Agile Product Lifecycle Management for Process

Supplier Portal User Guide

Release 6.0.0.6

Part No. E29773-01

June 2012

ORACLE

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Agile Product Lifecycle Management for Process, Release 6.0.0.6

E29773-01

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June 2012

Document Control

Change Record

Date	Author	Version	Change Reference
Sept-07	Agile/Oracle	1.0	Initial release, Part No. TPPR-0035-5.1A
Feb-08	Oracle	2.0	Second release, Part No. E11008-01
Sept-09	Oracle	3.0	Third release, Part No. E12392-01
Feb-10	Oracle	4.0	Fourth release, Part No. E12392-01
Sept-10	Oracle	5.0	Fifth release, Part No. E18535-01
Aug-11	Oracle	6.0	Sixth release, Part No. E24918-01
Dec-11	Oracle	7.0	Seventh release, Part No. E26489-01
Feb-12	Oracle	8.0	Eighth release, Part No. E26489-02
June-12	Oracle	9.0	Ninth release, Part No. E29773-01

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About This Manual

Agile Product Lifecycle Management for Process Documentation

The Agile Product Lifecycle Management (PLM) for Process documentation set includes Adobe® Acrobat™ PDF files. The Oracle Technology Network (OTN) Web site: http://www.oracle.com/technetwork/documentation/agile-085940.html contains the latest versions of the Agile PLM for Process PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Agile PLM for Process Documentation folder available on your network from which you can access the Agile PLM for Process documentation (PDF) files.

Note To read the PDF files, you must use the free Adobe Reader™ version 7.0 or later. This program can be downloaded from the Adobe Web site: http://www.adobe.com/.

If you need additional assistance or information, please go to http://metalink.oracle.com or phone 1.800.233.1711 for assistance.

Before calling Oracle Support about a problem with an Agile PLM for Process manual, please have the full part number, which is located on the title page.

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Audience

This guide is intended for end users who are responsible for creating and managing information in Agile Product Lifecycle Management for Process. Information about administering the system resides in the *Agile Product Lifecycle Management for Process Administrator User Guide.*

Variability of Installations

Descriptions and illustrations of the Agile PLM for Process user interface included in this manual may not match your installation. The user interface of Agile PLM for Process applications and the features included can vary greatly depending on such variables as:

- Which applications your organization has purchased and installed
- Configuration settings that may turn features off or on
- Customization specific to your organization
- Security settings as they apply to the system and your user account

Where to Find Information

Consult the table below to find specific information from the relevant Agile PLM for Process information source.

Table 1: Agile PLM for Process documentation topics, by source

Information type	Supplier Portal User Guide	Admin. User Guide	Release Notes	Agile training	Help Desk	Agile sales rep
Administering Agile PLM for Process		●		●		
Approved registrations	●					
Cache management		●				
Core data management		●				
Custom data management		●				
Deactivated registrations	●					
Feature requests					●	●
Group management		●				
Installing Agile PLM for Process				●		●
Known issues			●			
Last-minute changes			●			
Managing registrations	●					
Rejected registrations	●					
Resolved issues			●			
System-based roles		●				
Technical support					●	
Using the Supplier Portal application	●					

Document Conventions

The following formatting elements appear in Agile PLM for Process documentation.

Element	Meaning
Helvetica Condensed, 9 pt. bold type	A user interface (UI) element that a procedure is instructing you to click, select, or type into. For example, buttons or text entry fields.
`9 pt. monospace font`	Code samples
`10 pt. monospace font`	File names or directory names
Blue italic font	The linked portion of a cross-reference. Click it to go to the referenced heading, table, or figure.
Minion Typeface, Title Case	A named UI element that a procedure is describing but not instructing you to click, select, or type into.
Note Minion 11.5 pt, with faint blue bar over & under	Alerts you to supplemental information.
Caution! Minion 11.5 pt, with faint red bar over & under	Alerts you to possible data loss, breaches of security, or other more serious problems.
Important Minion 11.5 pt, with thick red bar over & under	Alerts you to supplementary information that is essential to the completion of a task.

