.

Oracle iSupplier Portal Home Page



Quick Links

This section is displayed on the right and provides a high-level diagram of the procure-to-pay flow through the Oracle iSupplier Portal application. Click any link to go directly to the corresponding page.

Notifications

Notifications are messages waiting for your review. Some notifications are view-only, while other notifications require action. To view your notifications, click the linked subject to open the **Notification Details** page. This page provides complete notification details, as well as the appropriate action button.

Notification Details Page

On the **Notification Details** page you can request further information or assign the notification to another user.

If you select an action on the **Notification Details** page and click, you are returned to the **Notifications Summary** page.

On this page you can view all your notifications.

You can use the View menu to see

- All your notifications
- Information only (FYI) notifications
- Notifications you have sent
- Open notifications
- Notifications requiring action by you (To Do Notifications)

To process a notification, select the notification and assign it to another user, or open and view/process it. Once you have processed the necessary notification you can:

- Continue to respond to any additional notifications you have.
- Continue working by clicking any of the tabs.

Orders at a Glance

This section displays the five most recent purchase orders. Click a purchase order number to view purchase order details.

Shipments at a Glance

This section displays recent shipments. Click a shipment number to view a list of your recent shipments.

To view a complete list of your Notifications, Orders at a Glance, or Shipments at a Glance, click Full List.

Home Page Links

The links at the top of the **Home** page provides the following information:

Home Page Links

Global Buttons

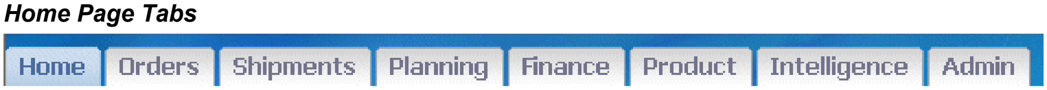
The following buttons display on the home page and all Oracle iSupplier Portal pages:

- Home - Returns you to the main portal where you can select another responsibility or application.
- Logout - logs you out of the application.
- Preferences - Displays the **Preferences** page. See Setting Up User Preferences , page 3-4 for information on setting your user preferences.
- Help - Accesses the help index page.

Home Page Tabs

In addition to using the Quick Links, you can use the tabs on the home page to quickly access related task areas.

Home Page Tabs



Setting Up User Preferences

You can change your user settings or preferences at any time using the Preferences icon. You can change the following preferences:

- General - You can select your language, territory, time zone, client character encoding (the character set that's used in your page display), and accessibility features (such as screen reader use).

  Note: Date and time values are always displayed to you in the time zone you set in your user preferences, even if your buying company is in a different time zone.

- Notification - You can select how you want to receive your notifications (for example, in HTML or plain text e-mail).

- Formatting - You can define your date format and number format.

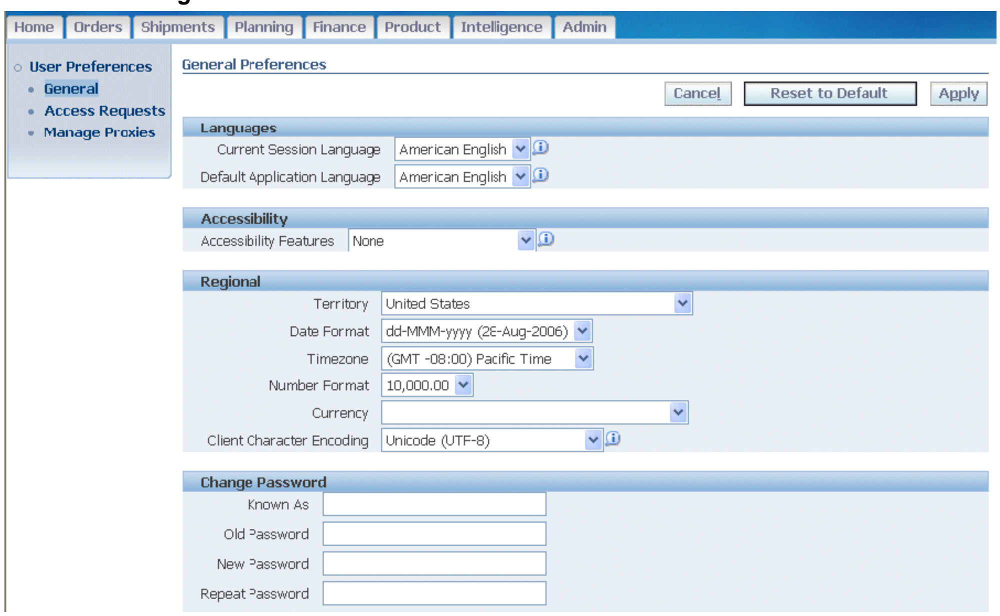
- Password - You can reset or change your password. A valid password must be at least five, but no more than 30, characters. Passwords can be numeric, alphanumeric, or special characters.

  To change your preferences

- Click the Preferences icon.

- On the **Preferences** page, enter your name in the Known As field.

Preferences Page



- Complete or update the required fields.

- Click Apply to save your changes. Click Cancel to return to the system without making any changes.

Searching

Oracle iSupplier Portal provides extensive search criteria on all pages to help you retrieve information. Once you have your search results displayed, you can sort them by clicking any of the linked column headings.

When entering search values, you can use the percent sign (%) as a wildcard to search for generic items. For example, to search for all orders beginning with 27 and end in a 5 (such as 275, 2715, 27125) enter 27%5. The % wildcard does not control the number of wild characters. Note the search logic attempts to find matches containing values in any position.

There are three types of search functions available to you.

Quick Search

The Quick Search feature is available to you from the **Home** page. Using Quick Search, you can look for

- Purchase orders
- Shipments
- Invoices
- Payments

Quick Search

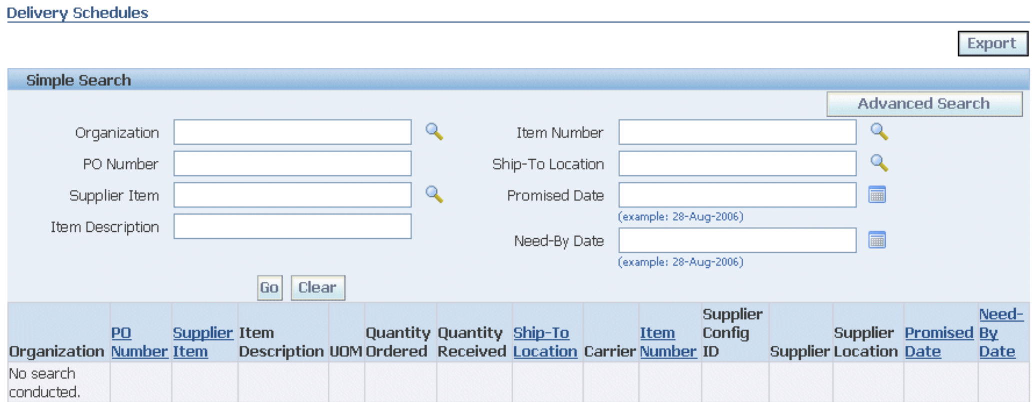
To use the Quick Search:

1. Select the search type from the Search menu.
2. Enter a search value.
3. Click Go.

SimpleSearch

The Simple Search feature occurs on many pages and allows you so specify multiple search fields and enter criteria for each. You can use any or all of the fields available to you. The system displays only those results that match all the criteria you entered.

Simple Search



Advanced Search

Advanced Search allows you to build complex search queries containing multiple search criteria. You can select which fields you wish to search on and enter search values for each. Such fields include (among others):

- PO Number
- Receipt Number
- Item Number

You can use the default search fields that appear for that page's Advanced Search function, or apply additional search fields from the "Add Another" menu for the page.

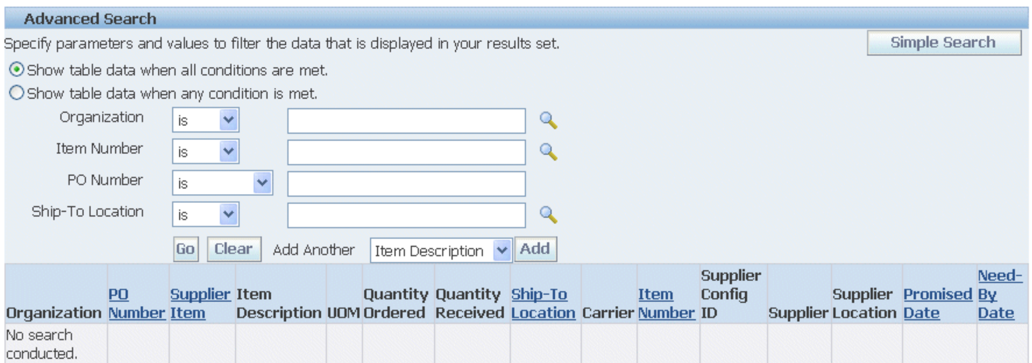
Search operators enable you to specify the matching conditions for a search. Available search operators are:

- is - Use this operator for an exact match.
- is not - Use this operator to exclude a specific match.
- contains - Use this operator to find a partial match.
- starts with - Use this operator to find a partial match only at the beginning.
- ends with - Use this operator to find a partial match that only ends with your criteria.
- greater than - Use this operator to include results greater in value than a value specified.
- less than - Use this operator to include results lower in value than a value specified.

- after - Use this operator to include results with a date after the specified date.
- before - Use this operator to include results with a date before the specified date.

Note that you can use the same search field twice to specify a search range, for example a Ship Date range. Also note that you can choose to require the results to match all search criteria (resulting in a more focused, narrower set of results) by selecting the option "Show table data when all conditions are met," or allow a match of any of the search criteria (resulting in a larger set of results) by selecting the option "Show table date when any condition is met."

Advanced Search



4

Order Information

This chapter covers the following topics:

- Order Information
- Purchase Purchase ordersOrders
- Viewing Purchase Orders
- Printing Purchase Orders
- Acknowledging Purchase Purchase ordersacknowledgingOrders
- Submitting Change Submittingchange requestsRequestsPurchase orderssubmitting change requests
- Splitting Shipments and Pay Items
- Using Work Confirmations (Complex-Work Purchase Orders only)
- Canceling Orders or Shipments
- Managing Deliverables
- Work Manufacturing ordersOrders
- Agreements
- Purchase Order Revision History
- Requests Requests for quotesFor Quotes (RFQ)
- Viewing Time Cards

Order Information

The real-time data provided in Oracle iSupplier Portal allows you to communicate procure-to-pay information with the buying company while viewing the purchase order flow.

Using purchase order information, you can acknowledge purchase orders, make change requests to purchase orders, split shipments, or cancel orders. You can also view supplier agreements and the revision history of a purchasing document.

This section includes the following topics:

Purchase Orders

When your buying company enters a purchase order in Oracle Purchasing, the purchase order details are available to you in Oracle iSupplier Portal. The **View Purchase Orders** page display the most recent 25 purchase orders (use the Previous and Next links to view additional purchase orders). Oracle iSupplier Portal enables you to track your purchase orders throughout the entire procure-to-pay flow.

The purchase order section includes:

> **Note:** For the pages mentioned in this chapter, you may view details to various attributes by clicking the link associated with that attribute.

Accessing purchasing orders:

The **View Purchase Orders** page is the central page from which you access and process your purchase orders.

To access a purchase order for further processing:

1. From the iSupplier Portal **Home**

   page, click the Orders tab.

2. From the View menu, choose which purchase orders to display:

   - All Purchase Orders

   - Purchase Orders to Acknowledge

   - Purchase Orders Pending Change

   An advanced search , page 3-7 facility is available to refine your search even further. You also have the option to export the displayed data.

On the resulting **View Purchase Orders** page, select the purchase order you wish to process:

- To acknowledge , page 4-7 a purchase order, click Acknowledge

- To submit a change request, page 4-10 click Request Changes.

- To view purchase order changes,, page 4-14click View Change History.

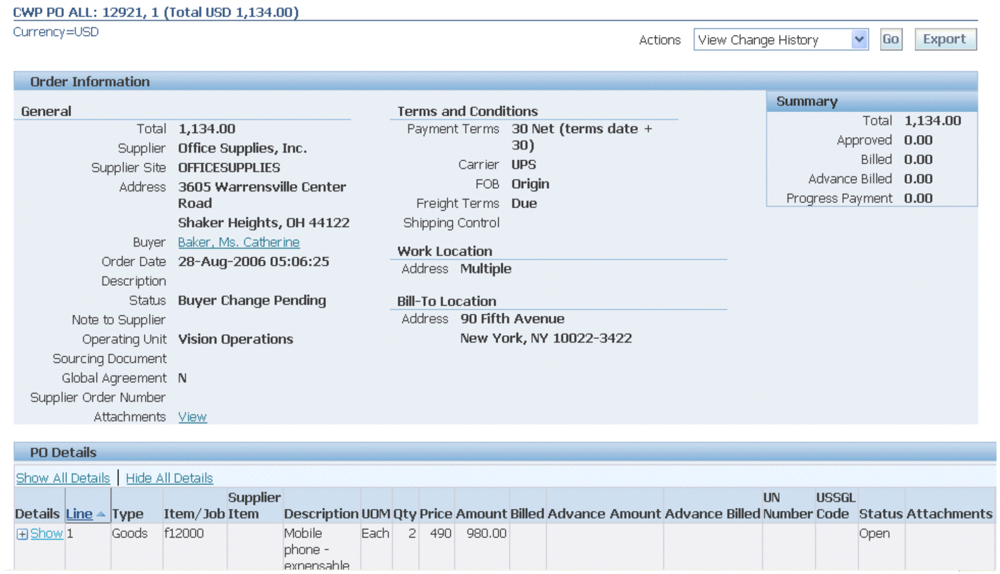
Viewing Purchase Orders

You can view details of a purchase order such as terms and conditions, lines, shipments, and attachments from the **Purchase Order Details** page.

To view the details of a purchase order:

1. Access , page 4-2 the purchase order you wish to view by clicking its purchase order number link.

View Order Details Page



The **View Order Details** page shows you detailed information about the purchase order, including both header and line information. The Order Information section shows general information, terms and conditions, ship-to (non-complex work purchase orders), work location (for complex-work purchase orders) and bill-to information.

In the Summary container, you can view the

- Total - amount of the total purchase order.
- Received - amount for the items of the purchase order that have been received.
- Invoiced amount - amount for the items on the purchase order that have been invoiced.
- Payment status - status of the invoices against the PO.

By selecting options from the Actions menu, you can

- Request changes.
- Cancel the purchase order.
- View the change history for this purchase order.
- View work orders
- Print the purchase order.
- Create a work confirmation (complex-work purchase orders only).

- View work confirmations (complex-work purchase orders only).
- View current receipts.
- View current invoices.
- View current payment status.
- View current shipment status.

View Order Details (Complex Work)

The Summary container on the **View Details** page for a complex work PO displays different information.

- Approved amount - total approved amount of work confirmations against the PO.
- Financed amount - total pay item amounts financed plus advanced billed.
- Advanced billed amount - total advance amounts billed at the line level.
- Progress payment - total amount financed or billed of all pay items.
- Delivered - amount of the delivery shipment approved through the work confirmation. Delivery shipments are created for orders where progress payments are considered contract financing. This field is hidden by default.
- Recouped - amount of advances and pay items recouped to date. This field is hidden by default.
- Retained - amount of pay items retained to date. This field is hidden by default.

The Actions menu options include:

- Request changes.
- Cancel the purchase order.
- View the change history for this purchase order.
- Print the purchase order.
- Create a work confirmation.
- View work confirmations.
- View current receipts.
- View current invoices.
- View current payment status.

The PO Details sections shows line specific information. Click Show to see the receiving, invoicing and payment information for a particular line, or pay item information for a complex work line.

Line Information

Shipments

			Qty			Amount						
Shipment	Work Location	Price	Ordered	Received	Invoiced	Ordered	Received	Invoiced	Promised Date	Need-By Date	Payment Status	Status
1	V1- New York City	100				100.00				06-Oct-2006 17:47:17		Open

Line Information (Complex Work Line)

Progress Payment

									Amount					
Pay Item	Type	Description	Work Location	Owner	UOM	Qty	Value (%)	Price	Ordered	Approved	Billed	Promised Date	Need-By Date	Payment Status
1	Rate	Line2	V1- New York City		Each	1		200	200.00				06-Oct-2006 07:21:58	

Printing Purchase Orders

You can view and print Portable Document Format (PDF) versions of purchasing documents, including blanket agreements. If your buying company has implemented Oracle Procurement Contracts, you can also print the contract terms or clauses that the buying company has defined on the purchasing documents.

To print purchase orders:

1. Access , page 4-2 the purchase order.

2. Select View PDF from the Actions menu, and click Go..

3. On the prompt window, you can choose to open the document immediately, or save it locally for later printing.

Acknowledging Purchase Orders

When creating a purchase order, buying companies can request acknowledgment of the purchase order. If so, you will receive a notification requiring your response. The purchase order may include a date by which you need to acknowledge or sign it.

You acknowledge purchase orders to communicate to the buying company that you have received, reviewed the details of, and accepted or rejected a purchase order. You can also communicate changes to the purchase order during acknowledgment.

You can either acknowledge the order online, or accept or reject the order using the notification. The notification does not allow shipment level acknowledgment, which must be entered online. When you respond, the purchase order is automatically updated, and a notice is sent to the buyer.

You can submit acknowledgments for an entire order, or for individual shipments. For example, if you can fulfill only part of a purchase order, accept the shipments you can fulfill, and reject the others (note that shipment level acknowledgement cannot be performed using the acknowledgement notification).

If the order is set to be acknowledged at the document and shipment levels, you can also indicate change requests during acknowledgment. For example, if you cannot fulfill a shipment on the given date, but can fulfill it a few days later, you can communicate a date change request instead of rejecting the shipment line.

For complex work purchase orders, you can acknowledge pay items.

To acknowledge purchase orders:

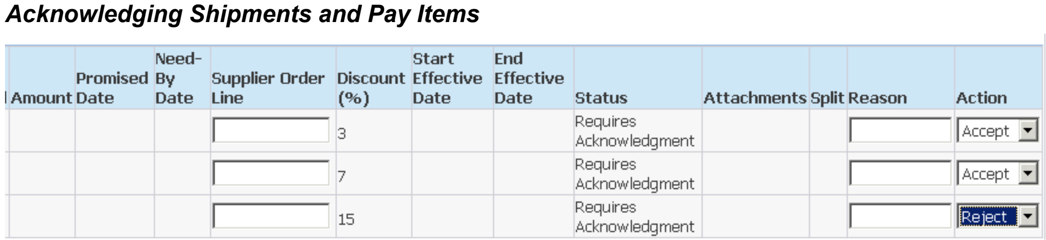
1. Access the purchase order you wish to acknowledge.

Acknowledge Purchase Order Page

2. On the **Acknowledge** page, you can accept or reject an entire order, or you can accept or reject individual shipment.

3. To accept/reject an individual line's shipment or pay item, click Show for the line.

Acknowledging Shipments and Pay Items



1. For the shipment/pay item, select Accept or Reject from the Action menu. If rejecting a shipment or pay item, provide a reason.

2. Click Submit.

Acknowledging pay items If the terms for a complex-work purchase order terms require "document or shipment" acknowledgement, you can accept/reject at the pay item level. To accept/reject an individual pay item, click Show for that line. Select Accept or Reject from the Action menu at the end of the line (if you reject the pay item, you must also provide a reason). If you either accept or reject all the pay items, the purchase order status changes to "acknowledged."

You can also change a pay item during the acknowledgement phase. If you change a pay item. To change a pay item, modify the appropriate field, select Change from the Action menu, provide a reason, and click Submit. Pay item changes are immediately submitted to the buyer for acknowledgement even if the rest of the order is only partially acknowledged. If the buyer rejects the change, the purchase order status reverts back to "Requires Acknowledgement."

Signing Purchase Orders

If your buying company has implemented Oracle Procurement Contracts, your buyer may ask that you electronically sign a purchasing document while acknowledging it. Legally binding purchasing documents must be signed by both the buyer and supplier.

After you sign the document, your buyer will be notified. The purchase order will be ready for execution after both the buyer and supplier have electronically signed the purchasing document.

> **Note:** If your buyer asks that you electronically sign a purchasing document, you cannot respond at a specific shipment level, you have to accept or reject the entire order.

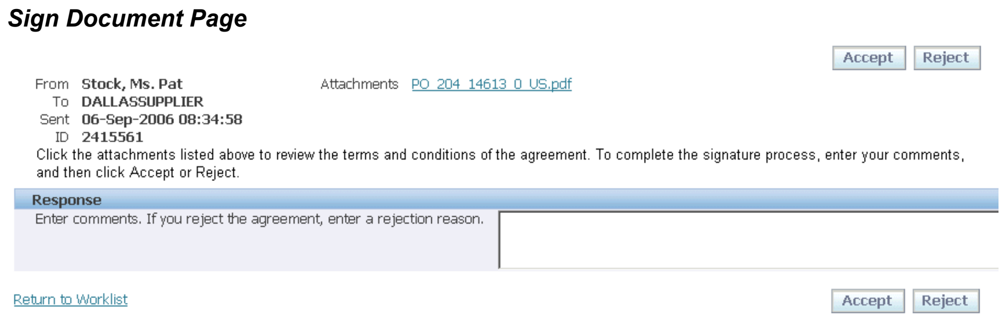
To sign a purchase order:

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.