CHAPTER 1

Introduction

This chapter presents an overview of Supplier Portal and Supplier Portal Administration. Topics in this chapter include:

- *Supplier Portal Overview*
- *Supplier Portal Administration Overview*
- *Touch Points with Other Applications*

Supplier Portal Overview

Supplier Portal (SP) provides a central location for your company's supply chain partners to access specification data, review catalogs of procedural and standards documents, and manage contact information.

Refer to *Using Supplier Portal* on page 2-1 for more information on a supplier's use of Supplier Portal.

Supplier Portal Administration Overview

Administrators use the Supplier Portal Administration (SPA) application to manage Supplier Portal registrations.

Refer to *Using Supplier Portal Administration* on page 3-1 for more information on an administrator's use of Supplier Portal Administration.

For general information on using Agile Product Lifecycle Management for Process software, see the *Agile Product Lifecycle Management for Process Getting Started Guide.*

Touch Points with Other Applications

Supplier Portal and Supplier Portal Administration interface with several other Agile PLM for Process applications.

Global Specification Management

Suppliers can view specifications created in the Global Specification Management (GSM) application using Supplier Portal. Refer to *Viewing Specifications* on page 2-10 and *Supplier Actions* on page 2-14, or for more information, see the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.

Supply Chain Relationship Management

Suppliers can view sourcing approvals, documents, and contacts for select companies and facilities using Supplier Portal. Sourcing approvals and contacts for companies and facilities are set up and maintained using the Supply Chain Relationship Management (SCRM) application. Refer to page 2-18 through page 2-26 for more information, or see the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide*.

Administrators control what information registrants see in Supplier Portal by assigning companies and facilities, which are set up in SCRM. Refer to *Assigning Companies or Facilities to a Supplier Portal User* on page 3-3 for more information.

Document Reference Library

Using Supplier Portal, suppliers can view documents and catalogs of documents stored in the Document Reference Library (DRL) application for their associated companies and facilities. Refer to *Viewing Document Reference Library* on page 2-19 for more information, or see the *Agile Product Lifecycle Management for Process Document Reference Library User Guide*.

eQuestionnaire

Suppliers can initiate questionnaires from Supplier Portal. Refer to the *Agile Product Lifecycle Management for Process eQuestionnaire User Guide* for more information on the eQuestionnaire (eQ) application.

CHAPTER 2

Using Supplier Portal

This chapter describes how a company and its suppliers use Supplier Portal. It includes the following topics:

- *Overview of Supplier Portal*
- *Accessing Supplier Portal—Registrants*
- *Viewing Specifications*
- *Publishing Specifications*
- *Access Control and Visibility*
- *Supplier Actions*
- *Viewing Supplier and Facility Documents*
- *Viewing Document Reference Library*
- *Displaying Your Company and Facility Contacts to a Supplier*
- *Managing Supplier Contact Information*

Overview of Supplier Portal

Supplier Portal provides a central location for your company's supply chain partners to access specification data, review catalogs of procedural and standards documents, and manage contact information. It gives supply chain partners (such as vendors, suppliers, brokers, and distributors) the ability to:

- Obtain information regarding specifications that they have a sourcing relationship with
- Obtain guidance surrounding expectations of deliverables in the form of catalogs of documents from a managed library
- Manage contact data for personnel at their facilities
- View selected documentation related to suppliers' facilities, compliance, contracts, and specifications
- Approve or reject a specification
- Initiate questionnaires for specifications

Using Global Specification Management (GSM) and Supply Chain Relationship Management (SCRM), you can set restrictions that control the information that is visible to your suppliers.

This guide explains the use of:

- Supplier Portal (SP) from a *supplier perspective* in terms of functionality and information available. These topics are covered in this chapter, as well as a supplier requesting and receiving access to the Supplier Portal Web site.
- Supplier Portal Administrator (SPA) from a *company perspective* (granting access to Supplier Portal to a supplier). See *Using Supplier Portal Administration* on page 3-1 for this information.

Supported Specification Types

Supplier Portal supports the following specification types:

- Ingredient
- Product
- Printed packaging
- Packaging material
- Trade
- Equipment

Accessing Supplier Portal—Registrants

Note This chapter is written for a company's suppliers who register for and use Supplier Portal.

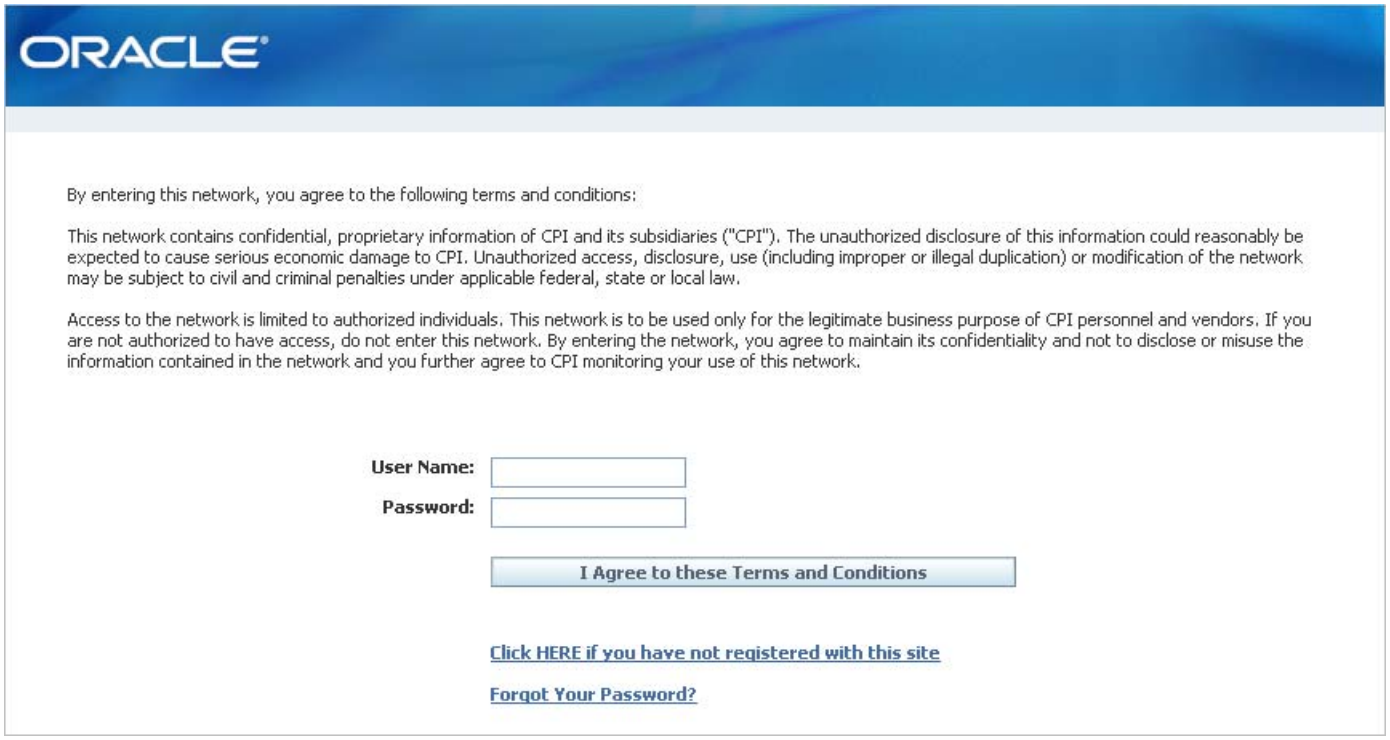
When the supplier accesses the Supplier Portal site, the Welcome page is displayed, as shown in figure 2-1.