2. Search for and select the purchase order with a status of Requires Signature, and then click Acknowledge.

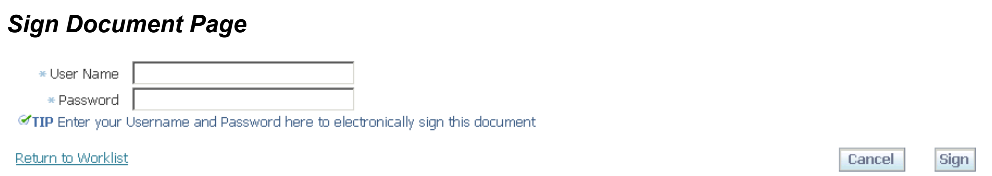
Purchase Order Signature Page

3. On the **Acknowledge** page, click Sign Document.



4. Click any attachments you would like to view to review the attachments for terms and conditions.

5. Click Accept or Reject.



6. On the **Notification Signing** page, enter your username and password and click Submit.

7. You will receive confirmation that your purchase order has been acknowledged.

Submitting Change Requests

Oracle iSupplier Portal enables you to request changes to purchase orders when modifications are needed to fulfill an order. You can make changes during and after acknowledgment. You can change a single purchase order, or, depending on the change you need to make, you can update multiple change orders at the same time.

To submit a single change request:

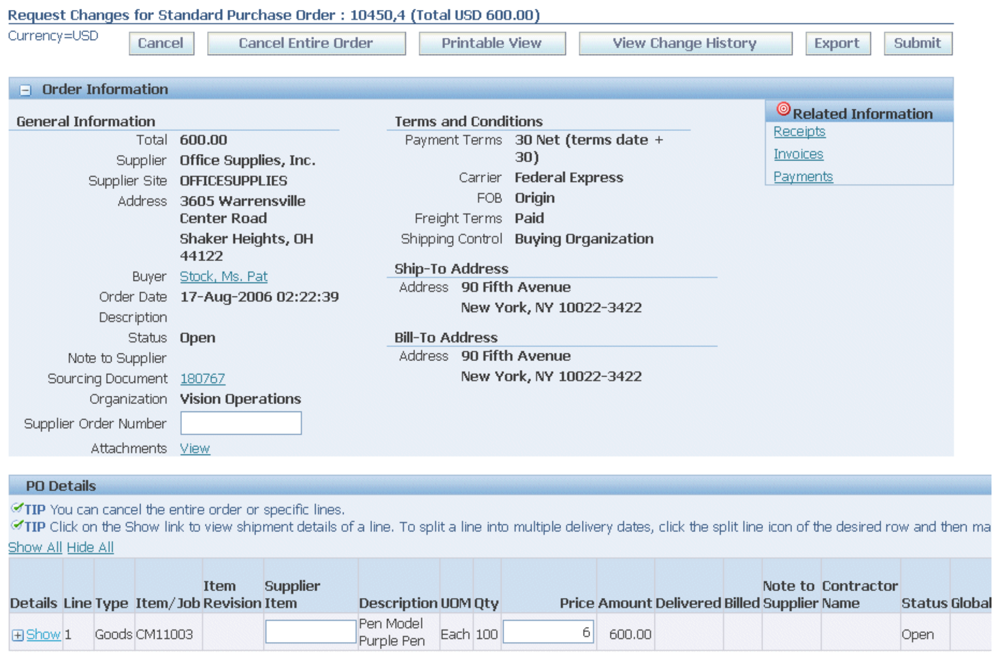
1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.

2. On the **View Purchase Orders** page, search for and select the purchase order for which you wish to request changes.

3. Select the purchase order and Click Request Changes.

4. On the **Request Changes** page, enter your changes.

Request Changes Page



5. You may request changes to the following values :
   - Price/Price Breaks on Blanket Agreements
   - Supplier Item
   - Supplier Order Reference Number
6. In the reason text box, enter a reason for your change request.
7. If you wish to request changes to shipments or pay items, Show. You can request changes to
   - Price/Price Breaks on Blanket Agreements
   - Quantity Ordered
   - Promised Date
   - Supplier Order Line
   - Note that you can also enter change request information in the Additional Change Request text box.
8. Enter the changed values as appropriate.

9. Enter a reason for your change.

10. Select the appropriate action.

11. Click Submit.

Changing complex-work purchase orders

If this is a complex-work purchase order you can only change the supplier item at the line level. If progress payments are treated as delivery, price updates are only allowed at the pay item level (any changes roll up to the line level). If pay items are considered contract financing, then price updates at both the line level and pay item level are allowed.

- **Price changes -** For milestone and rate, price changes are not allowed if the pay item has been partially received or invoiced (that is, retroactive price changes are not allowed). For a lump sum, if the pay item has been partially received or invoiced, the new price should equal or greater than the amount received or invoiced to date.

  Changes in price are prorated to the distributions if the shipment has multiple distributions. The buyer can change the distribution amounts during response.

- **Quantity changes -**

  Quantity changes are only allowed for Rate pay items. If the pay item has been partially received or invoiced, the new quantity should be greater than or equal to the larger of either the quantity received or the quantity invoiced. A change in quantity is prorated to distributions, if the pay item has multiple distributions. The buyer can enter new quantities when responding.

Note: After submitting your changes, the purchase order status changes to Supplier Changes Pending until the buyer approves the changes.

To update multiple purchase orders simultaneously:

Many times, you may need to make the same change to a group of purchase orders. Depending on the type of change you need to make, you may be able to update multiple purchase orders simultaneously. You can perform multiple changes to standard purchase orders, aagreements, and releases.

For purchase order lines, you can change:

- Unit Price (only for goods lines)
- Supplier Part Number

For purchase order shipments, you can change:

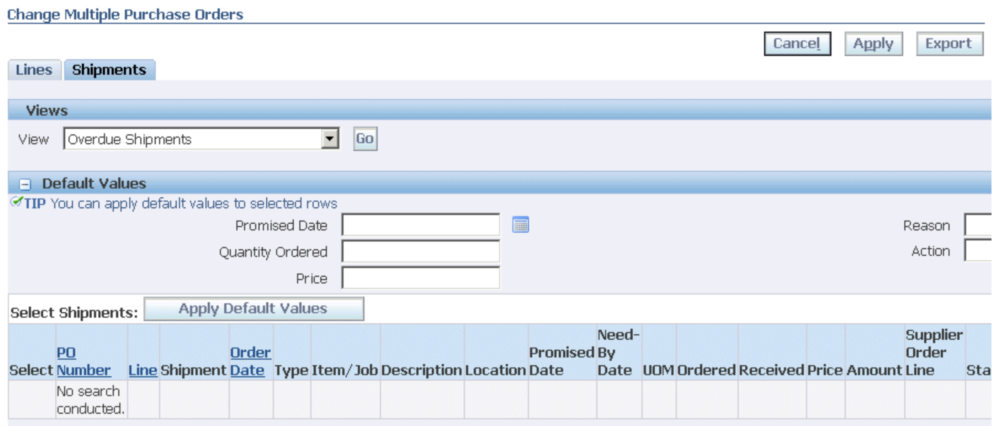
- Promised Date
- Quantity Ordered (only for goods shipments)

- Price (only for shipments with lines where value basis is fixed price).

To update multiple purchase orders:

1. On the **Purchase Orders** page, click Multiple PO Change.

Multiple Purchase Order Changes

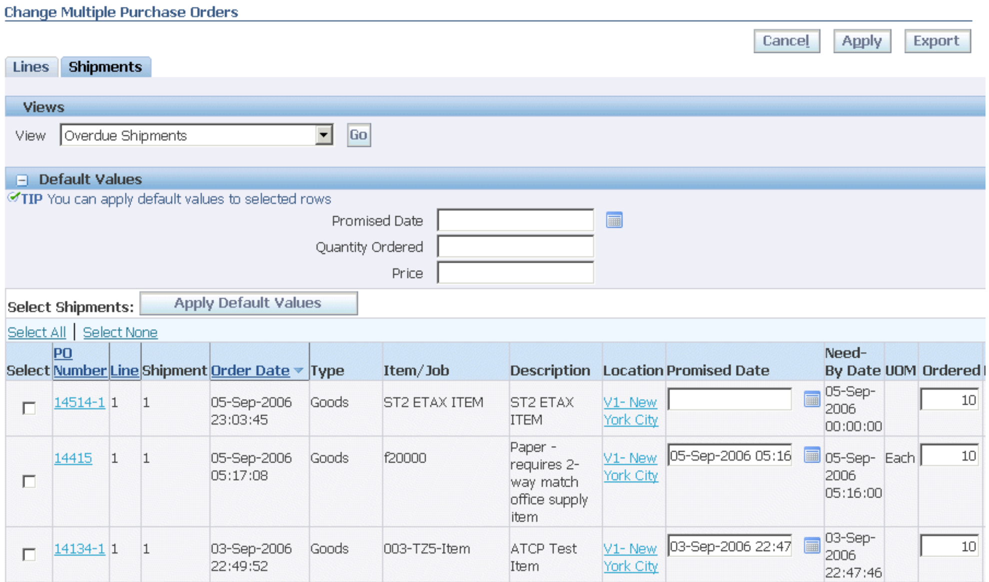


2. You can search for shipments to acknowledge or change by selecting
   - Overdue Shipments
   - Shipments Dues in One Week
   - Shipments Requiring Acknowledgments
   - All Shipments

   from the View menu and clicking Go.

3. You search for a group of purchase orders, click the Lines tab and use the advanced search option to identify the group of purchase orders you wish to change.

Multiple Purchase Order Change Page



4. If you wish to change the same attribute for multiple purchase orders to the same value,

    1. Enter the new value in the Default Value field.

    2. Select the appropriate purchase orders.

    3. Click Apply Default Values.

5. If you wish to update multiple purchase order attributes to different values, enter the new values directly into the fields in the Lines table.

6. Enter a short text explanation for the change in the Reason field.

7. Click Apply.

To view change order history:

This view enables you to view the history of change requests submitted on a document, and the corresponding buyer response.

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.

2. Search for and select a purchase order, and then click View Change History.

3. View the change order history details on the **PO Change Order History** page.

PO Change History Page

Change History for Standard Purchase Order: 10450

Currency=USD

Ok

Indicates new values

-- Indicates cancellation

Details	Request Date	Line	Shipment	Item	Supplier Item	Description	Qty	UOM	Price / Rate	Amount	Promised Date	Need-By Date	Start Date	End Date	Supplier Order Number	Supplier Order Line Number
Show	28-Aug-2006 13:42:23	1		CM11003		Pen Model Purple Pen		Each	6 8							
Show	17-Aug-2006 02:21:57	1		CM11003		Pen Model Purple Pen		Each	5 6							
Show	15-Aug-2006 10:27:37	1		CM11003		Pen Model Purple Pen		Each	2 5							

4. Click OK to return to the **Purchase Orders** page.

Splitting Shipments and Pay Items

You can request to split a shipment. For example, if you can only partially ship the quantity ordered for the given date, you can enter a split shipment change request. This request will let the buyer know the number of items you can deliver and what date you will deliver them.

To request to split a shipment:

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.
2. Search for and select a purchase order, and then click Request Changes.
3. On the **Request Changes** page, click Show to display shipment details.
4. Click the split icon on the desired shipment line. (Another row is added for your split shipment).

Split Shipments Page

Supplier Order Line	Discount (%)	Start Effective Date	End Effective Date	Status	Attachments	Split	Reason	Action
				Open				

5. In the Quantity Ordered field of the first shipment line, enter a new quantity.
6. In the Quantity Ordered field of the second shipment line, enter the new quantity.

7. Change the Promised Date.

8. Enter the Supplier Order Line.

9. Enter a reason for splitting.

10. Select an action for change.

11. Click Submit.

    Note: You can split a shipment as many times as needed. To create more shipment lines, click the split icon.

Splitting Pay Items for Complex Work Purchase Orders

The pay items for a complex-work purchase order are stored at the line details level the same way as shipment information. Therefore, you can use the instructions above to split an existing pay item to create a new payment schedule. A new pay item is created with a price of 0 and quantity or 0. You can modify the following fields:

- Description
- Price (if lump sum, the price on the original pay item should be greater than the larger of either the amount received or the amount invoiced).
- Promised date.

Using Work Confirmations (Complex-Work Purchase Orders only)

Over the course of a complex work project, various pay items defined for the contract come due. To notify a buyer that a pay item needs to be processed for a completed unit of work, you can create a work confirmation.

To create a work confirmation:

1. Access , page 4-2 the purchase order.

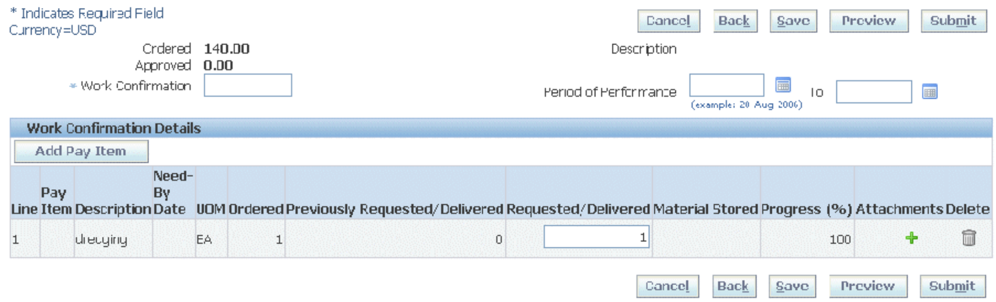
2. On the **PO Details** page, select Create Work Confirmation from the Actions menu and click Go.

3. From the View menu, select either
   - Pay Items Due This Week
   - Pay Items Due This Month
   - All Pay Items

4. Click Go.

5. On the **Create Work Confirmation** page, select one or more pay items and click Next.

Create Work Confirmation Page



6. Enter a work confirmation ID.

7. If this work confirmation reflects a particular span of time, optionally enter performance period dates.

8. Accept the default or enter a value for Requested/Delivered. .

9. Update the Progress Percentage column, if appropriate.

10. Click Save to keep a draft work confirmation in the system. You can return tot he draft later for make further updates or submit it. When you have finished defining your work confirmation, click Submit. Once you click Submit, the approver is notified of the work confirmation and must approve it.

To view/update existing work confirmations:

You can view existing work confirmations.

1. From the Orders tab, click the Work Confirmations subtab.

2. From the View menu, select either

   - Last 25 Work Confirmations
   - Draft Work Confirmations
   - Rejected Work Confirmations
   - All Work Confirmations

3. Click the work confirmation number to access and view the work confirmation.

You can select the work confirmation and click Update if you need to make changes to confirmation or address any issues with a rejected confirmation. You can modify details of a rejected work confirmation as well as add additional items.

If the confirmation has a status of Processing, Rejected, or Pending Approval, you can select the confirmation and delete it.

Canceling Orders or Shipments

You can submit cancellation requests for an entire order or a particular shipment. You can also submit changes and cancellations at the same time.

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.

2. Search for and select a purchase order, and then click Request Cancellation.

3. On the **Request Cancellation** page, click Submit.

   Note: To cancel a few shipments, but not the entire order, click Show in the PO Details section, and then select Cancel from the Action list of values (on the shipment line you want to cancel). Enter a cancellation reason, and then click Submit.

Request Cancellation Page

Managing Deliverables

If your buying company has implemented Oracle Procurement Contracts, you may have deliverables assigned to you. Deliverables are tasks to be completed in order to achieve a certain outcome or business objective, and may be used to track projects for compliance reasons and risk reduction.

For example, your buyer may ask that you send a monthly status report detailing the status of a certain shipment. In this case, your buyer will create a deliverable called

"Send Status Report," and assign the deliverable to you. You will see the "Send Status Report" deliverable in the notifications section of the **iSupplier Portal** home page, and can manage the deliverable from there, or through the **View Order Details** page. You may attach your status report to the deliverable and change the status of the deliverable.

To manage deliverables:

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.

2. Select the PO number of the purchase order that includes deliverable(s) you would like to manage.

3. On the **View Order Details** page, select Manage Deliverables from the Actions menu, and click Go..

Manage Deliverable Page

Ok

TIP This page only shows deliverables for the latest approved version.

Indicates deliverable is overdue   Indicates responsible party failed to perform the deliverable

Deliverable Name	Deliverable Type	Party Name	Contact	Due Date	Status	Alert	Update
Performance Reviews for PO's	Contractual	Vision Operations	Stock, Ms. Pat	05-Nov-2006	Open		

Ok

4. On the **Deliverables** page, click the pencil icon on the deliverable you would like to update.

5. Update and add attachments to the deliverable as necessary, and then change its status to Submitted.

6. Click Apply.

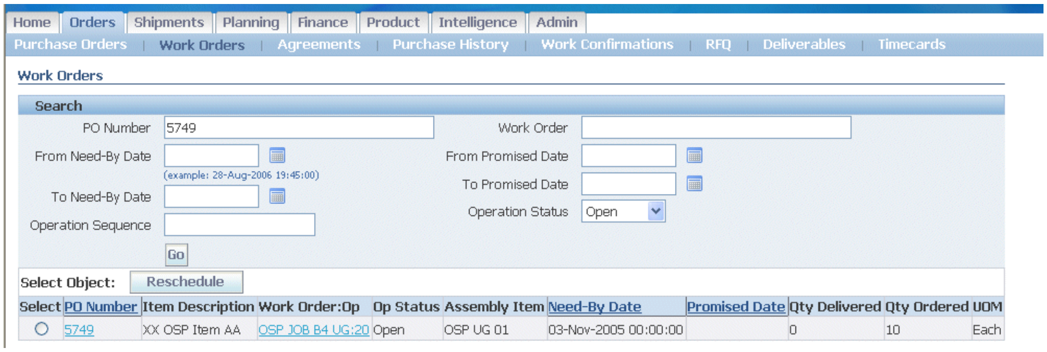
7. You will receive confirmation that your deliverable has been updated. Your buyer will also receive notification that the status of the deliverable has been updated.

Work Orders

Using work orders, buyers and suppliers can monitor outside processing from third parties whose Work In Process (WIP) status and delivery tracking information is critical to their supply chain process flow. Outside processing activities are the activities of the third-party suppliers who provide services needed to complete the final product or maintenance activity.

To view work orders, click the Orders tab, and then click Work Orders in the task bar directly below the tabs. Using the search criteria, you can view details of the orders, schedules, WIP details, operations instructions, components, and component instructions by selecting the links provided. You can also reschedule an order.

Work Orders Page

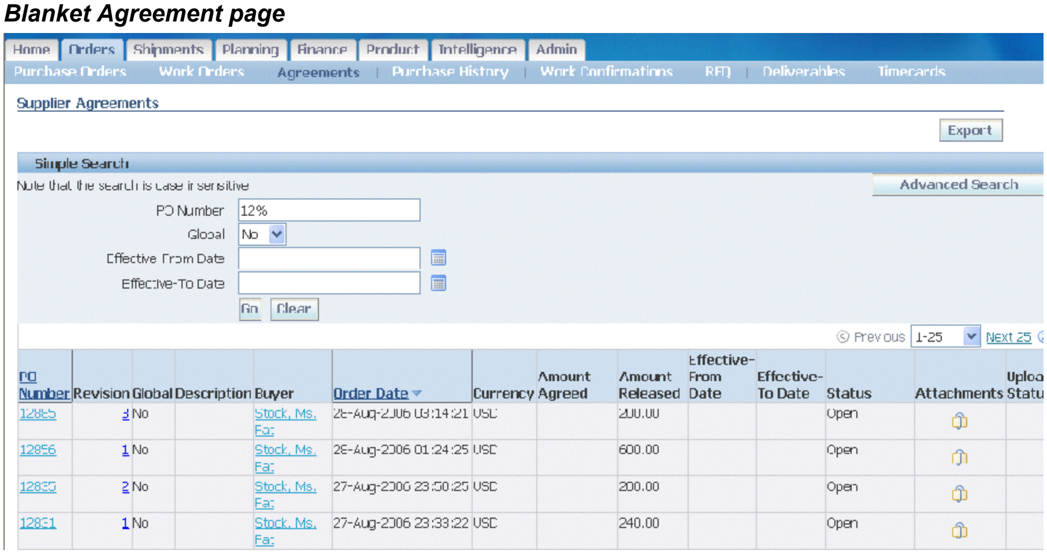


Agreements

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

To view agreements, click the Orders tab, and then Agreements in the task bar directly below the tabs. Use the search criteria to get a summarized list of agreements. For each agreement, you can select to view the releases created to date for that agreement. You can export details from any page.

Blanket Agreement page



Editing Agreements

From time to time you may need to update your catalog content at the buyer's site. You can do this by editing the blanket agreement you have with your buyer providing the buyer has enabled the agreement to allow you to do so.

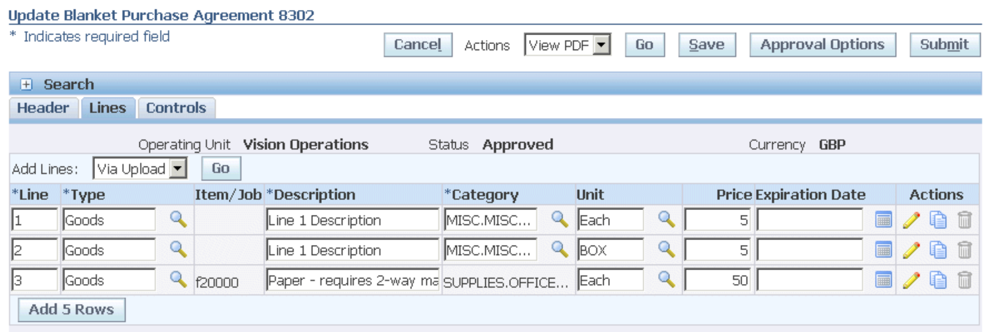
To edit a catalog information:

1. Access the blanket purchase agreement.

2. On the **Blanket Purchase Agreement** page, click the purchase number link in the header.

3. On the **View Order Details** page, select Edit Agreement from the Actions menu.

Update Agreement page



4. See the Oracle iProcurement online help for instructions on updating your agreement.

Purchase Order Revision History

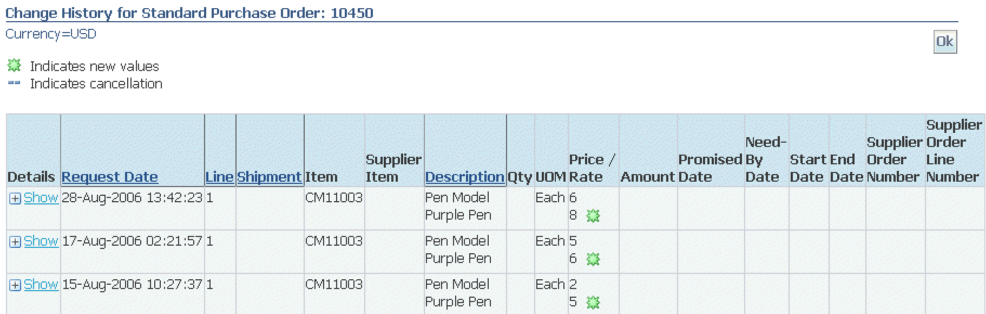
The **PO Revision History** page enables you to search for details on the revision history of a purchase order.

Using the search criteria, you can get a summarized list of purchase orders that have been revised. You may choose to compare each revised PO to the original PO, the previous PO, or last signed PO (if the revised PO has been signed). You can also view all changes made to the PO.

1. From the iSupplier Portal Home page, click the Orders tab, then click the Purchase History subtab.

2. Enter search criteria to identify the purchase order(s) you wish to inspect. Click Go.

Purchase Order Change History Page


Change History for Standard Purchase Order: 10450

Currency=USD

Ok

Indicates new values

Indicates cancellation

Details	Request Date	Line	Shipment	Item	Supplier Item	Description	Qty	UOM	Price / Rate	Amount	Promised Date	Need-By Date	Start Date	End Date	Supplier Order Number	Supplier Order Line Number
Show	28-Aug-2006 13:42:23	1		CM11003		Pen Model Purple Pen		Each	6 8							
Show	17-Aug-2006 02:21:57	1		CM11003		Pen Model Purple Pen		Each	5 6							
Show	15-Aug-2006 10:27:37	1		CM11003		Pen Model Purple Pen		Each	2 5							

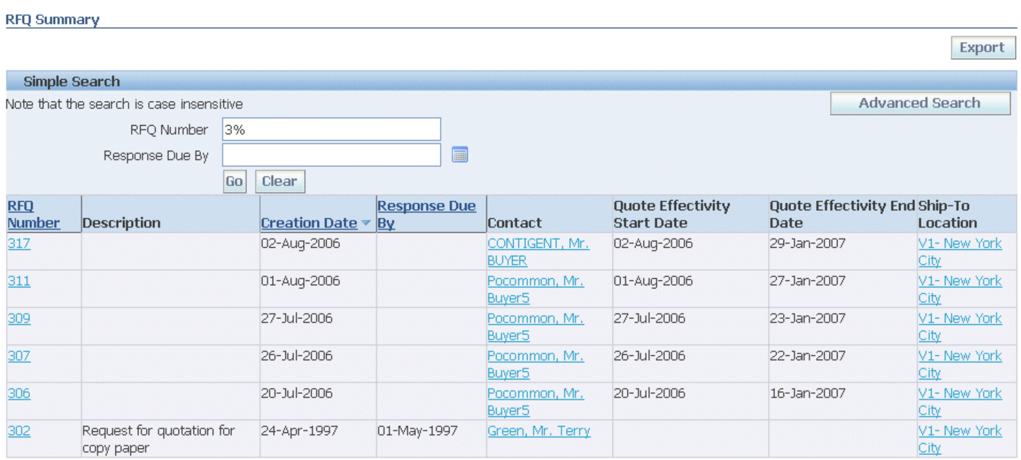
3. From the PO Revision History page, for any particular version, you can compare it to its previous version, compare it to the original purchase order, or you can generate a detailed listing of all changes to the purchase order.

Requests For Quotes (RFQ)

Viewing requests for quotes (RFQs) enables you to select possible negotiations to participate in with the buying company.

To view RFQs, click the Orders tab, and then click RFQ in the task bar directly below the tabs. Enter search criteria in the search fields and click Go. The **RFQ Summary** page provides the details of all RFQs created by the buying company in its ERP application. Click any of the links on the **RFQ Summary** page to get more details about the RFQ.

RFQ Summary Results Page


RFQ Summary

Export

Simple Search

Note that the search is case insensitive

Advanced Search

RFQ Number 3%

Response Due By

Go Clear

RFQ Number	Description	Creation Date	Response Due By	Contact	Quote Effectivity Start Date	Quote Effectivity End Date	Ship-To Location
317		02-Aug-2006		CONTIGENT, Mr. BUYER	02-Aug-2006	29-Jan-2007	V1- New York City
311		01-Aug-2006		Pocommon, Mr. Buyer5	01-Aug-2006	27-Jan-2007	V1- New York City
309		27-Jul-2006		Pocommon, Mr. Buyer5	27-Jul-2006	23-Jan-2007	V1- New York City
307		26-Jul-2006		Pocommon, Mr. Buyer5	26-Jul-2006	22-Jan-2007	V1- New York City
306		20-Jul-2006		Pocommon, Mr. Buyer5	20-Jul-2006	16-Jan-2007	V1- New York City
302	Request for quotation for copy paper	24-Apr-1997	01-May-1997	Green, Mr. Terry			V1- New York City

Viewing Time Cards

To be paid for services rendered, contractors can record hours worked using timecards. You may access these time cards if the Timecards task appears under the Orders Tab. You will be able to view timecard information and check the amount of time confirmed by the hiring manager.

To view timecards, click the Orders tab, and then click Timecards in the task bar directly below the tabs. Use the search criteria to get a summarized list of timecards. Click View Timecard to get more details about the timecard. You can export details from any page.

5

Shipping Information

This chapter covers the following topics:

- Shipping Overview
- Shipping Information
- Advance shipment noticesUsing Advance Shipment NoticesShipping informationadvance shipment notices and Shipping informationadvance shipment billing noticesAdvance Shipment Billing Notices
- Creating Advance Creating Advanced Shipment NoticesShipment Notices and Advance Shipment Billing Notices
- Uploading Advance Shipment Notices and Advance Shipment Billing Notices
- Canceling Advance Shipment Notices and Advance Shipment Billing Notices
- Uploading Routing Requests
- Viewing Routing Responses
- Viewing Delivery Schedules
- Shipment informationoverdue receiptsViewing Overdue Receipts
- Receiving InformationReceiving information
- Receiving informationreceiptsViewing Receipts
- Viewing Returns
- Viewing Receiving informationon-time delivery performanceOn-Time Delivery Performance
- Quality informationQuality Information

Shipping Overview

This section includes the following topics:

Shipping Information

Oracle iSupplier Portal enables you to view your existing shipments. Using your shipments you can create or cancel advance shipment notices. The system enables you to view other shipment information such as delivery schedules.

Using shipping features, you can alert the buyer to upcoming shipments and expedite receipts and payments for the buying company.

Shipping information details all of your shipping transactions on Oracle iSupplier Portal. You can create or cancel shipment notices as well as view shipment delivery schedules and overdue shipment receipts.

The shipping information section includes:

Using Advance Shipment Notices and Advance Shipment Billing Notices

Whenyou enter an Advance Shipment Notice (ASN) or Advance Shipment Billing Notice (ASBN), you alert the buying company of upcoming shipment deliveries. To create an ASN or ASBN, select the purchase order shipments being shipped and provide the appropriate shipment details.

The details that can be specified on an ASN/ASBN include:

Shipment Lines

- Shipment Line Defaults:
  - Packing Slip
  - Country of Origin

    - Bar Code Label
    - Container Number
    - Truck Number
    - Comments

- Shipments in Advance Shipment Notices

    Note: In the Shipments in Advance Shipment Notices section, to view Details, click Show. To hide details, click Hide.

Shipment Headers

- Shipment Information (Required fields are marked with *)
    - Shipment Number*
    - Shipment Date*
    - Expected Receipt Date*

- Freight Information
    - Freight Terms
    - Number of Containers
    - Freight Carrier
    - Waybill/Airbill Number
    - Bill of Lading
    - Packaging Code
    - Packing Slip
    - Tar Weight
    - Special Handling Code
    - Net Weight
    - Tar Weight UOM

- Comments
- Net Weight UOM

You can enter billing information on a shipment notice to create an ASBN. An ASBN creates an invoice in the buyer's payables system. To create an ASBN, in addition to the above details, the following billing details should be provided (Required fields are marked with *):

- Invoice Number*
- Invoice Amount*
- Invoice Date*
- Payment Terms
- Freight Amount
- Currency
- Tax Amount
- Remit To Site

The Advance Shipment Notices section includes:

- Creating Advance Shipment Notices and Advance Shipment Billing Notices, page 5-4
- Uploading Advance Shipment Notices and Advance Shipment Billing Notices, page 5-8
- Canceling Advance Shipment Notices and Advance Shipment Billing Notices, page 5-9

Creating Advance Shipment Notices and Advance Shipment Billing Notices

You can create advance shipment notices and advance shipment billing notices using PO shipment lines.

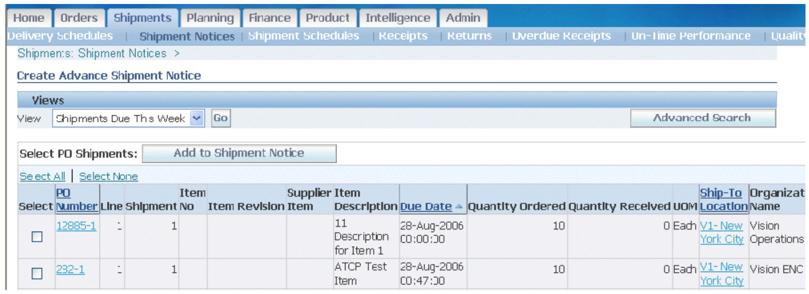
To create advance shipment notices and advance shipment billing notices:

1. Click the Shipments tab, and then click Shipment Notices in the task bar directly below the tabs.
2. On the **Shipment Notices** page, click Create Advance Shipment Notices for an ASN

or Create Advance Shipment Billing Notice for an ASBN.

> **Note:** If you are creating an ASBN, all selected shipments must belong to the same operating unit.

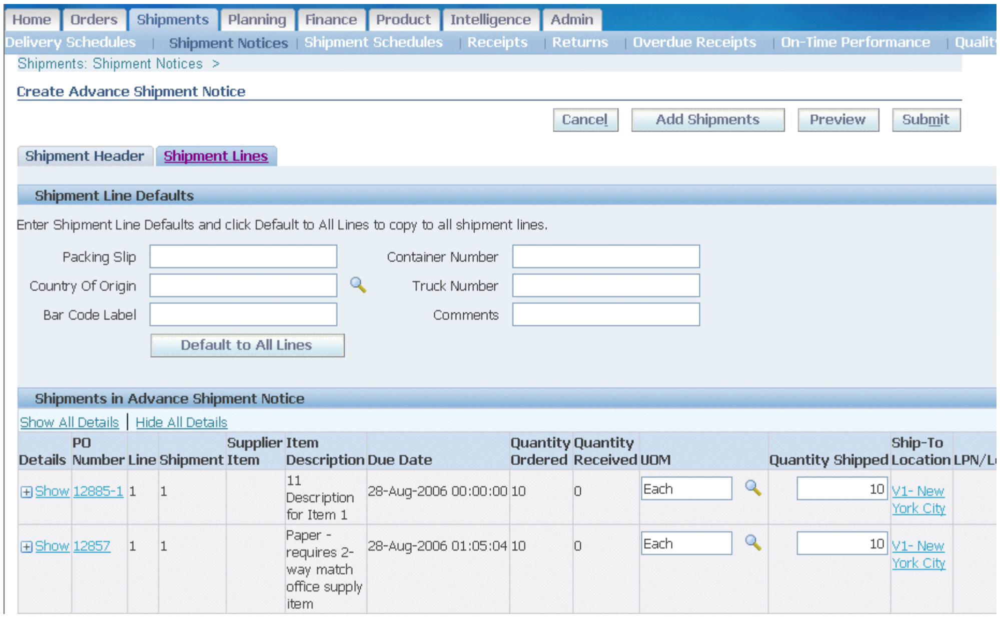
Create ASN Page



3. Select either View Shipments Due This Week or View Shipments Due Any Time, and then click Go. Click Advanced Search to enter additional search criteria to perform a more restrictive search .

4. Select one or multiple purchase order shipments, and then click Add to Shipment Notice.

Add to Shipment Notice Page



5. On the **Create Advance Shipment Notice** or **Create Advance Shipment Billing Notice** page, enter the appropriate shipment line defaults.

   > **Note: Note:**You can always add more shipments by clicking Add Shipments on the **Shipments Line** page.

6. You can enter the line details once for all shipment lines if the details are common to all lines. To copy all default shipment lines, click Default to All Lines.

7. To split a shipment line, click the split icon in the Shipments in Advance Shipment Notice section, and enter Shipping Quantity for the original and new lines.

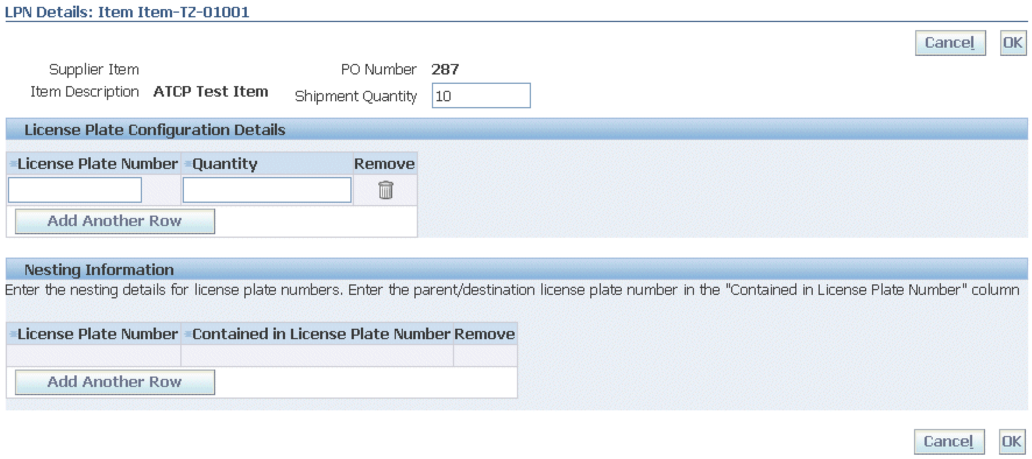
8. To remove a shipment, click the remove icon in the Shipments in Advance Shipment Notice section.

   > **Note:** To display shipment details, click Show in the Shipment and Advance Shipment Notice section. To hide shipment details, click Hide in the Shipment and Advance Shipment Notice section.

9. If you would like to enter Licence Plate Number (LPN), Lot, or Serial Information, click the LPN/LOT/serial icon.

You will be able to enter lot and serial information for shipment lines only when the item has been defined as a lot or serial controlled item. You will only be able to enter lot information if the item is lot controlled, serial information if the item is serial controlled, and both lot and serial information if your item is a lot and serial controlled.

LPN Details page



To enter details for a lot and serial controlled item:

1. Enter lot information. If you would like to add additional lot attributes, click the lot attributes icon.

2. If you would like to enter serial details for the lot, click Show, and then enter serial information. If you would like to add additional serial attributes, click the serial attributes icon.

3. If you have more than one lot or serial controlled item, click Add Another Row.

4. If you have LPNs nested within each other, enter nesting details in the License Plate Configuration Details section.

    Note: You may change the total shipment quantity on the **LPN/Lot/Serial Detail** page. The total shipment quantity entered should be equal to the total lot/serial quantity.

5. When you are finished entering your LPN/Lot/Serial details, click OK.

6. Click Shipment Headers. Enter the required ASN or ASBN information.

    You can also enter other information. The information you enter at the header level is transferred to the line level. (However, changes you make at the line level override information at the header level).

    If you are entering an ASBN, you must enter the following billing information:

- Invoice number
- Invoice date
- Invoice amount

  In the Remit-To site section, verify that the Remit To Site details are correct. If the Remit to Site details need to be changed, click Change, select the correct Remit To Site details, and then click Apply.

7. To preview the ASN or ASBN, click Preview.

8. Review the ASN or ASBN and click Submit.

Uploading Advance Shipment Notices and Advance Shipment Billing Notices

If you have a large volume of ASNs or ASBNs, you may create a spreadsheet containing shipment details and upload it into your buying company's system. Using the spreadsheet template in iSupplier Portal, you can create shipment notices offline, and then upload the file.

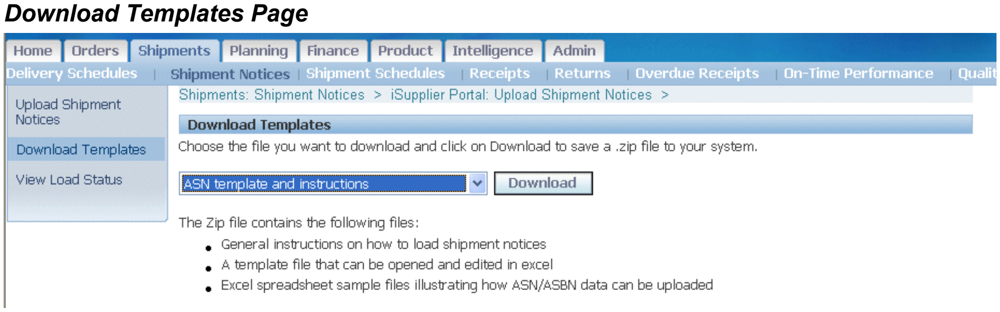
To download instructions on how to upload ASN and ASBNs:

1. Click the Shipments tab, and then click Shipment Notices in the task bar directly below the tabs.

2. Click Upload Advanced Shipment and Billing Notice

3. On the **Upload Shipment Notices** page, click Download Templates for instructions on uploading an ASN or ASBN.

Download Templates Page



4. On the **Download Templates** page, choose the file you want to download and click Download. You may choose from the following files to download:

- ASN Template and Instructions - Contains instructions for uploading ASNs, a sample ASN spreadsheet file, and the template to use when entering ASN information offline.

- ASBN Template and Instructions - Contains instructions for uploading ASBNs, a sample ASBN spreadsheet file, and the template to use when entering ASBN information offline.

- Valid List of UOM, freight terms, etc.... - A list of values including country of origin, UOM, freight, carriers, payments terms, etc. is provided. You should use these values when creating your ASN/ASBN file.

- Zip, All Files - Contains instructions for uploading ASNs, ASBNs, samples of ASN and ASBN spreadsheet files, templates to use while entering ASN and ASBN information offline, and lists of values.

5. Complete the templates according to the instructions. Save your completed file locally.

6. To upload your template, return to the Upload Shipment Notices page, browse for your completed template and upload it.

Canceling Advance Shipment Notices and Advance Shipment Billing Notices

When you cancel an ASN or ASBN, the system sends a notification to the buyer. You can always reenter an ASN for the same purchase order shipments at a later time. When you cancel an ASBN, both the shipment notice and corresponding invoice that was issued in the buyer's payable system are canceled.

To cancel a submitted advance shipment notice or advance shipment billing notice:

1. Click the Shipments tab, and then click Shipment Notices in the task bar directly below the tabs.

2. On the **Shipment Notices** page, click View/Cancel Advance Shipment Notices.

3. On the **View/Cancel Advance Shipment Notices** page, search for and select the advance shipment notice you would like to cancel.

   Note: You can use the advanced search feature to narrow your search.

4. Click Cancel Shipment Notice. A notification of your cancellation is sent to the buyer.

Note: Canceling a shipment notice cannot be undone. An ASN cannot be canceled if any of the lines have been received by the buying company. You can cancel an ASBN if none of the lines has been received and the invoice has not been paid by the buying company.

Uploading Routing Requests

If your buying company is responsible for arranging the packing and shipping of materials, you may need to submit a routing request. A routing request notifies your buyer when goods are ready for shipment. You may upload a routing request using a spreadsheet template.

To download instructions on how to upload a routing request:

1. Click the Shipments tab, and then click Shipment Notices in the task bar directly below the tabs.
2. On the **Shipment Notices** page, click Create Routing Requests.
3. On the **Upload Routing Requests** page, click Download Template.

The Readme file included in the download will provide instructions on how to upload your routing request.