Figure 2-1: Welcome page



The supplier clicks on the language of preference. If the supplier selects **English**, the Login page will be displayed, as shown in figure 2-2.

Figure 2-2: Login page

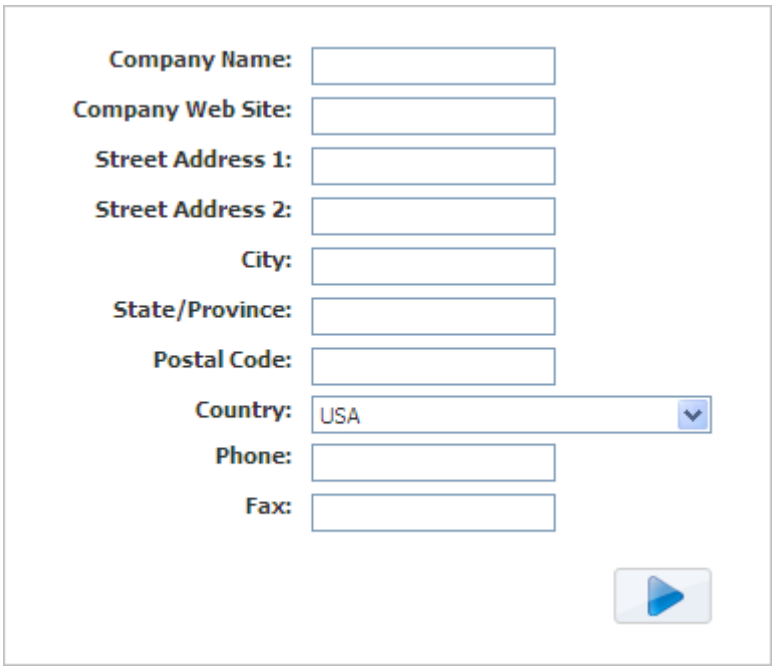


The supplier logs in using a user name and password. Or, if the supplier has not yet registered, the supplier clicks the **Click HERE if you have not registered with this site** link.

Note The user name is defined by the system based on the supplier's first and last name provided during the registration process. It is emailed to the user once approval has been granted. The user name can be changed by the Supplier Portal Administrator.

Clicking the **Click HERE if you have not registered with this site** displays the first step in the registration process, the Company Information page, shown in figure 2-3.

Figure 2-3: Company Information page

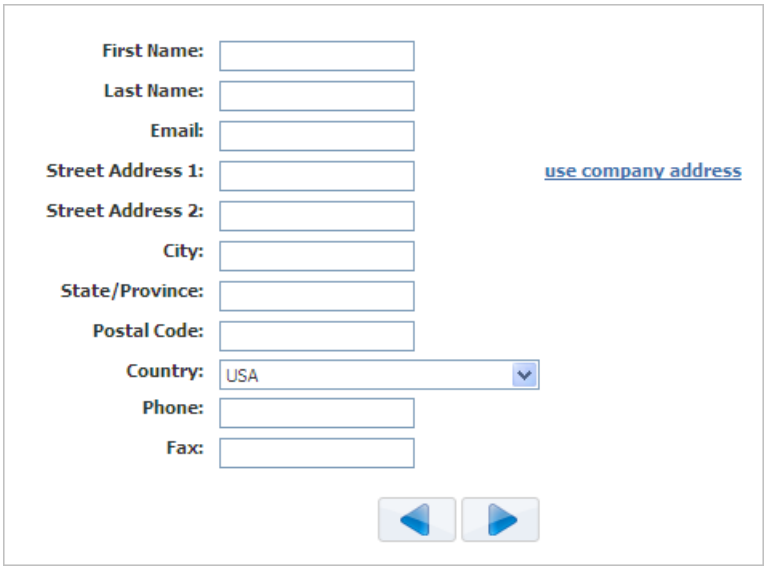


This is the first page where a supplier fills out company information. The following fields are required:

- Company Name
- Company Web Site
- Street Address 1
- City
- State/Province
- Postal Code
- Country
- Phone
- Fax

The supplier fills in the company information and clicks the next page icon ( ). The Contact Information page is displayed, as figure 2-4 shows below:

Figure 2-4: Contact Information page

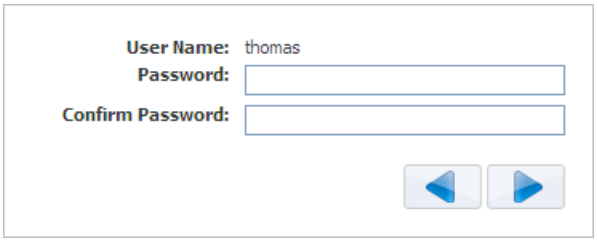


This is the second registration page where a supplier provides contact information. The following fields are required:

- First Name
- Last Name
- Email
- Street Address 1
- City
- State/Province
- Postal Code
- Country
- Phone
- Fax

The supplier fills in the fields and clicks the next page icon ( ) to go forward, or clicks the previous page icon ( ) to update information on prior pages. The supplier can click the **use company address** link and the system will populate the address fields from the previous page. Clicking the next page icon ( ) displays the Username & Password page, shown in figure 2-5 below.

Figure 2-5: Username & Password page

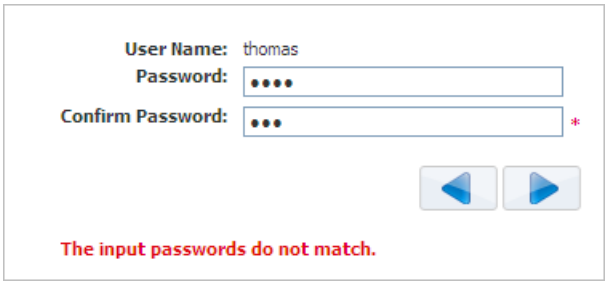


This is the third page of the registration process. The User Name field displays the system defined user name. The supplier enters a password in the **Password** field, and confirms it by typing it again in the **Confirm Password** field.

If the passwords do not match, an error message is displayed as shown in figure 2-6 below.

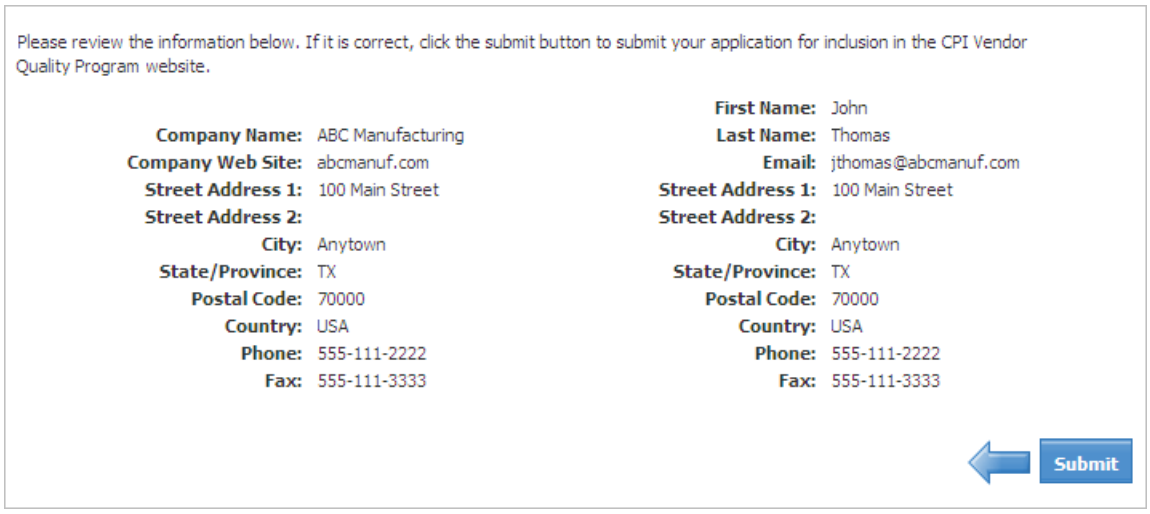
Once a valid user name and password is entered, the supplier can click the previous page icon ( ) to update information on prior pages, or move forward by clicking the next page icon ( ).