Viewing Routing Responses

You may view buyer responses to your routing requests. From the **Shipment Notices** page, click View Routing Responses. On the **Routing Response** page, you may search for routing responses (after your buyer has responded to them). You may search using the following search criteria:

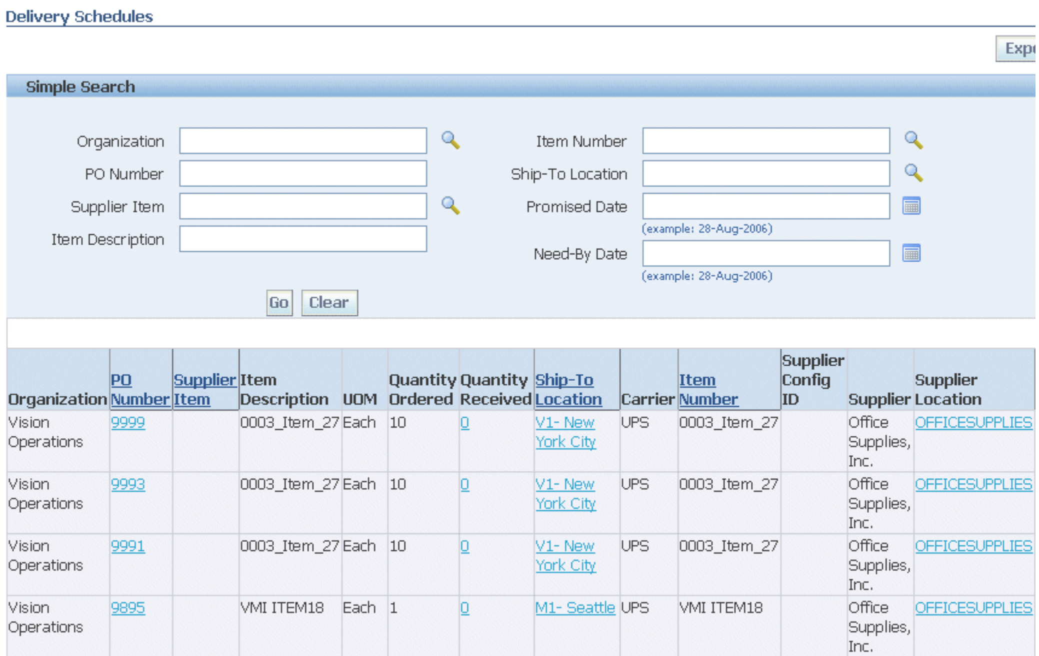
- Response Number
- Routing Number
- PO Number
- Ship-From
- Ship-To
- Pick Up Time

When you have found the routing response you would like to view, click the response number for details.

Viewing Delivery Schedules

You can use the **Delivery Schedules Results** page to quickly determine deliveries that need to be scheduled and deliveries that are past due. Click the purchase order number, receipt quantity, and ship-to location links to view further detail.

Delivery Schedules Results Page


Delivery Schedules

Expo

Simple Search

Organization

PO Number

Supplier Item

Item Description

Item Number

Ship-To Location

Promised Date

(example: 28-Aug-2006)

Need-By Date

(example: 28-Aug-2006)

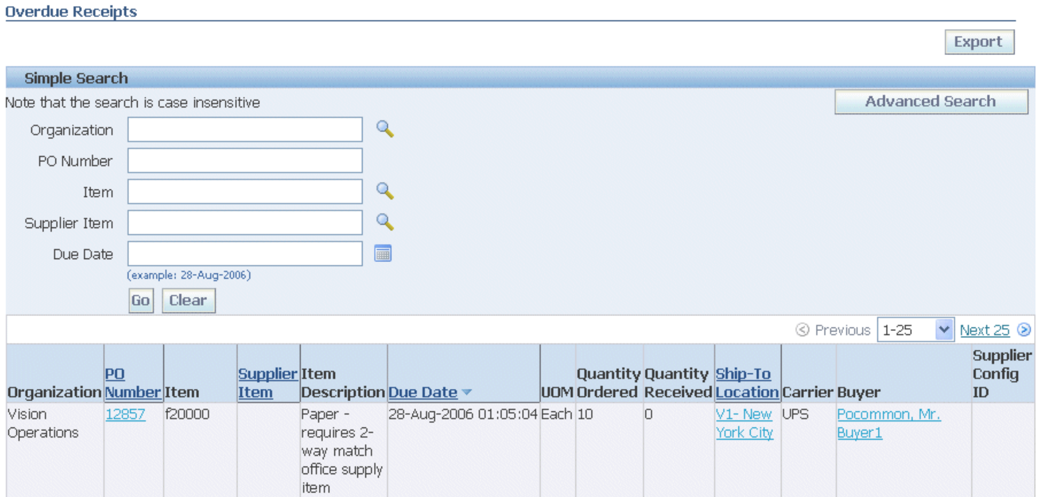
Go Clear

Organization	PO Number	Supplier Item	Item Description	UOM	Quantity Ordered	Quantity Received	Ship-To Location	Carrier	Item Number	Supplier Config ID	Supplier	Supplier Location
Vision Operations	9999		0003_Item_27	Each	10	0	V1- New York City	UPS	0003_Item_27		Office Supplies, Inc.	OFFICESUPPLIES
Vision Operations	9993		0003_Item_27	Each	10	0	V1- New York City	UPS	0003_Item_27		Office Supplies, Inc.	OFFICESUPPLIES
Vision Operations	9991		0003_Item_27	Each	10	0	V1- New York City	UPS	0003_Item_27		Office Supplies, Inc.	OFFICESUPPLIES
Vision Operations	9895		VMI ITEM18	Each	1	0	M1- Seattle	UPS	VMI ITEM18		Office Supplies, Inc.	OFFICESUPPLIES

Viewing Overdue Receipts

The **Overdue Receipts Results** page enables you to view the details of past due purchase order shipments. Click the PO number, Ship-To Location, and Buyer to view further detail.

Overdue Receipts Results Page



Receiving Information

Receiving information enables you to view your receipts, returns, and delivery performance.

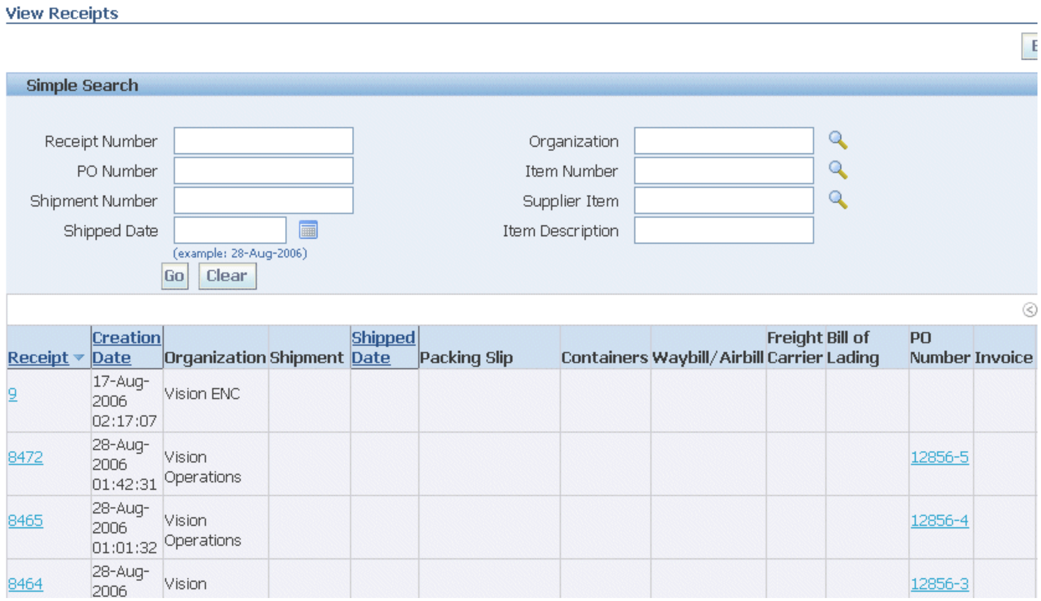
The receiving information section includes:

- Viewing Receipts, page 5-12
- Viewing Returns, page 5-14
- Viewing On-Time Delivery Performance, page 5-14

Viewing Receipts

The **View Receipts** page enables you to explore a historical view of all receipts that have been recorded for your shipped goods.

View Receipts page



1. On the **View Receipts** page, enter a value in one of the search fields to retrieve the receipt information. Optionally use the Advanced Search , page 3-7 function to specify more complex search criteria.

2. The **View Receipts** redisplays, listing the receipts who matched your search criteria.

3. To view the information on a particular receipt, click the receipt number link.

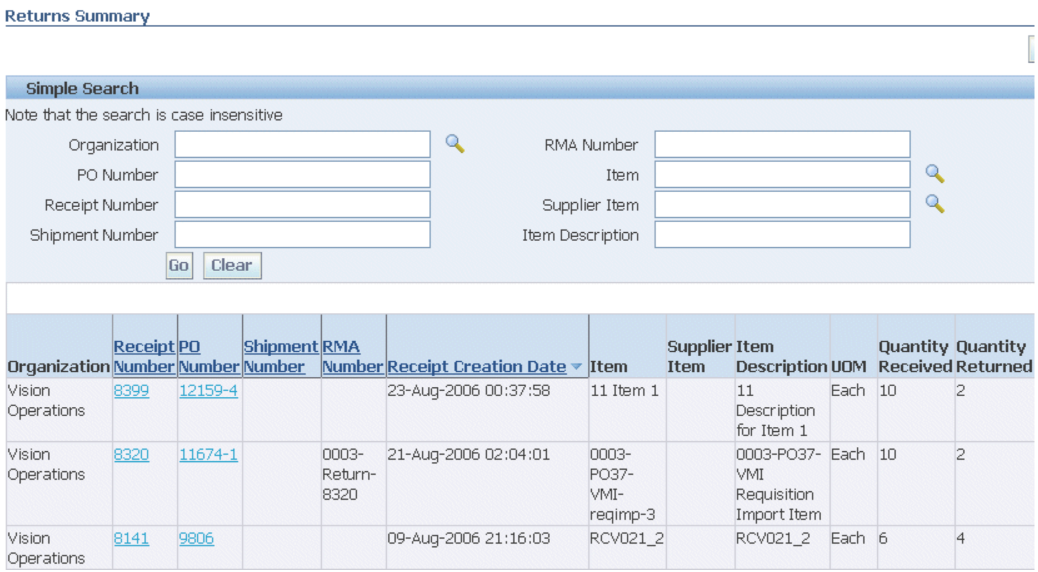
4. The **Receipt:** details page displays information on that particular receipt. From this page, there are links to display

   - ASN/ASBN
   - PO information
   - Invoice information
   - Return information
   - On Time Performance information
   - Defect information

Viewing Returns

The **Returns Summary** page enables you to view the return history, the causes for goods returned by the buying company, and inspection results of a shipment. The search summary results include basic information along with details about the return, such as quantities and a reason for return. Click Receipt Number and PO Number to view further detail.

Returns Summary page

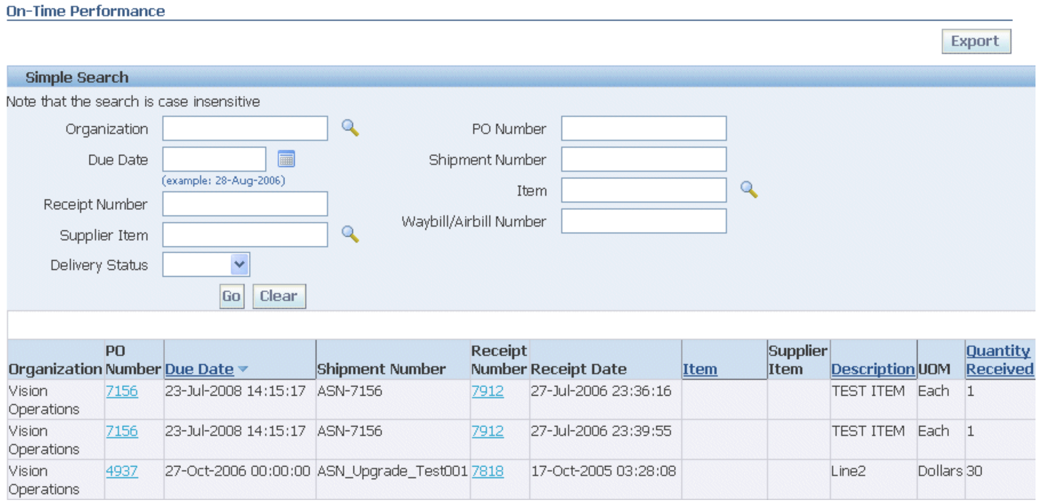


Organization	Receipt Number	PO Number	Shipment Number	RMA Number	Receipt Creation Date	Item	Supplier Item	Item Description	UOM	Quantity Received	Quantity Returned
Vision Operations	8399	12159-4			23-Aug-2006 00:37:58	11 Item 1		11 Description for Item 1	Each	10	2
Vision Operations	8320	11674-1		0003-Return-8320	21-Aug-2006 02:04:01	0003-PO37-VMI-reqimp-3		0003-PO37-VMI Requisition Import Item	Each	10	2
Vision Operations	8141	9806			09-Aug-2006 21:16:03	RCV021_2		RCV021_2	Each	6	4

Viewing On-Time Delivery Performance

The **On-Time Performance** page provides the delivery status of shipments you made against purchase orders. You can view your performance for timeliness of deliveries. Click the PO Number and Receipt Number to view further details.

On-Time Performance Page



On-Time Performance

Export

Simple Search

Note that the search is case insensitive

Organization

Due Date

(example: 28-Aug-2006)

Receipt Number

Supplier Item

Delivery Status

Go Clear

PO Number

Shipment Number

Item

Waybill/Airbill Number

Organization	PO Number	Due Date	Shipment Number	Receipt Number	Receipt Date	Item	Supplier Item	Description	UOM	Quantity Received
Vision Operations	7156	23-Jul-2008 14:15:17	ASN-7156	7912	27-Jul-2006 23:36:16			TEST ITEM	Each	1
Vision Operations	7156	23-Jul-2008 14:15:17	ASN-7156	7912	27-Jul-2006 23:39:55			TEST ITEM	Each	1
Vision Operations	4937	27-Oct-2006 00:00:00	ASN_Upgrade_Test001	7818	17-Oct-2005 03:28:08			Line2	Dollars	30

Quality Information

Entering quality information online enables paperless transactions for required quality standards. You can only enter quality information if the buying company has Oracle Quality and you have permission.

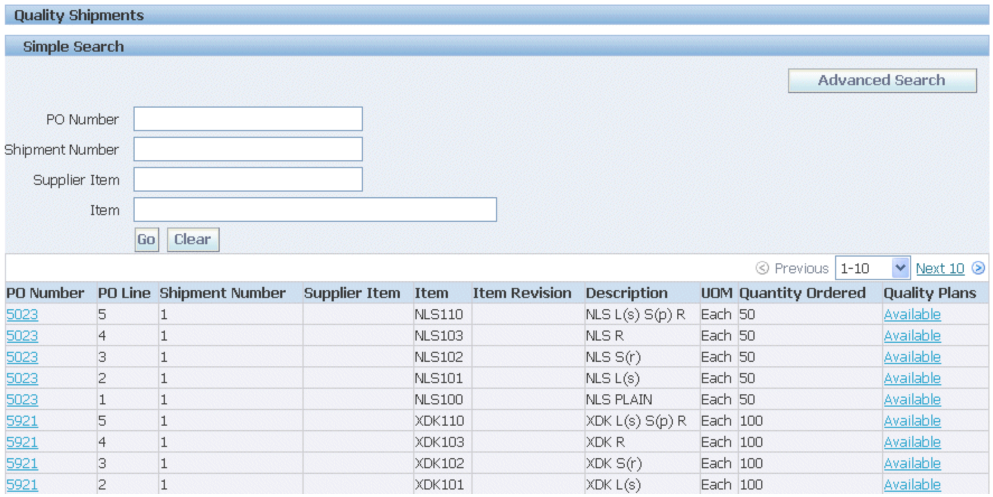
You first create a Quality Collection Plan in Oracle Quality and associate the plan with the Self-Service Quality for outside processing transactions. You enter quality information to communicate to your buyer if your item meets the quality standards required. For example, an electrical motor supplier performs a detailed electrical test on each motor. That supplier can enter the quality data gathered from each test and enter that information online in Oracle iSupplier Portal prior to shipping the motor. Quality engineers can evaluate the results and stop the shipment of any motors that do not meet the requirements.

The system displays an available link in the Quality Plans column. Clicking this link displays a list of collection plans associated with your purchase order. You can enter quality results, view quality results submitted, or view attachments for any purchase order listed.

The **Quality Shipments** page displays purchase order and shipping information for any purchased item being shipped, but only for open jobs that also have at least one collection plan assigned to them. You can obtain the shipment number, ship-to location, and ship-to organization. You can also download quality collection plans, and collect and submit quality data regarding your shipments.

1. On the Shipments tab, click Quality in the task bar directly below the tabs.

Search - Quality Shipments Page



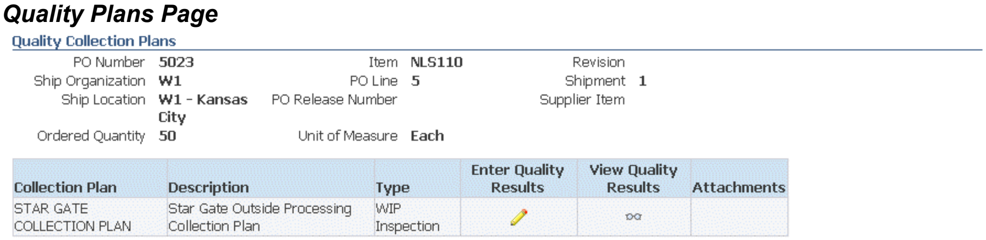
PO Number	PO Line	Shipment Number	Supplier Item	Item	Item Revision	Description	UOM	Quantity Ordered	Quality Plans
5023	5	1		NLS110		NLS L(s) S(p) R	Each	50	Available
5023	4	1		NLS103		NLS R	Each	50	Available
5023	3	1		NLS102		NLS S(r)	Each	50	Available
5023	2	1		NLS101		NLS L(s)	Each	50	Available
5023	1	1		NLS100		NLS PLAIN	Each	50	Available
5921	5	1		XDK110		XDK L(s) S(p) R	Each	100	Available
5921	4	1		XDK103		XDK R	Each	100	Available
5921	3	1		XDK102		XDK S(r)	Each	100	Available
5921	2	1		XDK101		XDK L(s)	Each	100	Available

2. On the **Search - Quality Shipments** page, search for a shipment.

3. Click Available in the Quality Plans column for the appropriate shipment.

4. On the **Quality Plans** page, click the enter quality results icon. To view existing quality results, click the view quality results icon. To view attachments, click the attachment icon.

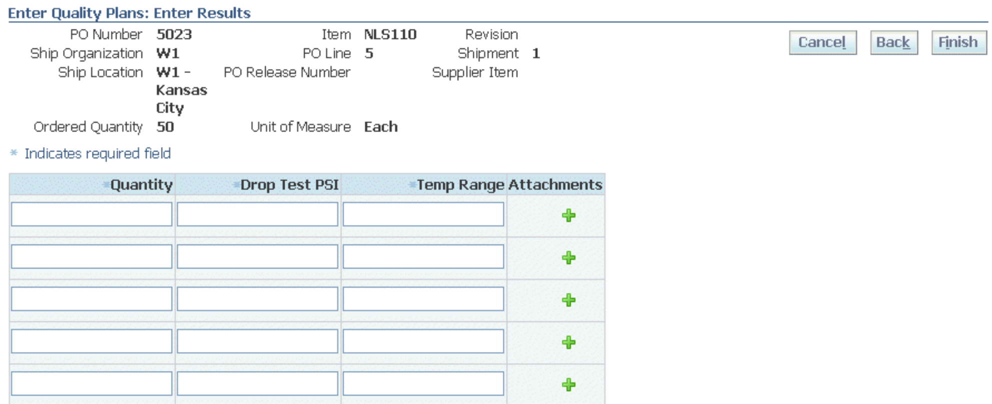
Quality Plans Page



Collection Plan	Description	Type	Enter Quality Results	View Quality Results	Attachments
STAR GATE COLLECTION PLAN	Star Gate Outside Processing Collection Plan	WIP Inspection			

1. On the **Enter Test Results** page, enter a number and click Continue. (You can only complete this task if you have permission).

Enter Quality Results Page



2. On the **Enter Quality Results** page, enter your quality information (the fields available to enter data vary depending on the type of information you need to enter) and click Submit. You can enter up to 25 rows of quality data at a time.

3. Once you have submitted all of the quality results, a notification is sent to the buyer.

   To send quality notifications to the buyer or recipient:

After you have saved and submitted all of your quality results, click Notification to notify the buyer or recipient that you have submitted results (if you have permission). You can only submit 25 rows of results at a time. If you are submitting more than 25 rows of results, for example 100 rows of results, you must submit your results four times.

> **Note:** To avoid sending duplicate notifications, click Notification only after you complete and submit all of your rows of data.

6

Planning and Inventory Information

This chapter covers the following topics:

- Overview
- Forecast informationForecast Information
- Product informationProduct Information
- Product informationsupplier item summaryViewing Supplier Item SummaryViewing supplier item summary
- Viewing ItemViewingitem inventory Inventory Information
- Maintaining Capacity informationCapacity Information
- Maintaining order modifiersMaintaining Order Modifiers
- Vendor Vendor Managed InventoryManaged Inventory
- ConsignedConsigned inventory Inventory

Overview

Oracle iSupplier Portal enables you to view demand forecasts from the buying company. Using your item number, you can view different transactions. You can also maintain certain item information such as manufacturing and order modifiers. Oracle iSupplier Portal enables you to perform vendor managed inventory or track consigned inventory stock. You also can maintain your orders and capacity information on the system.

This chapter includes the following:

- Forecast Information, page 6-2
- Product Information, page 6-2
- Vendor Managed Inventory, page 6-8

- Consigned Inventory, page 6-9

Forecast Information

Forecast information enables you to view real-time forecasts from the buying company. You can view plans, arranged by schedules, that communicate expected demand over different time horizons. You can see all available schedules and select the schedule number to view further details. The Planning tab allows you to view plans that communicate forecast information. You can also view forecast schedules. A summary of schedules is displayed and you can select each schedule to view details. Click the Schedule Number for further information.

The **Planning Schedule Summary** page displays forecast information for all items. To view forecast information for all items on a single page, click the summarized view icon.

Product Information

Using the Product tab, you can easily access and view information about the products you provide sorted by item.

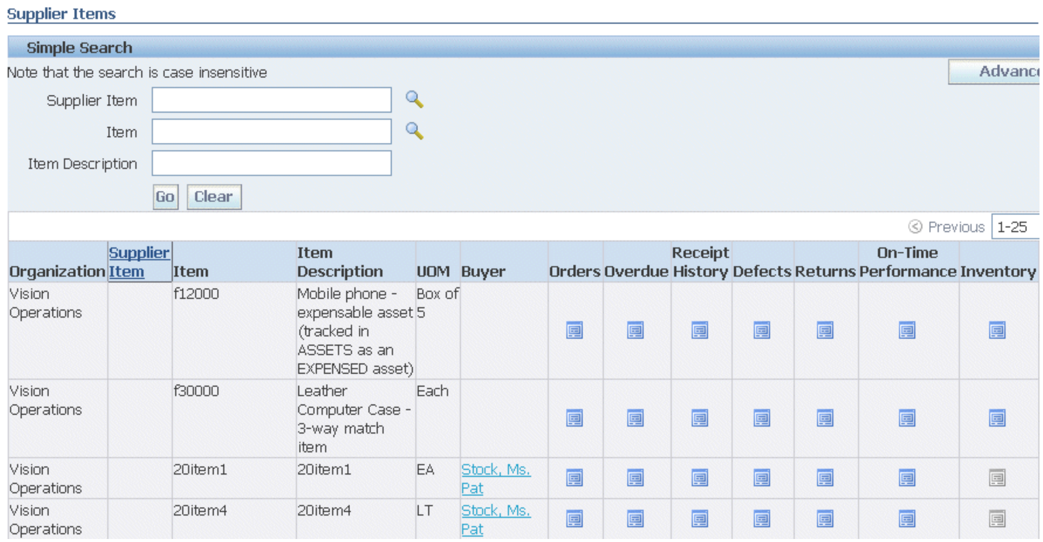
The product information section includes:

- Viewing Supplier Item Summary, page 6-2
- Viewing Item Inventory Information, page 6-4
- Maintaining Capacity Information, page 6-5
- Maintaining Order Modifiers, page 6-7

Viewing Supplier Item Summary

The **Supplier Items** page enables you to view all of the details of the products that you supply. You can view your search results in a summary format with links on each line for:

Supplier Items Page



Orders

A summary of order lines placed with you for this item. This summary includes quantity ordered, quantity received, and price break information. Click PO Number, Ship-To Location, and Buyer for further information.

Overdue

A summary of overdue receipts for the selected item. Click PO Number and Receipt Number for further information.

Receipt History

A summary of receipts for the selected item. Click PO Number and Receipt Number for further information.

Defects

A summary view of failed inspection items.

Returns

A summary view of returns for an item that includes shipment information, RMA number, and quantities. Click PO Number and Receipt Number for further information.

On-Time Performance

A summary of receipts for an item that includes due dates, receipt dates, and shipping information. Click PO Number and Receipt Number for further information.

Inventory

The **On-Hand** page provides more details about the item, on-hand quantity, and links to both. Revision history and sub-inventory breakdown of the on-hand quantity (with locator, lot, and serial).

Vendor Managed Inventory

A summary view of vendor managed items that includes supplier, item shipment notice, and buyer information.

Consigned Inventory

A summary view of consigned items including item, shipment, and transaction information. Click the appropriate icon for further information.

Most of the summaries are available to export.

Viewing Item Inventory Information

The **On-Hand Items** page enables you to view your item inventory information. Viewing your item inventories enables you to view on-hand inventories, item locations, lots, and serials.

To view item inventory information:

1. Click the Product tab, click Supplier Item in the task bar directly below the tabs.
2. Search for an item.
3. On the **Supplier Items Result** page, select your item and click the inventory icon.
4. Click Revision to view any revisions made to an item.

On-Hand Items Page

On-Hand Items

Organization	Item	Item Description	UOM	Quantity	Revision	Subinventory
Vision Operations	f30000	Leather Computer Case - 3-way match item	Ea	10		

5. Click the Subinventory icon to view subinventory information for an item.
6. Click the Locator, Lot, or Serial icon to view any specific item information.

On-Hand items Subinventories Page

On-Hand Items Subinventories

Organization	Item	Item Description	Subinventory	Item Revision	Nettable	Reservable	UOM	Quantity	Locator	Lot	Serial
Vision Operations	f30000	Leather Computer Case - 3-way match item	Stores		*	*	Ea	10			

7. Click Export to download your inventory information.

Maintaining Capacity Information

You can accurately maintain your delivery capacity online. Your buying company 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.

You can update your capacity abilities for various items for which you are an approved supplier. You can use the **Order Modifiers** page to define processing lead times, fixed lot multiples, and minimum order quantities. You can also define tolerance fences by Days in Advance and Tolerance on the **Maintain Capacity** page. Once your updates are submitted, the company's buyer is notified and their approved supplier list is updated with your information. The company can then better allocate planned orders taking allocation and current capacities into account.

You can update the following capacity constraints for each item that has been sourced to you:

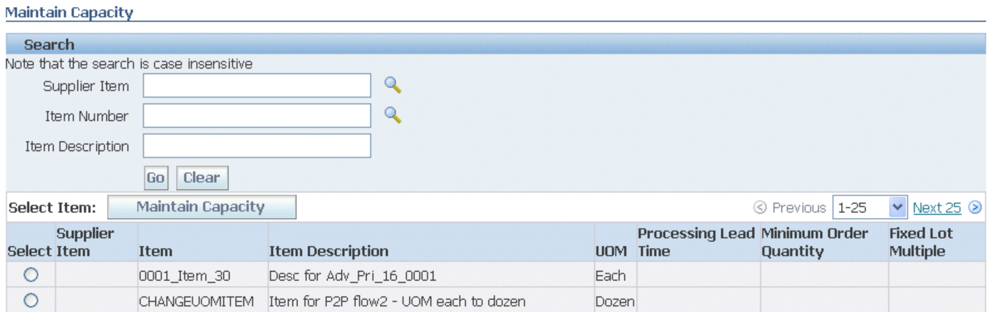
- Processing lead time
- Order modifiers: minimum order quantity and fixed lot multiple
- Capacity per day for a range of effective date
- Tolerance fences: tolerance percentage and days in advance

After you change capacity information, a notification is sent to the planner and the buyer. Based on the preference set by the buying company, the information may go through an approval from a buyer or planner. You will be notified of the status of the request.

To maintain capacity information:

1. Click the Product tab, click Maintain Capacity in the task bar directly below the tabs.
2. On the **Maintain Capacity** page, enter search criteria information.

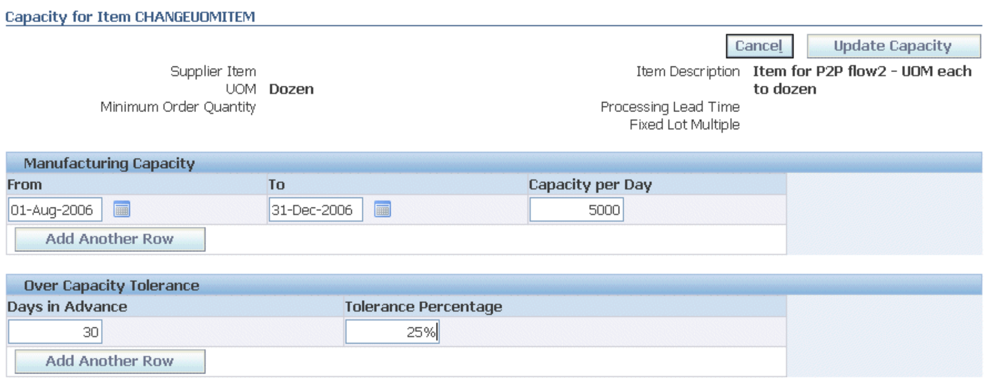
Maintain Capacity Page



3. Click Search. (You can perform a blind search by clicking Search without entering any criteria. This results in all items assigned to you being displayed).

4. Select your item and click Maintain Capacity.

Capacity of Item Page



> **Note:** The **Maintain Capacity** page displays information from today's date forward. You can modify the current defined capacity or create new entries by clicking Add Another Row.

5. You can also add or modify the Over Capacity Tolerance by changing existing Days in Advance and Tolerance values.

> **Note:** To add additional Over Capacity Tolerance information, click Add Another Row.

6. When you have completed your update, click Update Capacity. An Update Capacity Confirmation message is displayed.

Maintaining Order Modifiers

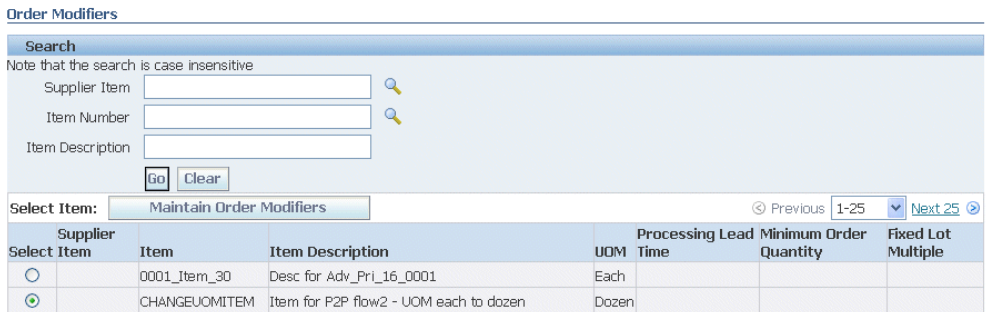
Maintaining order modifiers enables you to view and make changes to the details of your ability to fulfill purchase orders scheduled for delivery. You can view shipment processing lead times, minimum order quantities, and fixed lot multiples. You can then adjust these to fit your delivery ability.

To maintain order modifiers:

1. Click the Product tab, click Order Modifiers in the task bar directly below the tabs.

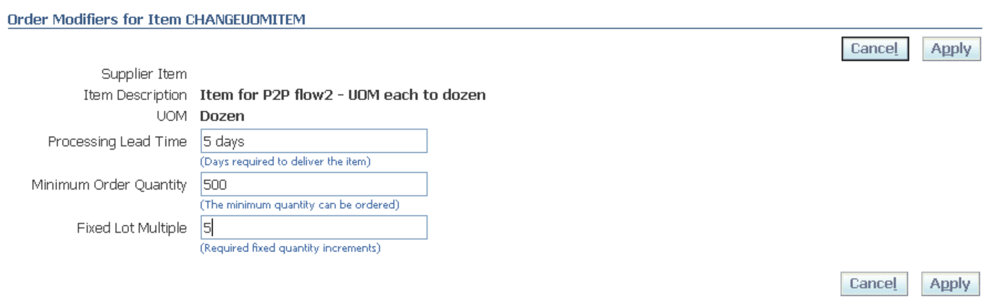
2. On the **Order Modifiers** page, enter search criteria information and click Go.

Order Modifiers Page



3. Select your item and click Maintain Order Modifiers.

Maintain Order Modifiers Page



4. On the **Order Modifiers for Item** page, you can add or modify the following item attribute values:

   - Processing Lead Time (in days)

   - Minimum Order Quantity

   - Fixed Lot Multiple

5. Click Submit.

The item is immediately updated with the changes and an information notification is sent to the planning manager or buyer of the item. They can verify your changes in their approved supplier list.

> **Note:** You can erase any changes before submitting your request by clicking Cancel.

Vendor Managed Inventory

Vendor Managed Inventory enables you to manage the inventory at the customer's 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, you can view these minimum and maximum levels and also view the current on-hand quantities for that item at the customer location. You have the option of triggering the replenishment requests from this page to ensure that the stock quantity is maintained at the customer location.

On the Product tab, on the **Supplier Item Results** page, click the VMI icon. From the **Vendor Managed Inventory Status** page, your search results are displayed with detailed information about the status of each item you included in your search and links to enter replenishment information. You then initiate replenishment requests for the item.

> **Note:** You can save searches that you use frequently by clicking Personalize, entering your search criteria, and then saving by clicking Apply. Personalize also enables you to customize the information that is displayed when you view the **VMI Search** page.
>
> To generate supply requests:

1. Search for the items you are responsible for.

2. Review the replenishment method for the item.

3. If the method for the item is Buyer or Supplier Initiates Release; you then select the item, enter the quantity, and click Release.

4. If the method for the item is Manual Requisition; you click the enter requisition icon in the Create Requisition column. On the **Enter Order Details** page, enter a quantity, need-by date, and other details of the order as required by the customer.

Once you have completed and submitted the replenishment request, you will receive a confirmation message that contains the request identifier. You can use the request identifier to monitor the progress of your request.

You can override the quantity with either of the manual types of replenishment methods. For Automatic Release method items, you can click the enter replenishment icon in the Create Requisition column and enter a quantity.

Consigned Inventory

Oracle Procurement along with Discrete Manufacturing supports maintaining consigned inventory for an item. Buying companies can enable items to have consigned inventory. This enables you to maintain the stock at the buying company location. Buying companies do not incur financial liabilities until they start consuming the stock.

Oracle iSupplier Portal enables you to view on-hand stock for consigned items and also associated procure-to-pay transactions.

To view consigned items:

1. Click the Product tab, and then click Consigned Inventory in the task bar directly below the tabs.
2. On the **Consigned Inventory** page, search and select your item.
3. For a given item, suppliers can view the following information:
   - Supplier Item
   - Item
   - Item Description
   - Consigned On-Hand - Displays the on-hand stock levels for the item at the buying company.
   - Consigned Shipments - Displays the purchase order shipment details that enable the item to be shipped from you to the buying company location.
   - Consumption Orders - Displays the purchase orders/blanket releases that are created when consigned stock is consumed by the buying company. These are the orders against which you can submit invoices to the buying company.
   - Consigned Receipts - Displays the history of receipts for consigned stock.
   - Consigned Returns - Displays the history of return transactions created for the consigned stock.
   - Material Transactions - Displays the material transactions that occurred for the consigned item. It includes transactions to procure the item, which is the consigned stock, and then the transactions to move the stock to regular inventory for consumption.

If the consigned item is also enabled for Vendor Managed Inventory, suppliers can initiate replenishment requests online.

To view consigned inventory aging items:

1. Click the Product tab, and then click Consigned Inventory Aging in the task bar directly below the tabs.

2. On the **Consigned Inventory Aging** page, you may search for items that are past due, or items that are due in the next 7, 15, or 30 days. Select the appropriate search criteria for your item and click Go.

3. For a given item, suppliers can view the following information:

   - Supplier Site

   - Organization

   - Supplier Item

   - Item

   - Item Revision

   - Item Description

   - Subinventory

   - UOM

   - Quantity

   - Receipt Date

   - Consume Before - Date the item must be consumed.

   - Days Before Consumption is Due - Displays the number of days before the ownership of the item is transferred.

7

Invoice and Payment Information

This chapter covers the following topics:

Overview

You can access invoice and payment information as well as review invoice status online using Oracle iSupplier Portal. If the buying company uses Oracle Payables, you can also submit invoices online.

This section includes the following topics:

Submitting Invoices

If your buying company has implemented Oracle Payables, you may submit invoices online.

You can submit an invoice online to the buying company based on the purchase order lines you have fulfilled. You need to only identify those items shipped and enter a quantity. You can invoice against open, approved, standard, or blanket purchase orders that are not fully billed. You can enter a credit memo against a fully billed purchase order (use negative quantity amounts to enter a credit memo), as well as invoice against multiple purchase orders. However, the currency and organization of all items on an invoice must be the same. The organization is the entity within the buyer's company that you are invoicing.

You can also partially complete an invoice, save it, and submit it later.

After you submit an invoice, you cannot change the invoice. If you need to make adjustments to a submitted invoice, you can create a credit memo against the same purchase order items to net out the invoice charges. The purchase order will then be available for a new invoice.

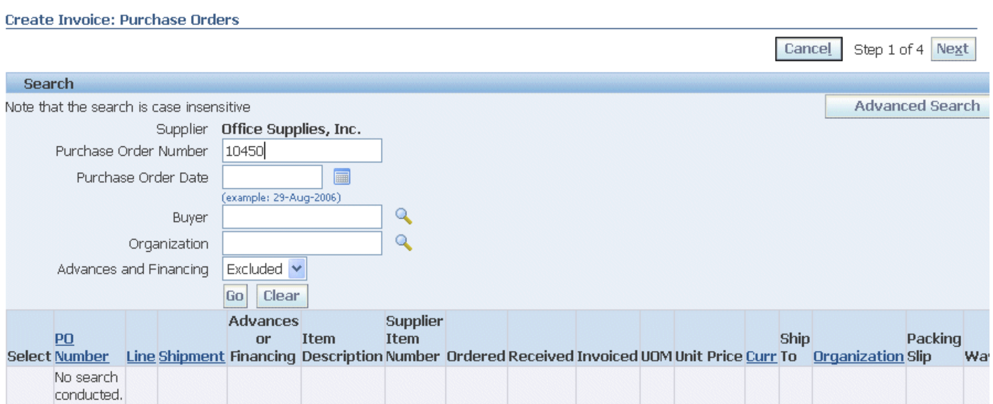
In some cases, there will be no matching purchase order. If you have provided a service, to the buying company, for example, landscape services, the buying company may not have submitted a formal purchase order. You can submit invoices in these cases as well.

To submit an invoice with a matching purchase order:

1. Click the Finance tab, and then click Create Invoices in the task bar directly below the tabs.

2. On the **Invoice Actions** page, select either With a PO from the Create Invoice Menu and click Go.

Create Invoices Select PO

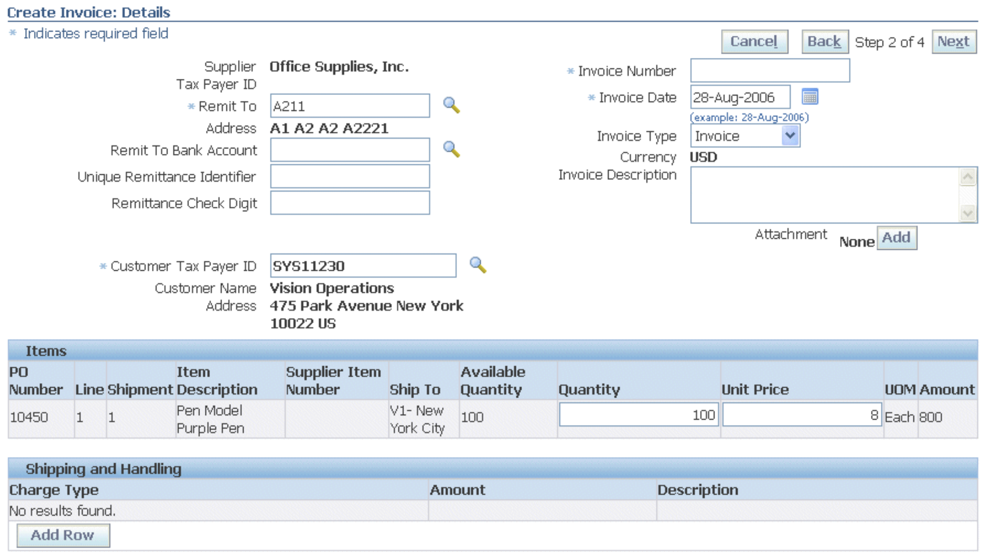


3. On the **Create Invoice: Purchase Orders** page, enter search criteria to identify the purchase order, and click Go.

4. Select items of the PO to be invoiced and click Add to Invoice. Add as many items as you need (items on your invoice display at the bottom of the page). If you mistakenly add an item to the invoice, you can select it and click Remove from invoice.

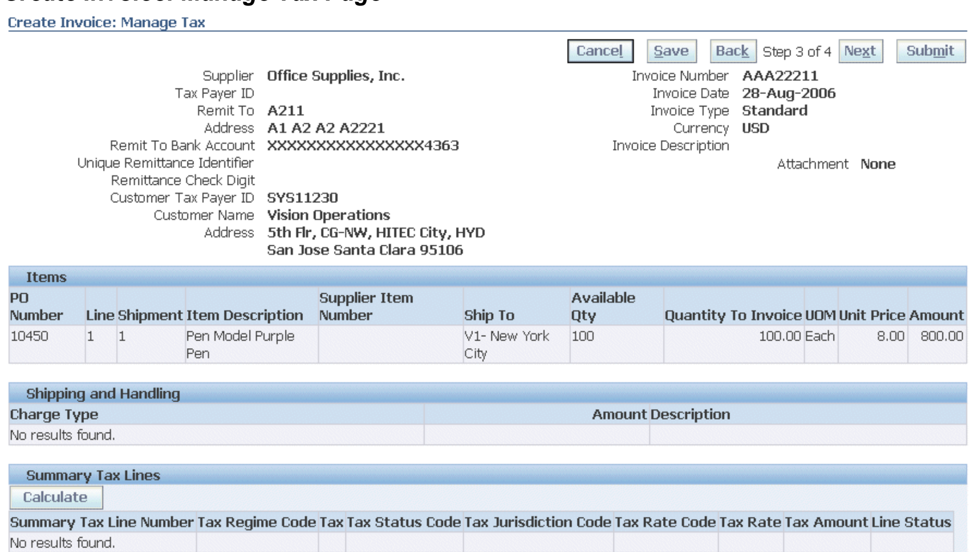
5. When finished adding items, click Next.

Create Invoice: Details Page



6. On the **Create Invoice: Details** page, enter an invoice number and remit to address. You can also update the quantity and/or price. Enter and any additional information, and then click Next.