Figure 2-6: Error message



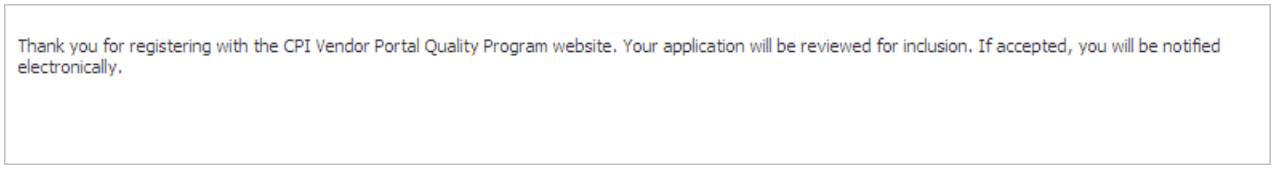
The Registration Summary page, shown in figure 2-7, is the final place for the supplier to review the information provided before submitting the registration request.

Figure 2-7: Registration Summary page



When the supplier clicks **Submit**, the request is sent to the Supplier Portal Administration (SPA) application. The Thank You confirmation page, shown in figure 2-8 below, is displayed. The Thank You page confirms that the request has been successfully sent. The supplier now waits for approval from the Supplier Portal administrator.

Figure 2-8: Thank You page



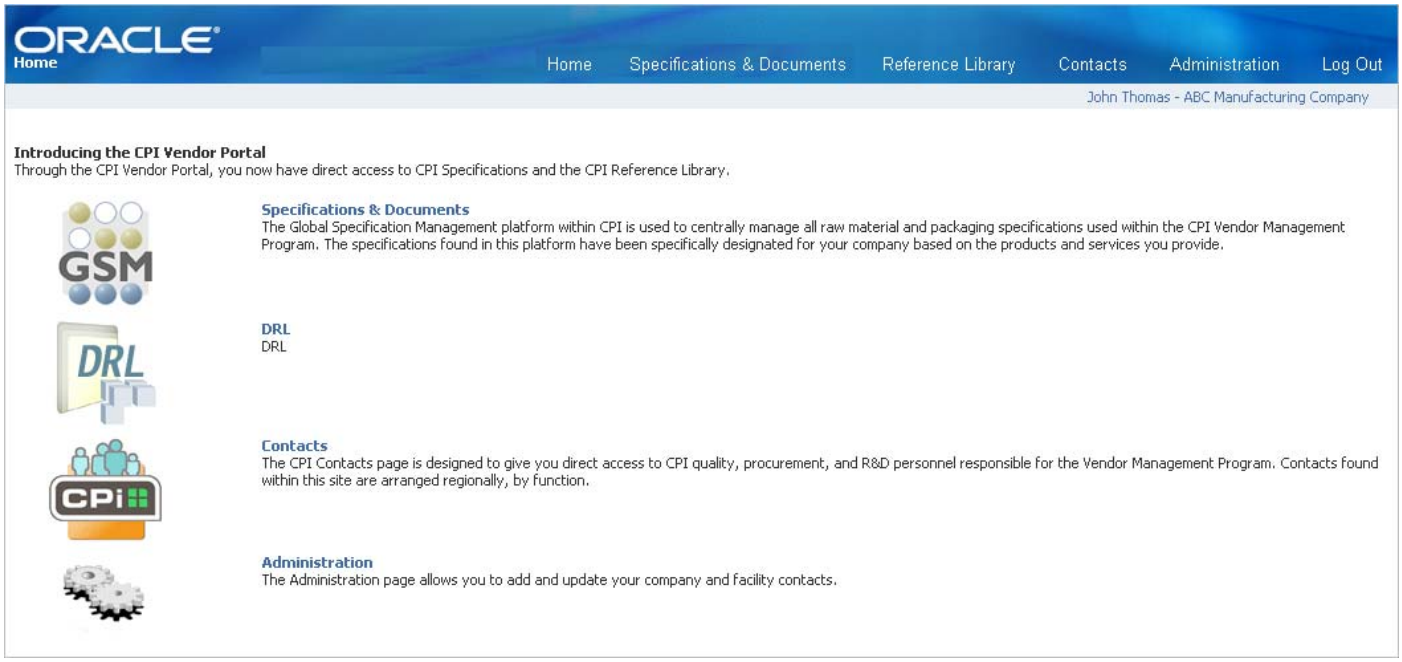
The administrator accesses Supplier Portal Administration (SPA) and views the registration request. The administrator can either grant or deny the request from the supplier. When the administrator approves the request from the supplier, the supplier will receive an email confirming that the request has been granted. The administrator will also associate the appropriate companies and facilities to the supplier, as this will determine the specification and contact information the supplier will see in Supplier Portal. Refer to *Using Supplier Portal Administration* on page 3-1 for more information.