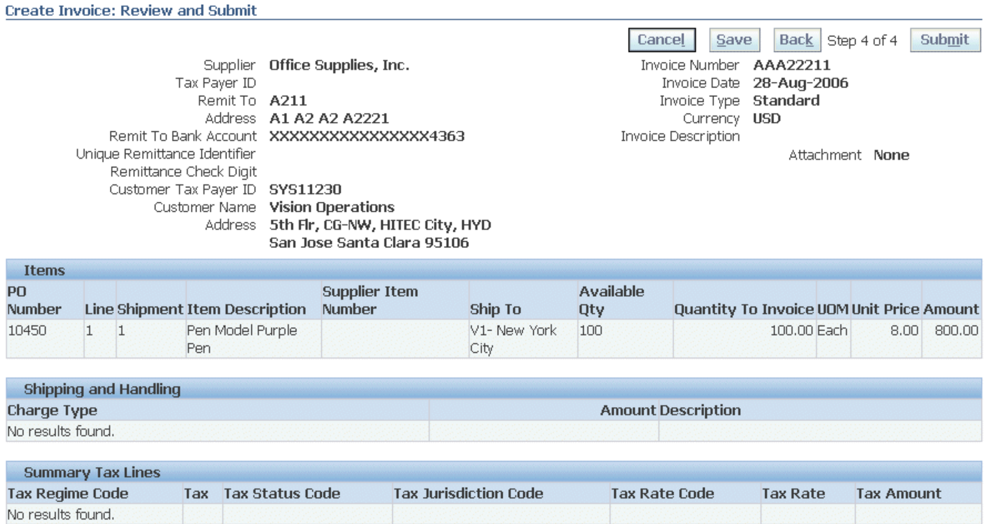
Create Invoice: Manage Tax Page



7. On the **Create Invoice: Manage Tax** page, you can view the tax information generated.

8. When finished, click Next.

Review/Submit Invoice Page



9. On the **Create Invoice: Review and Submit** page, review your invoice and click Submit. You also have the option to return to this invoice later by clicking Save for Later.

10. A **Confirmation** page is generated informing you of successful invoice creation. .

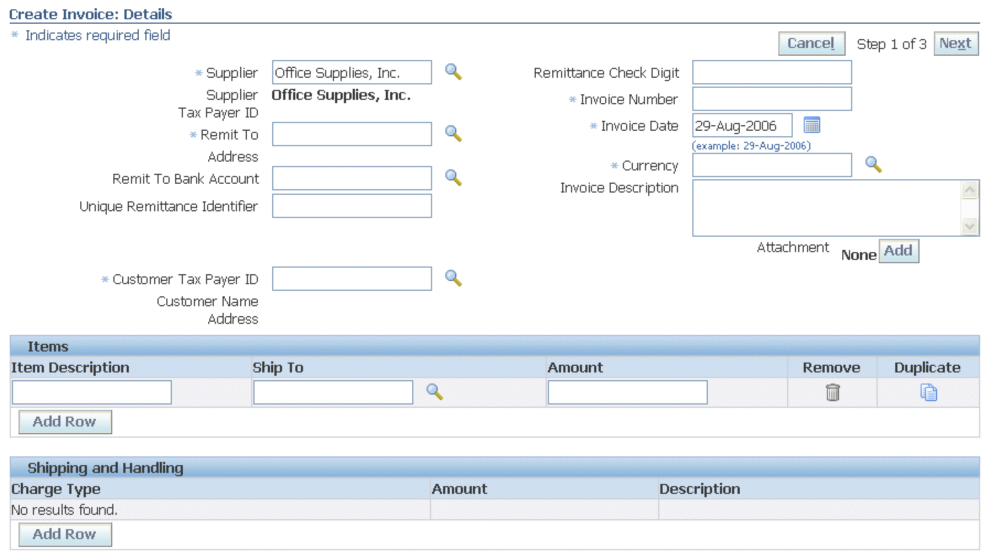
Creating an Invoice Without a Purchase Order

The process of creating invoices that do not have matching purchase orders is similar, although some information is not required, and some must be entered.

To create an invoice without a purchase order:

1. From the iSupplier Portal **Home** page, click the Finance tab.

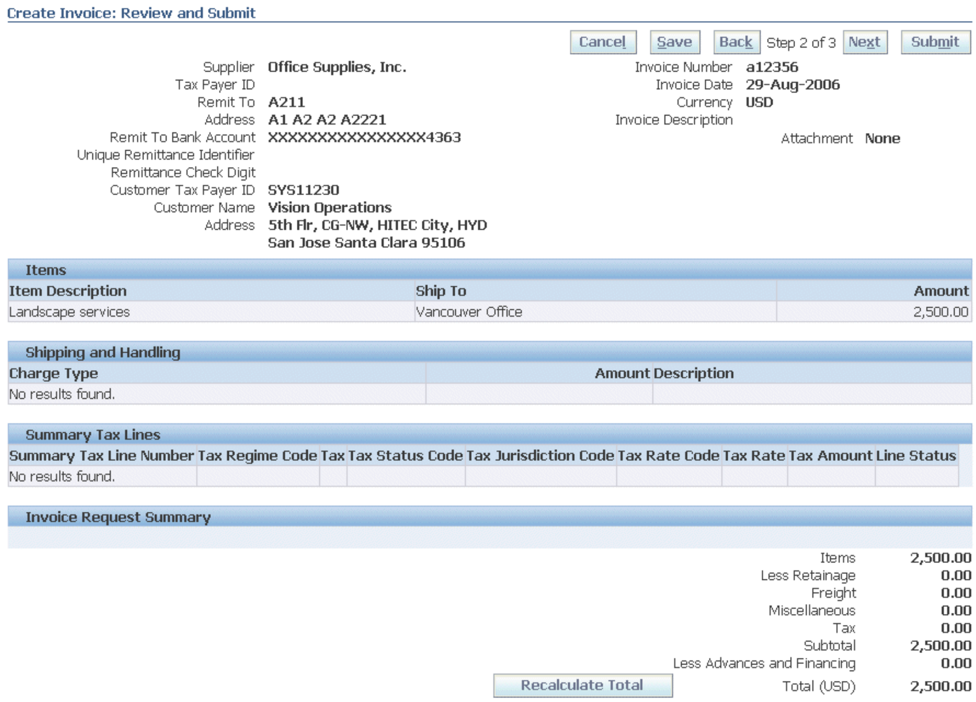
2. On the **Create Invoices** page, select Without PO from the Create Invoice menu, and click Go.



3. Enter information as needed. The following fields are required.

   - Invoice number
   - Remit to name
   - Currency
   - Customer tax payer ID

   Enter any other appropriate information. Use the Items fields to identify and describe the item or service for which you are invoicing. When you are finished, click Next.



4. The Review and Submit page shows the tax information generated by the tax system. If the invoice information is correct, click Submit.

Viewing Invoice Information

The View Invoices page enables you to search for and view details of an invoice you have submitted. You can search using various any or all of the search criteria on the page such as:

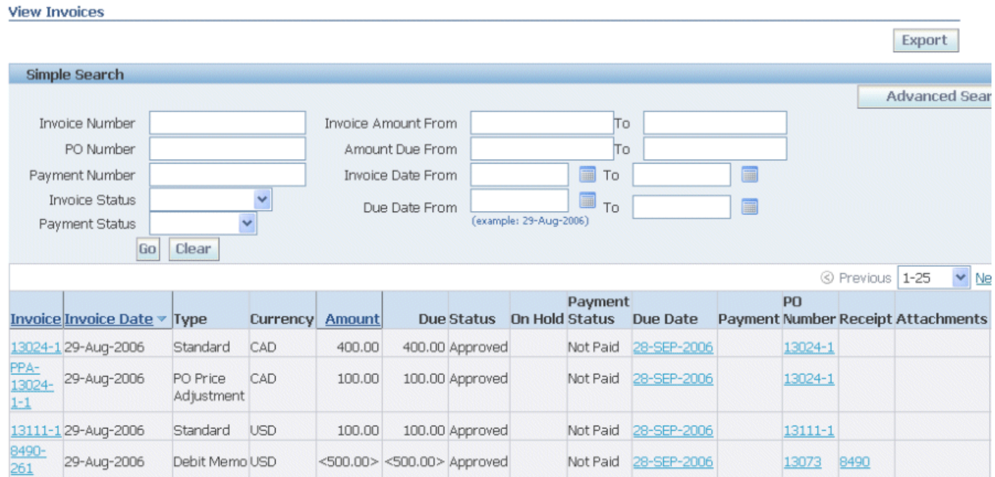
- Invoice Number
- Invoice date
- Due date
- Payment status
- Invoice Amount

To view invoice information:

1. On the iSupplier Portal Home page, click the Finance tab, then click the View Invoices subtab.
2. On the View Invoices page, enter search values into one or more of the search fields,

and click Go. Or use the Advanced Search option.

Invoice Summary Results Page



View Invoices

Export

Simple Search

Advanced Sear

Invoice Number | Invoice Amount From | To
PO Number | Amount Due From | To
Payment Number | Invoice Date From | To
Invoice Status | Due Date From | To
Payment Status | (example: 29-Aug-2006)

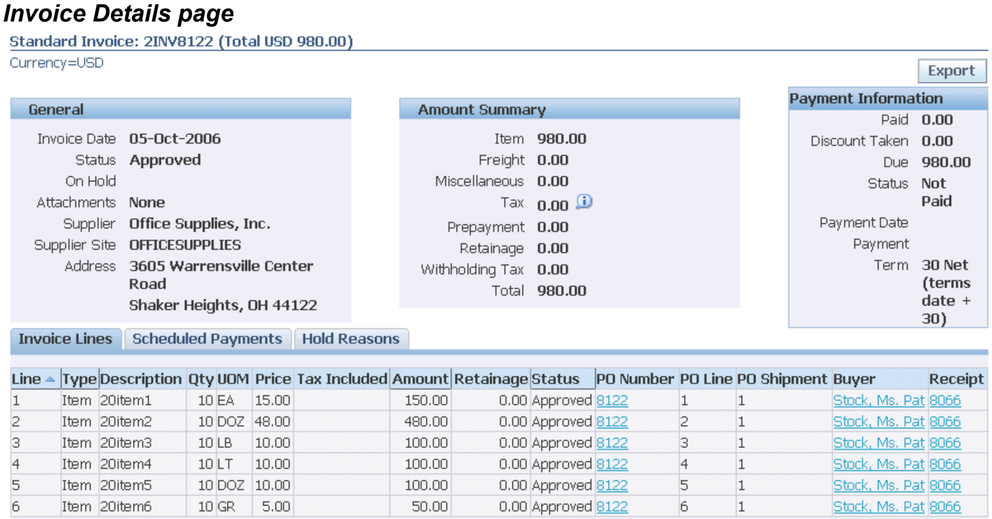
Go Clear

Previous 1-25 Ne

Invoice	Invoice Date	Type	Currency	Amount	Due	Status	On Hold	Payment Status	Due Date	Payment	PO Number	Receipt	Attachments
13024-1	29-Aug-2006	Standard	CAD	400.00	400.00	Approved		Not Paid	28-SEP-2006		13024-1		
PPA-13024-1-1	29-Aug-2006	PO Price Adjustment	CAD	100.00	100.00	Approved		Not Paid	28-SEP-2006		13024-1		
13111-1	29-Aug-2006	Standard	USD	100.00	100.00	Approved		Not Paid	28-SEP-2006		13111-1		
8490-261	29-Aug-2006	Debit Memo	USD	<500.00>	<500.00>	Approved		Not Paid	28-SEP-2006		13073	8490	

3. When the search results display, click the invoice number link to view details of the invoice. (You can also view any associated purchase order(s), payments, or scheduled payments by clicking their links).

Invoice Details page



Standard Invoice: 2INV8122 (Total USD 980.00)

Currency=USD

Export

General

Invoice Date 05-Oct-2006
Status Approved
On Hold
Attachments None
Supplier Office Supplies, Inc.
Supplier Site OFFICESUPPLIES
Address 3605 Warrensville Center Road
Shaker Heights, OH 44122

Amount Summary

Item 980.00
Freight 0.00
Miscellaneous 0.00
Tax 0.00
Prepayment 0.00
Retainage 0.00
Withholding Tax 0.00
Total 980.00

Payment Information

Paid 0.00
Discount Taken 0.00
Due 980.00
Status Not Paid
Payment Date
Payment Term 30 Net (terms date + 30)

Invoice Lines | Scheduled Payments | Hold Reasons

Line	Type	Description	Qty	UOM	Price	Tax Included	Amount	Retainage	Status	PO Number	PO Line	PO Shipment	Buyer	Receipt
1	Item	20item1	10	EA	15.00		150.00	0.00	Approved	8122	1	1	Stock, Ms. Pat	8066
2	Item	20item2	10	DOZ	48.00		480.00	0.00	Approved	8122	2	1	Stock, Ms. Pat	8066
3	Item	20item3	10	LB	10.00		100.00	0.00	Approved	8122	3	1	Stock, Ms. Pat	8066
4	Item	20item4	10	LT	10.00		100.00	0.00	Approved	8122	4	1	Stock, Ms. Pat	8066
5	Item	20item5	10	DOZ	10.00		100.00	0.00	Approved	8122	5	1	Stock, Ms. Pat	8066
6	Item	20item6	10	GR	5.00		50.00	0.00	Approved	8122	6	1	Stock, Ms. Pat	8066

4. On the Invoice Details page, you can see the header level information.

5. To view invoice line information, click the Invoice Lines tab. You can also view any scheduled payments and any hold information.

Note: If you submitted your invoice online, there may be a delay before you can review it because the Accounts Payable department needs to process it first.

Viewing Payment Information

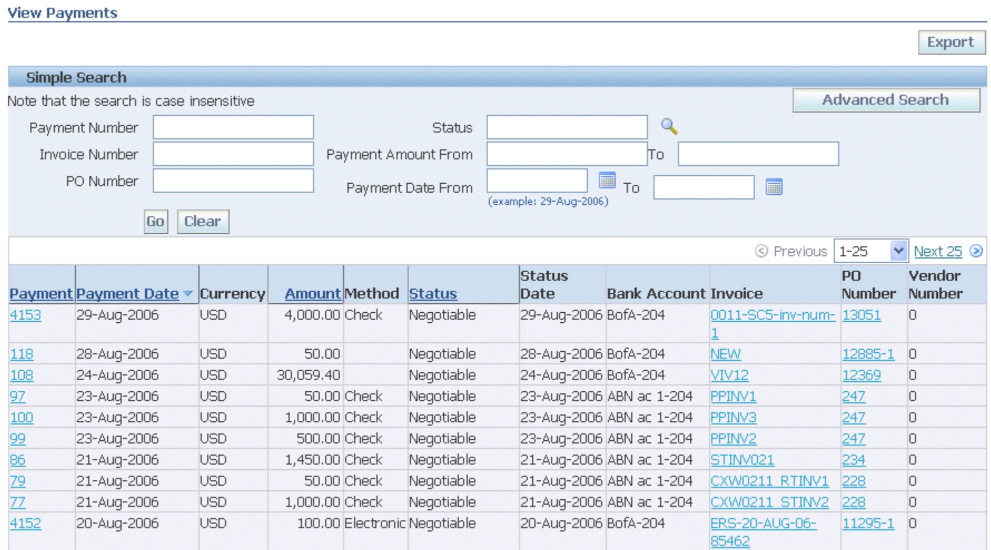
Payment inquiry enables you to view the history of all the payments to your invoices completed by the buying company. You can use the View Payments page to search using various search criteria, including:

- Payment number
- Invoice number
- Payment date
- Purchase order number

To view payment information:

1. On the iSupplier Portal Home page, click the Finance tab, then click the View Payments subtab.
2. On the View Payments page, enter search values into one or more of the search fields, and click Go. Or use the Advanced Search option.

Payment Summary Results Page


View Payments

Export

Simple Search

Note that the search is case insensitive

Advanced Search

Payment Number

Invoice Number

PO Number

Status

Payment Amount From To

Payment Date From To

(example: 29-Aug-2006)

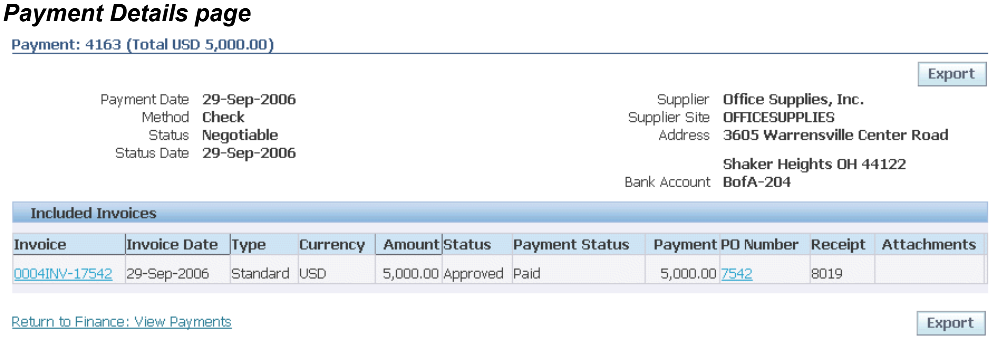
Go Clear

Previous 1-25 Next 25

Payment	Payment Date	Currency	Amount	Method	Status	Status Date	Bank Account	Invoice	PO Number	Vendor Number
4153	29-Aug-2006	USD	4,000.00	Check	Negotiable	29-Aug-2006	BofA-204	0011-SC5-inv-num-1	13051	0
118	28-Aug-2006	USD	50.00		Negotiable	28-Aug-2006	BofA-204	NEW	12885-1	0
108	24-Aug-2006	USD	30,059.40		Negotiable	24-Aug-2006	BofA-204	VIV12	12369	0
97	23-Aug-2006	USD	50.00	Check	Negotiable	23-Aug-2006	ABN ac 1-204	PPINV1	247	0
100	23-Aug-2006	USD	1,000.00	Check	Negotiable	23-Aug-2006	ABN ac 1-204	PPINV3	247	0
99	23-Aug-2006	USD	500.00	Check	Negotiable	23-Aug-2006	ABN ac 1-204	PPINV2	247	0
86	21-Aug-2006	USD	1,450.00	Check	Negotiable	21-Aug-2006	ABN ac 1-204	STINV021	234	0
79	21-Aug-2006	USD	50.00	Check	Negotiable	21-Aug-2006	ABN ac 1-204	CXW0211 RTINV1	228	0
77	21-Aug-2006	USD	1,000.00	Check	Negotiable	21-Aug-2006	ABN ac 1-204	CXW0211 STINV2	228	0
4152	20-Aug-2006	USD	100.00	Electronic	Negotiable	20-Aug-2006	BofA-204	ERS-20-AUG-06-85462	11295-1	0

3. When the search results display, click the payment number link to view details of the payment. (You can also view any associated purchase order(s), or invoices by clicking their links).

Payment Details page


Payment: 4163 (Total USD 5,000.00)

Export

Payment Date 29-Sep-2006
Method Check
Status Negotiable
Status Date 29-Sep-2006

Supplier Office Supplies, Inc.
Supplier Site OFFICESUPPLIES
Address 3605 Warrensville Center Road
Shaker Heights OH 44122
Bank Account BofA-204

Included Invoices

Invoice	Invoice Date	Type	Currency	Amount	Status	Payment Status	Payment	PO Number	Receipt	Attachments
0004INV-17542	29-Sep-2006	Standard	USD	5,000.00	Approved	Paid	5,000.00	7542	8019	

Return to Finance: View Payments

Export

4. On the Payments details page, you can see the payment details including the invoices addressed by the payment.

8

Supplier Profile Management

This chapter covers the following topics:

- Overview
- Supplier Supplier Profile Management flowProfile Management Flow
- General Company Information
- Company Profile
- Address Address bookBook
- Contact Contact directoryDirectory
- Business Business classificationsClassifications
- Products Products and servicesand Services
- Banking Details
- Creating Banking Details
- Responding to Buyer Surveys

Overview

Supplier Profile Management enables you to manage key profile details used to establish or maintain a business relationship with the buying company. This profile information includes address information, names of main contacts, user accounts (if you have the Supplier Profile and User Management responsibility), business classifications, banking details, and category information about the goods and services you are able to provide to the buyer. Buyer administrators will review the details you provide and use them to update the appropriate records in the buyer's purchasing transaction system.

You benefit from managing your profile yourself. Supplier Profile Management enables you to effectively represent yourself to the buying company and update your profiles details as necessary, making important information accurate.

This section includes the following sections:

Supplier Profile Management Flow

To have the information you enter in Supplier Profile Management processed in the system, log into the Oracle iSupplier Portal and access your profile. You can then enter information for your address book, contact directory, business classifications, products and services, or user accounts. The buyer administrator will review any changes to your profile and use this information to update their purchasing system.

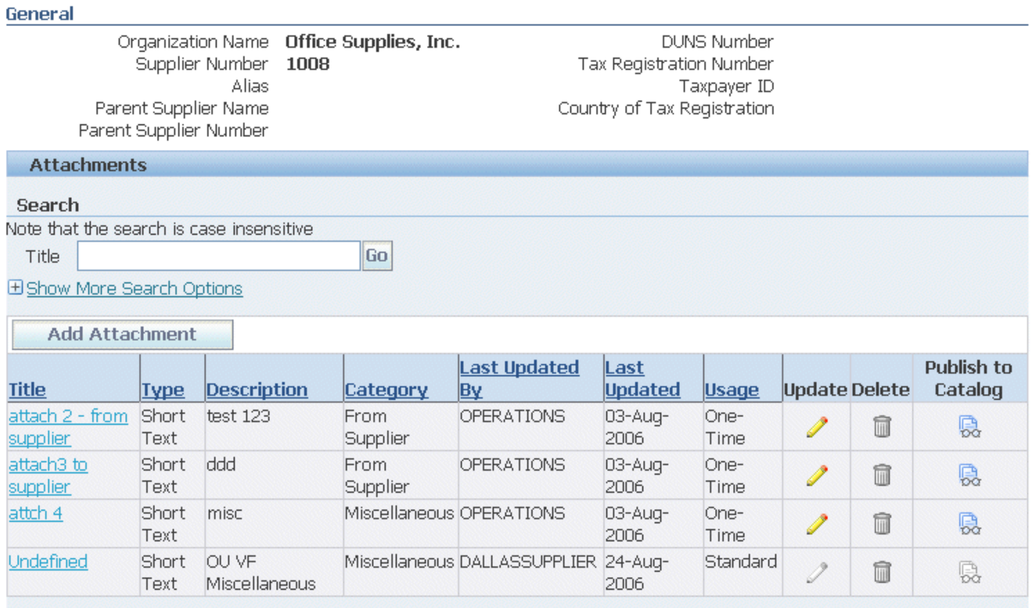
General Company Information

Management of your company's profile information involves the use of two high-level pages. The **General** information page provides a quick, high-level display of information at the company level. You can use the General information page to add an attachment to your profile. Adding attachments allows you to upload documents pertinent to your relationship with the buying company or upload documents that may have been specifically requested by the buying company (for example, tax documents).

The **Company Organization** page allows you to navigate to other pages where you can add or update your actual profile information.

To access the General page, on the iSupplier Portal **Home** page, click the Admin tab.

General Information page



General

Organization Name Office Supplies, Inc.
Supplier Number 1008
Alias
Parent Supplier Name
Parent Supplier Number
DUNS Number
Tax Registration Number
Taxpayer ID
Country of Tax Registration

Attachments

Search

Note that the search is case insensitive

Title Go

Show More Search Options

Add Attachment

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
attach 2 - from supplier	Short Text	test 123	From Supplier	OPERATIONS	03-Aug-2006	One-Time			
attach3 to supplier	Short Text	ddd	From Supplier	OPERATIONS	03-Aug-2006	One-Time			
attch 4	Short Text	misc	Miscellaneous	OPERATIONS	03-Aug-2006	One-Time			
Undefined	Short Text	OU VF Miscellaneous	Miscellaneous	DALLASSUPPLIER	24-Aug-2006	Standard			

To upload a local attachment:

1. Click Add Attachment.
2. To upload an attachment stored locally, accept the default Desktop File/Text/URL from the Add menu.
3. Give the attachment a title, description, and select a Category value to indicate its original source
4. Browse to the location of the attachment and select it.
5. Click Apply.

To upload an attachment from the buyer's document catalog:

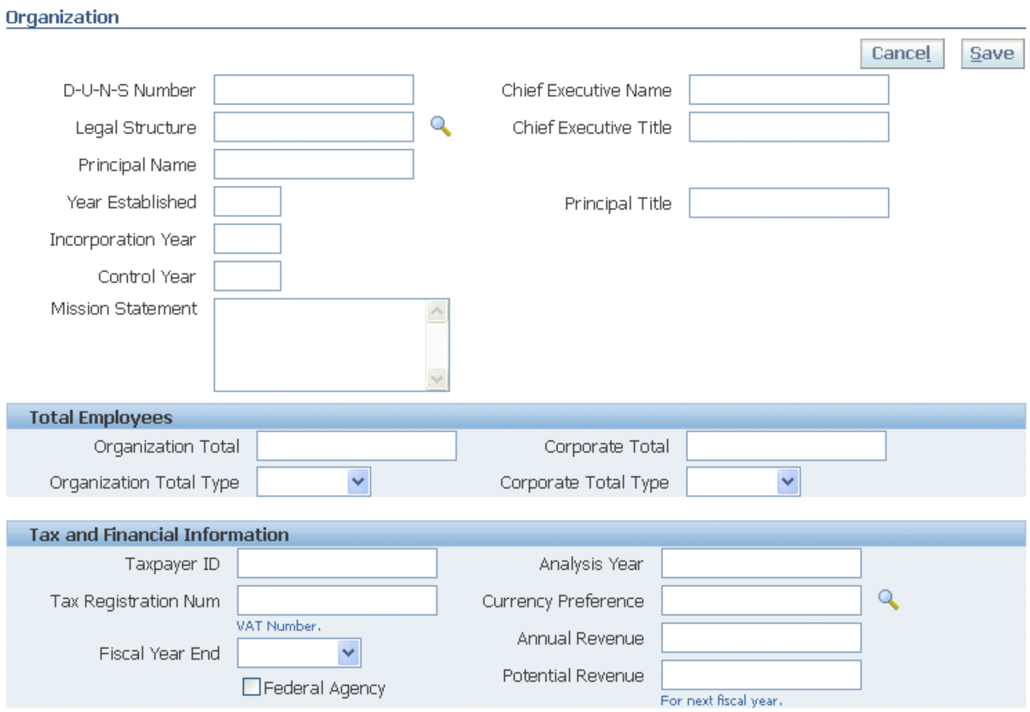
1. Click Add Attachment.
2. Select From Document Catalog from the Add menu.
3. Search on the document title, or expand the search options to use additional search fields.
4. Select the document(s), and click Apply.

Company Profile

Use the Company Profile pages to define the detailed information about your company. Use the navigation bar on the left to access the different pages of the Company Profile.

The **Organization** page defines high-level details about your company. To access the Organization page, click Organization in the Company Profile navigation tree.

Organization Page



Once you have entered appropriate information, click Save.

Address Book

Use the **Address Book** page to enter information on your company sites. You can create and modify the multiple addresses used in transactions with the buying company (for example, purchasing locations, payment sites, and addresses for RFQs). You can provide a comment for each address entry to describe how it is used. For example, you can enter an address record and indicate that this is an address for a location from which goods or services may be purchased.

After you enter address information, buyer administrators are notified of the changes. Buyer administrators must review the updates and decide how to use the details to update the purchasing system. Therefore, any changes you make may not be promoted to the system for a few days.

To manage address book details:

1. To access the Address Book page, click Address Book in the Company Profile navigation tree.

Address Book Page

Address Book

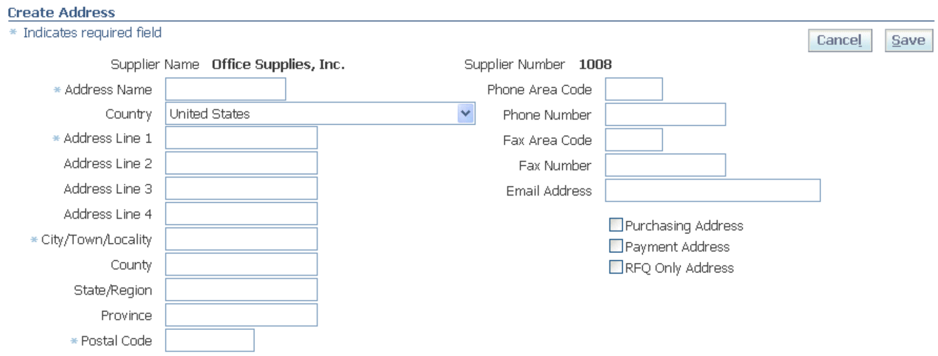
Create | Previous | 1-10 | Next 10

Address Name	Address Details	Country	Update	Remove
1ADEVTEST	1 main st Sunnyvale, CA 94065	United States		
42424242424	4242424242 San Francisco, CA	United States		
A211	A1 A2 A2 A2221	India		
ANTWERPEN	Jan Van Rijswijklaan 29 Antwerpen 2020	Belgium		
Addr1	Addr1 Addr1 Addr1 Addr1	India		
BURLINGTON	400 Dorset Streete Burlington, VT 05403	United States		
BURLINGTON	400 Dorset Street Burlington, VT 05403	United States		
CHICAGO	124 N. Canal Street Chicago, IL 60987	United States		
CLEVELAND	11000 Wintergreen Avenue Suite 4a Cleveland, OH 44106	United States		

2. The **Address Book** page displays the current addresses defined for your company. From this page you can

   - Delete an address by clicking the trash can icon.
   - Update an address by clicking the pencil icon.
   - Add a new address by clicking Create.

Create Address Page



1. On the Create Address page, enter the appropriate information for the new address (required fields are marked with an asterisk).

2. When finished, click Save.

Contact Directory

The Contact Directory lists the employees at your company who function as contacts between you and your buyer.

After entering the contact details, you can link the contacts to the appropriate address (described below). As people move within your organization, you can also revise the address details for a contact.

You can create multiple contacts and link each one to as many addresses as needed. Each contact must be unique based on first name, last name, and phone number. Contacts that are obsolete can be removed.

After you enter the information, buyer administrators are notified so they can review the details and use then to update their purchasing system. Therefore, your changes may not be promoted to the purchasing system for a few days.

Viewing contact information:

1. Click Contact Directory under the Company Profile navigation tree. The system displays your current list of contacts.

Contact Directory Details Page

Contact Directory

Create | Previous 1-15 Next 15

First Name	Last Name	Phone Number	Email	User Account	Remove	Addresses	Update
	452542525252		fgafafaf@fafaaf.com	✔			
Nilesh	Agrawal	345234		✔			
Nilesh	Agrawal						
Jai	Bala		JAISOORIA@YAHOO.COM	✔			
Jan	Dekker						
Jan	Dekker	6692189					
Jan	Dekker						
John	Gould	625539					
Gunnar	Hansson			✔			

2. On the **Contact Directory** page, you can
   - Delete a contact by clicking the trash can icon.
   - Update contact information by clicking the pencil icon.
   - Manage address information for a contact by clicking the Addresses icon.

   Address Associations for Contact Page

   Address Associations for Contact

   The addresses associated with the contact can be maintained in this page. Cancel Save

Address Name	Address Details	Remove
DÜSSELDORF	Rheinuferstraße 46, Düsseldorf, DE	

   Add Another Row

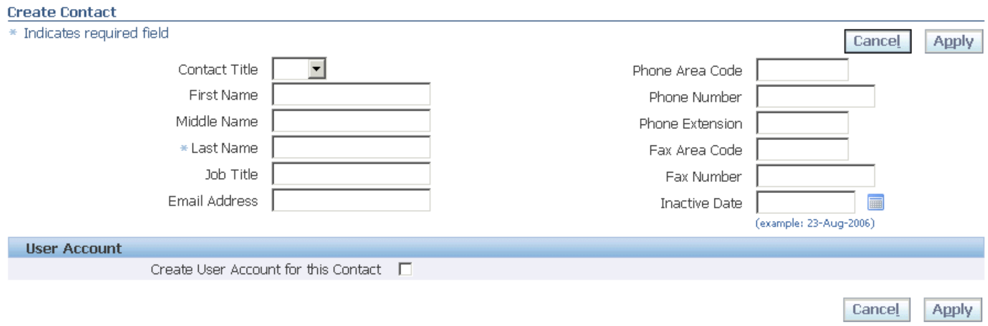
   Cancel Save

   Use the Address Associations for Contact page to manage the addresses for a particular contact:
   - To remove an address for a contact, click the trashcan icon.
   - To add an address to a contact, click Add Another Row, search for the address, and click Save.

To create a new contact

1. On the Contact Directory Details page, click Create.

Create Contact Page



2. Enter the appropriate information for the contact. To create a temporary contact, use the pop-up calendar to identify and expiration date.

3. If you have the authority to create user accounts, the Create User Account for This Contact checkbox appears on this page. Clicking this checkbox displays additional fields for creating and authorizing users with access to iSupplier Portal..

   To create a user account, grant the appropriate responsibilities and specify the appropriate user access restrictions to the new user. See the *Oracle iSupplier Portal Implementation* manual for details about defining user accounts.

4. Once you have specified your contact (and user account, if applicable) information, click Save.

Business Classifications

Buying companies establish a list of business classifications they want to use to classify their supply base. In some regions, these classifications are required by government regulations.

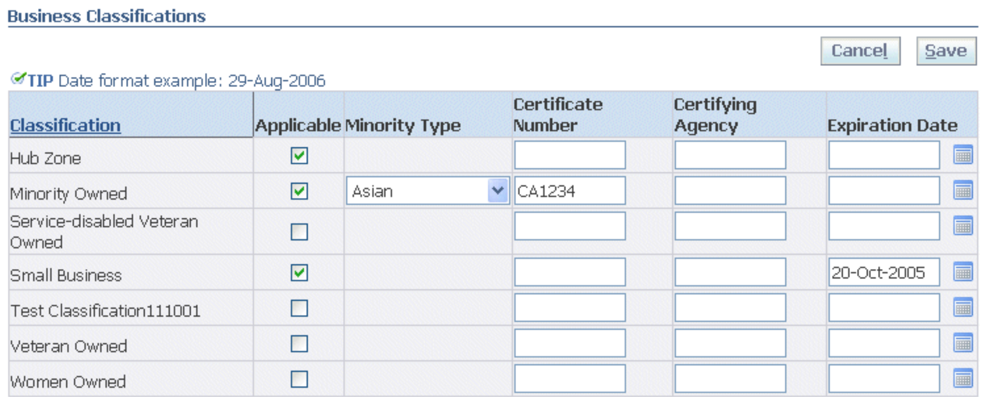
You can claim classifications that are appropriate to your business and add any required classification details. Buyers can then audit your qualifications. Once you claim the appropriate classifications, buyer administrators are notified so they can review the details.

To claim business classifications:

1. On the **General** information page, click Business Classifications.

2. On the **Business Classifications** page, check Applicable for all classifications that apply to your company.

Business Classifications page



3. Complete the remaining fields.

4. Click Save.

Products and Services

Buying companies define product and service category sets that they use to categorize their supply base. You can browse the list of goods and services and select all those that apply to your business. Buying companies can then use this information; some may use it to help generate supplier invitation lists for RFQs or for reporting.

You can browse the hierarchy tree and select a parent category or child categories. When a parent is selected, the buying company assumes that you can provide all the products or services in that category. After you select the product and services categories that apply to your business, buyer administrators are notified so they can review the details. You can update your selections at any time.

To claim products and services:

1. On the **General** information page, click Product and Services.

2. On the **Products and Services** page, the system displays the list of categories that have already been claimed by your company. (To browse child category details for any parent, click the view sub-category icon.)

3. Click Add.

4. On the **Add Products and Services** page, browse for a product or service and click Applicable. (Applicable is greyed out for any previously selected products or services are already selected as Applicable.)

   To view sub-category information about a product or service, click the view sub-categories icon. On the **Add Products and Services** page, click Applicable to apply a particular sub-category, and then click Apply.

5. Click Apply.

   To remove products or services:

6. On the **Products and Services** page, select a product or service.

7. Click Remove.

Banking Details

To simplify the process of capturing bank account related details and to improve data quality, you can create and maintain your own bank account details and assign these accounts to multiple addresses within your company. Buying companies can then access and approve these details for propagation into their payables systems.

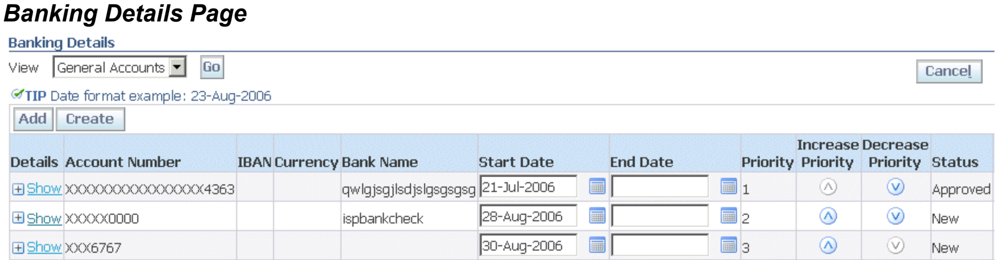
You can create and maintain bank account details that you want the buying company to use when they make payments to you. The system captures all relevant information. Since bank accounts are defined for a particular bank, branch and account number, you have the ability to enter all this information when creating your account entries. When you enter your account information, the system validates for duplicate entries.

Creating Banking Details

To view existing bank accounts:

1. From the Company Profile navigation tree, click Banking Details. The **Banking Details** page displays information on any bank accounts already defined for your company. Use the View menu entries to control which bank accounts are displayed.

Banking Details Page



- General Accounts displays accounts that are used company-wide (as opposed to accounts assigned to a particular address).

- All Accounts displays general accounts as well as accounts assigned to an address. Use this view to update account information.

- All Assignments displays which accounts are assigned to which sites.

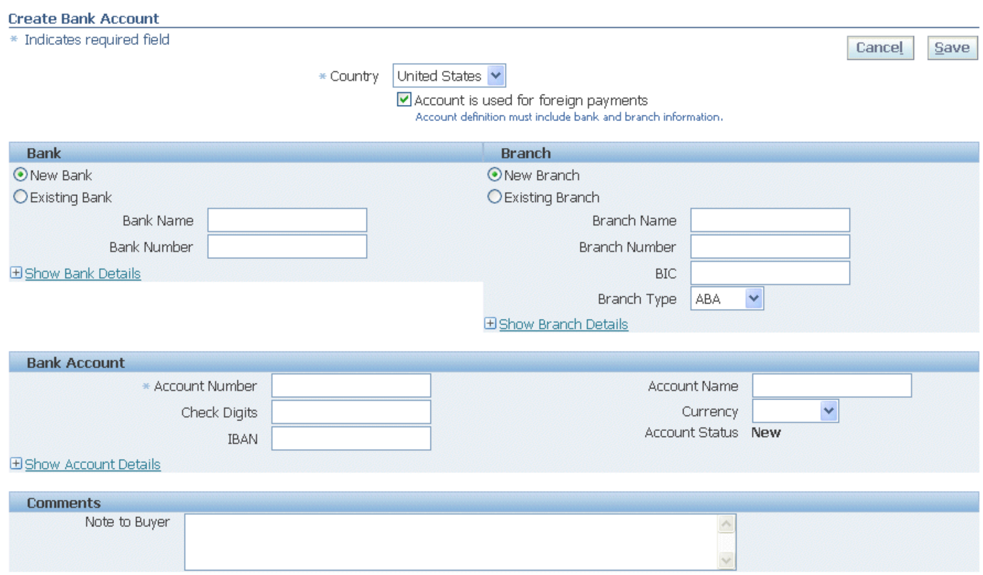
2. To add an additional existing account to the list of general accounts, click Add, select the account, and click Save.

To create a new account:

1. On the Banking Details page, click Create.

2. On the Create Bank Account page, enter the appropriate values. Note that you can expand the Bank, Branch, and Bank Account sections to enter additional details.

Create Bank Accounts Page



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. Provide any additional account details by clicking "Show Account Details."

5. When you have finished entering bank account details, click Save.

Responding to Buyer Surveys

From time to time, buyers may request you respond to surveys. Surveys are used by the buying organizations to solicit information and input for use in improving relationships with suppliers.

To respond to a buyer survey:

1. From the iSupplier Portal **Home** page, click the Admin tab.

2. On the General page, click Surveys in the navigation tree on the left.

3. All surveys appropriate for you are listed in the table. To respond to a survey, click the pencil icon. The instructions on completing surveys vary from one to another.

9

Buying Company View

This chapter covers the following topics:

- Buying Company View
- Using the Oracle iSupplier Portal Home Oracle iSupplier Portal Home pagePage with the Buying Company View
- Order Information
- Purchase Orders
- Agreements
- Purchase History
- Acknowledging Changes
- Shipment Information
- Shipment Notices
- Receipts
- Account Information
- Invoices
- Payments

Buying Company View

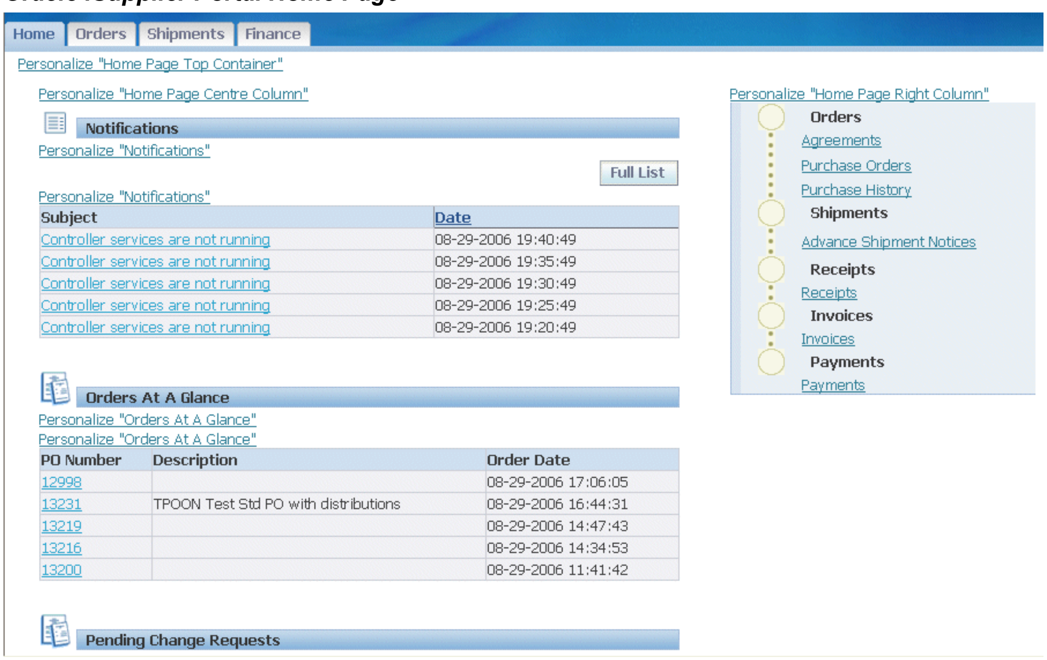
The buying company view provides the same easy to use view of procure-to-pay transactions as the supplier view. Using the Internal User View responsibility in Oracle iSupplier Portal, your buying company can view order, shipment, receipt, invoice, and payment information. They can also search for information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

This section includes information for buying companies using Oracle iSupplier Portal, and includes the following:

Using the Oracle iSupplier Portal Home Page with the Buying Company View

When you access the Oracle iSupplier Portal application using the Internal User View responsibility, the **Oracle iSupplier Portal** home page displays.

Oracle iSupplier Portal Home Page



This page provides the following information:

Global buttons

The following buttons display on the home page and all Oracle iSupplier Portal pages:

Home - Returns you to the main portal where you can select another responsibility or application

Logout

Preferences - Displays the **Preferences** page

HelpPersonalize Page - If this button appears, you may choose personalization context for your system.

Tabs

Oracle iSupplier Portal provides tabs for easy navigation. For example, if you want to view of a purchase order, start by clicking the Orders tab, and then click an order type in the task bar directly below the tabs.

Quick Links

This section displays direct links to various functionality in the Oracle iSupplier Portal application. Click any link to go directly to the corresponding page.

Notifications

To view notifications, click the linked subject. Notifications are messages that you may respond to. For example, a supplier may have submitted a change request and is waiting for you to respond to (accept) it.

Orders at a Glance

To view your most recent orders, click a purchase order number.

Pending Change Requests

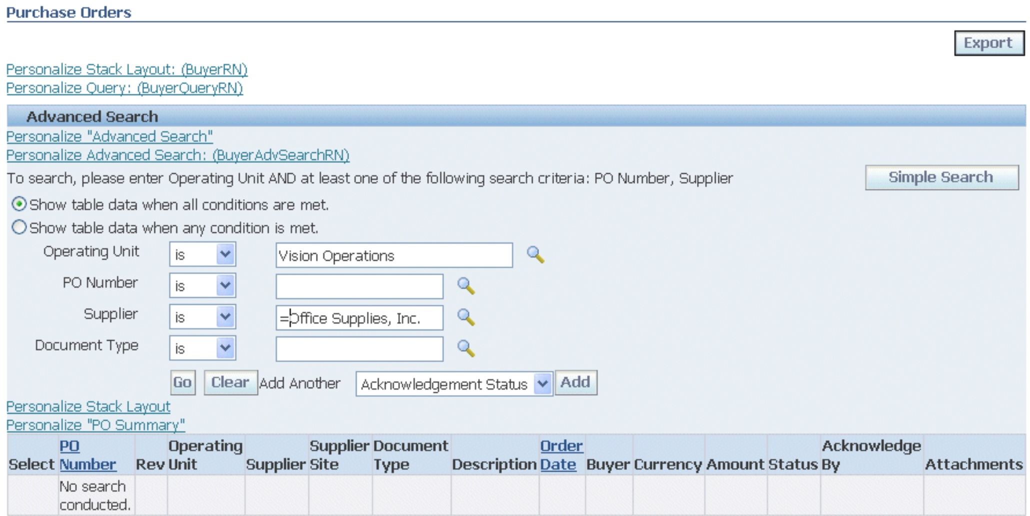
To respond to supplier change requests, click a purchase order number.

Order Information

Purchase Orders

The **Purchase Orders** page enables you to view and search for purchase orders.

Purchase Orders Page



Some examples of fields for you to enter search criteria include:

- Operating Unit
- PO Number
- Order Date
- Supplier
- Supplier Site
- Buyer

You must enter a minimum search criteria to display search results. Minimum search criteria for purchase orders include operating unit and PO number or supplier.

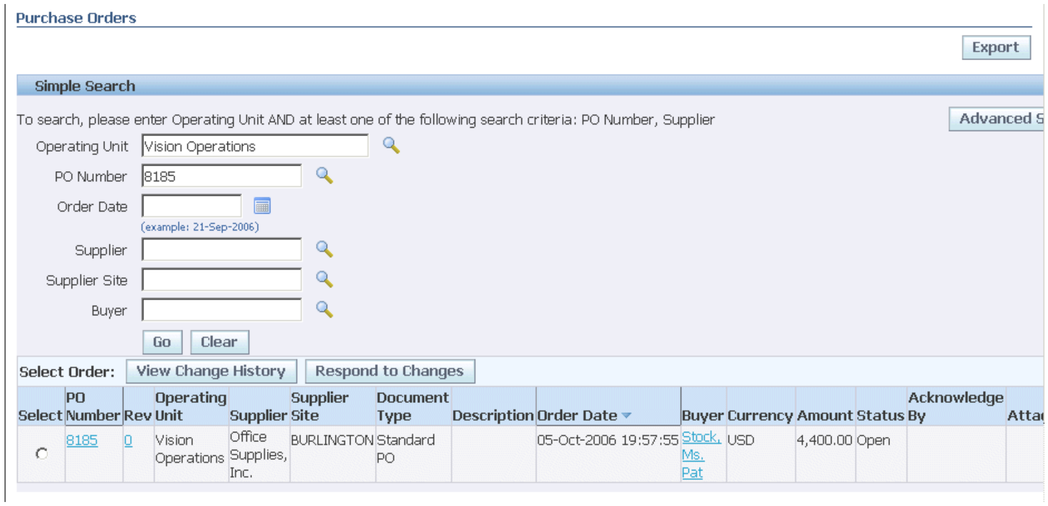
Using advanced search, you can build and narrow searches with the available search operators. Search operators enable you to specify the matching conditions for a search. Available search operators include:

- is - Use this operator for an exact match.

After you have entered you search criteria, click Go.

Once your search criteria is displayed, you may view details of purchase orders in the purchase orders list.

Purchase Order Search Results page



If you would like to export data regarding purchase orders, click Export.

To view the details of a purchase order, click the purchase order number link.

Purchase Order Details page

The **View Order Details** displays the details of the purchase order. Use the Actions menu options to view further details for the purchase order. Note also that you can create a work confirmation for this purchase order by selecting Create Work Confirmation from the Actions menu.

Agreements

The **Supplier Agreements** page enables you to view and search for supplier agreement details.

You may search for details on supplier agreements using the following search criteria:

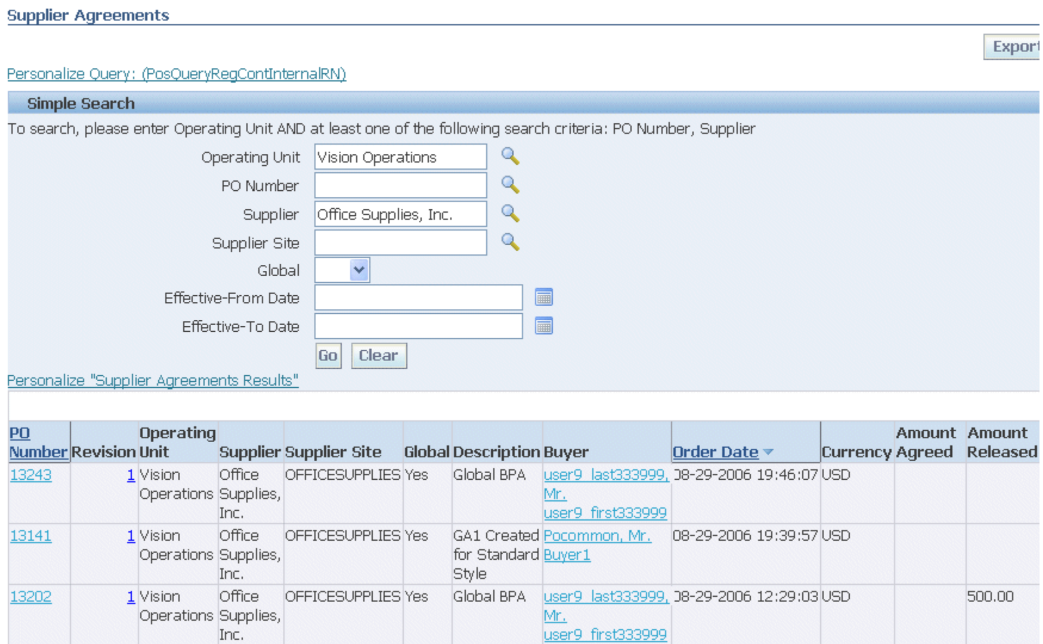
- Operating Unit
- PO Number
- Supplier
- Supplier Site
- Global
- Effective From Date
- Effective To Date
- Status

You must enter a minimum search criteria to display search results. Minimum search criteria for agreements include operating unit and PO number or supplier.

You may view details of supplier agreements in the search results list.

If you would like to export data regarding supplier agreements, click Export.

Supplier Agreements Page



Purchase History

The **Purchase Order Revision History** page enables you to view and search for purchase history details.

You may search for details on purchase order revision histories using the following search criteria:

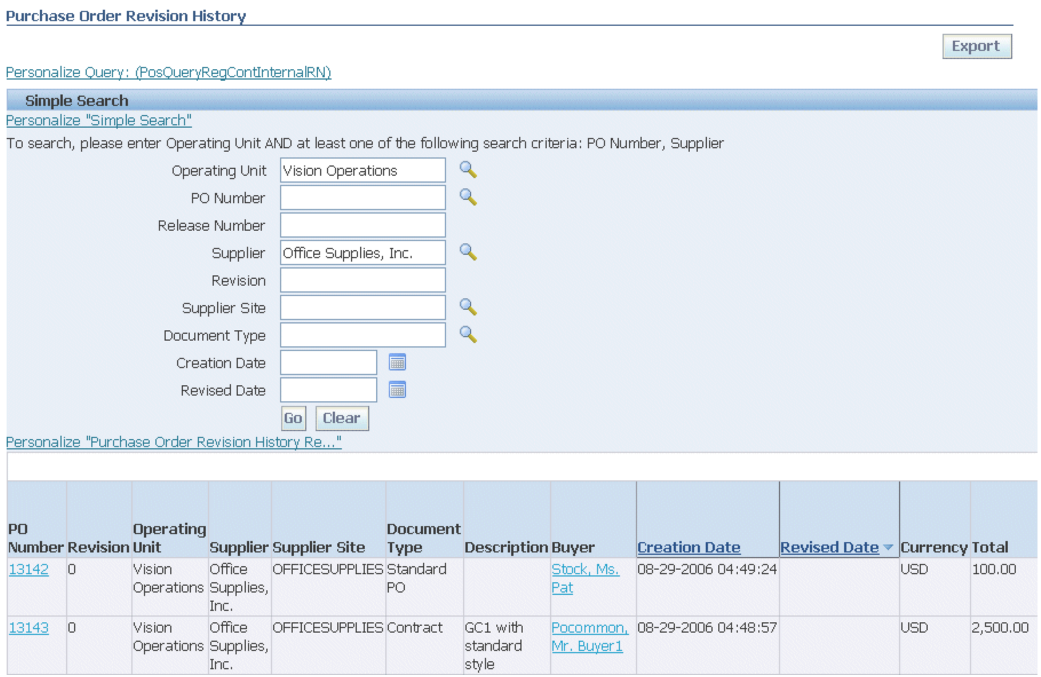
- Business Unit
- PO Number
- Release Number
- Supplier
- Revision
- Supplier Site
- Document Type
- Creation Date
- Revised Date

You must enter a minimum search criteria to display search results. Minimum search criteria for purchase history includes business unit and PO number or supplier.

You may view details of purchase order revision histories in the search results list.

If you would like to export data regarding purchase order revision histories, click Export.

Purchase Order Revision History Page



Acknowledging Changes

Over the lifecycle of a purchase order, the supplier may communicate changes to values on the purchase order. These changes could be changes to the purchase order values themselves. If the purchase order represents a complex work project, the supplies may need to bill you at interim points during the life of the contract. In these cases, the supplier will create a work confirmation to notify you that a certain milestone has been reached, or a certain completion percentage has been performed. In either case, you need to acknowledge the change.

To acknowledge purchase order change requests:

The **Change Requests** page enables you to view purchase orders with outstanding change requests as well as purchase orders which have been rejected by suppliers. .

To view a list of purchase orders which suppliers have rejected, select Supplier Acknowledgement Rejections from the View menu and click Go.

To respond to supplier change requests:

1. From the iSupplier Portal Home page, click the Orders tab, and then click the Pending Changes subtab.

2. Select Change Requests Pending Response from the View menu and click Go.

3. Select the purchase order whose changes you wish to approve/reject, and click Respond to Changes.

Respond to Changes Page

4. On the **Respond to Supplier Changes** page, the values for the purchase order lines that have been changed by the supplier are displayed in the PO Details section. For any value that has changed, you can see the previous value and the new value, flagged with a green star.

5. To accept all the changes, click Accept All. To reject all changes, click Reject All.

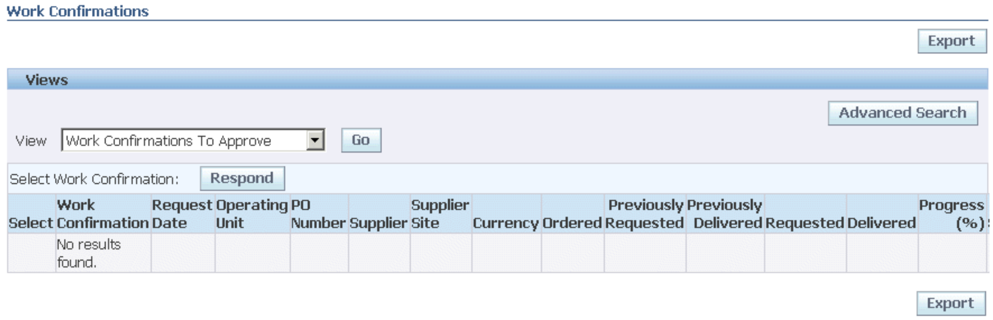
6. Otherwise, for any changes you wish to address, select Accept or Reject from the Response menu. You can also enter text documentation in the Reason column. When finished, click Submit.

7. You will receive confirmation that your response to changes has been submitted.

To acknowledge a work confirmation:

1. On the Orders tab, click the Work Confirmations subtab.

Work Confirmation Summary page



2. On the Work Confirmations page, select Work Confirmations to Approve from the View menu and click Go.

3. Select the work confirmation you wish to view and click Respond.

4. The work confirmation may include one or more pay items for approval. Select the appropriate action from the Response menu. You can enter a note to the supplier (if you reject a pay item, a reason is required).

5. When finished replying to the pay items on the work confirmation, click Submit.

Shipment Information

Shipment Notices

On the **View Advance Shipment Notices** page, you may search for details on advance shipment notices using the following search criteria:

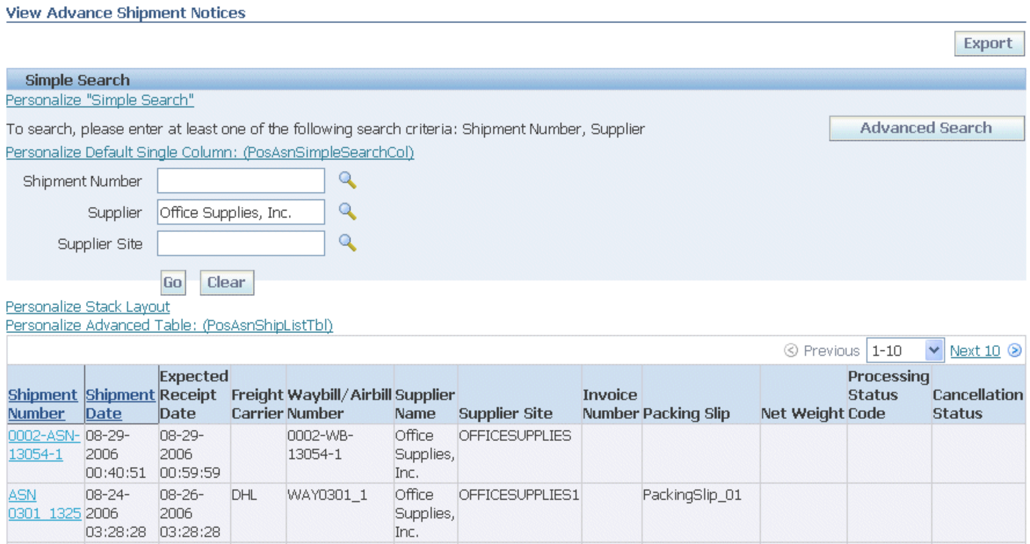
- Shipment Number
- Supplier
- Supplier Site

You must enter a minimum search criteria to display search results. Minimum search criteria for shipment notices include shipment number or supplier.

You may view details of shipment notices in the search results list.

If you would like to export data regarding shipment notices, click Export.

View Advance Shipment Notices Page



Receipts

On the **Receipt Transactions** page, you may search for details on receipt transactions using the following search criteria:

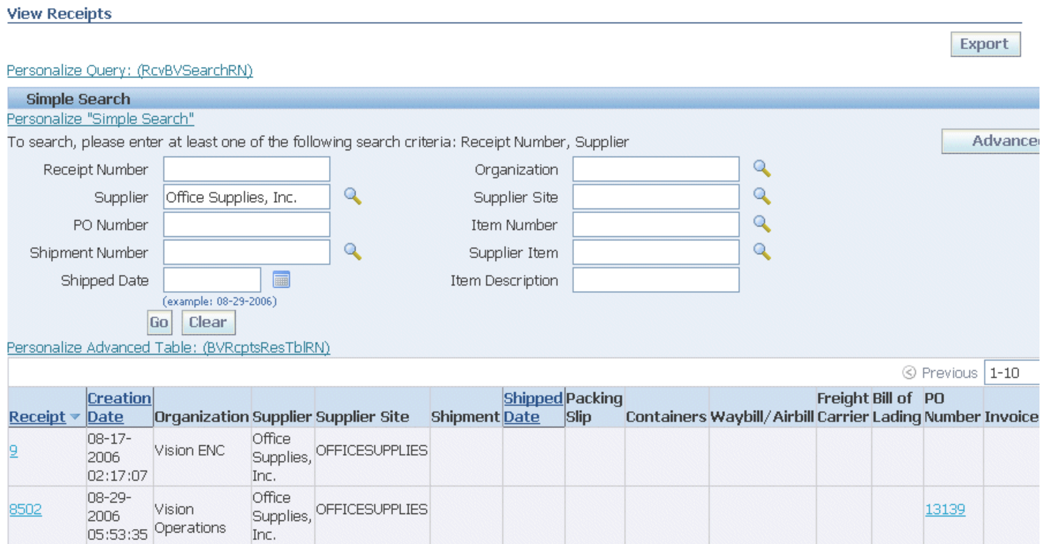
- Organization
- Supplier
- Supplier Site
- Receipt Number
- Receipt Date
- PO Number
- Item
- Supplier Item
- Receipt Location

You must enter a minimum search criteria to display search results. Minimum search criteria for receipts include receipt or supplier.

You may view details of receipt transactions in the search results list.

If you would like to export data regarding receipt transactions, click Export.

Receipt Transactions Page



Account Information

Invoices

On the **View Invoices** page, you may search for details on invoices using the following search criteria:

- Invoice
- Supplier
- Supplier Site
- Invoice Date
- PO Number
- Payment
- Packing Slip
- Payment Status
- Operating Unit
- Gross Amount

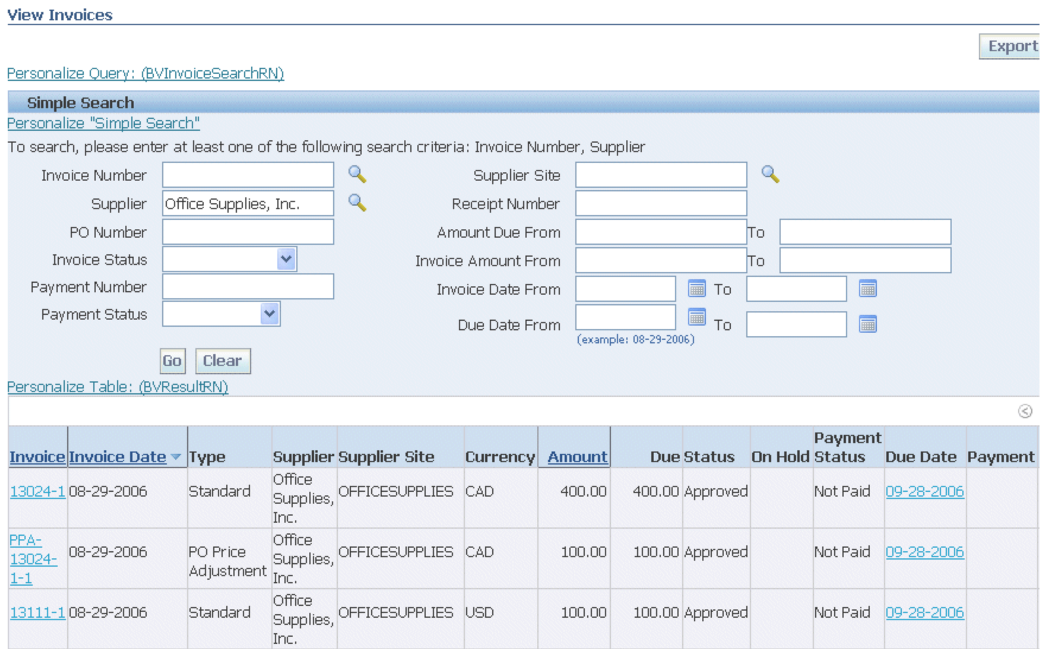
- Invoice Date
- Amount Due
- Due Date

You must enter a minimum search criteria to display search results. Minimum search criteria for invoices include invoice number or supplier.

You may view details of invoices in the search results list.

If you would like to export data regarding invoices, click Export.

View Invoices Page



Payments

On the **View Payments** page, you may search for payment summaries using the following search criteria:

- Payment
- Supplier
- Supplier Site
- Payment Date

- PO Number
- Packing Slip
- Operating Unit
- Payment Amount
- Payment Date

You must enter a minimum search criteria to display search results. Minimum search criteria for payments include payment number or supplier.

You may view payment details in the search results list.

If you would like to export data regarding payments, click Export.

View Payments Page