When the administrator grants the request from the supplier, the supplier will be sent an email confirming that the request has been granted.

Once logged into Supplier Portal, the supplier will be able to view those specifications for which they have sourcing approvals. Several criteria are used to decide which specifications will be visible to the supplier. These are described in more detail later in this chapter.

On logging in, the supplier will see the page shown in figure 2-9. This is the Home page of Supplier Portal.

Figure 2-9: Home page



The supplier can perform the following tasks using Supplier Portal:

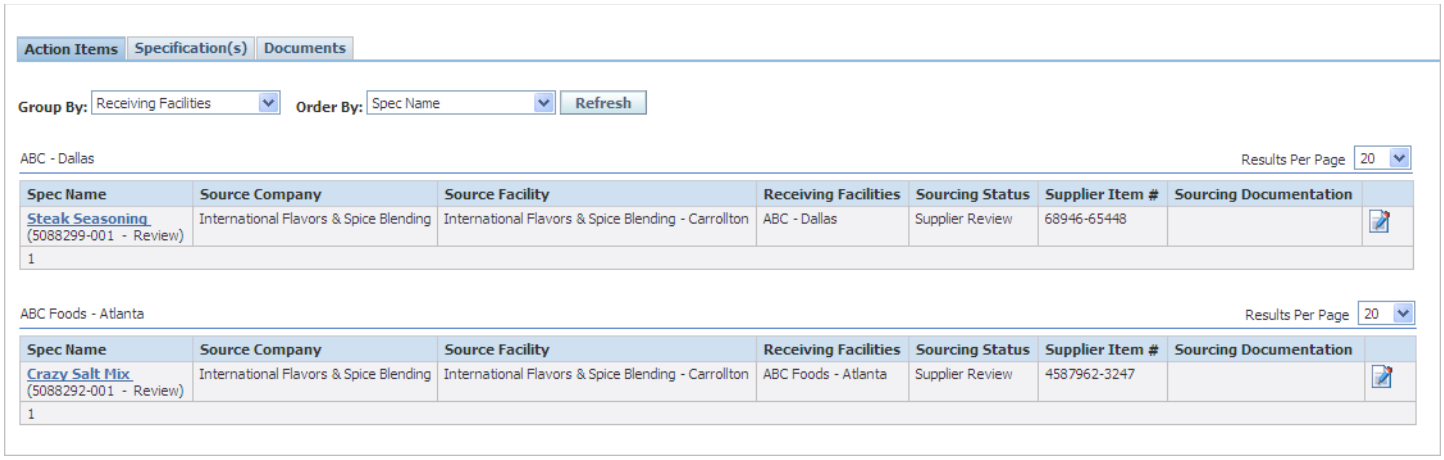
- View raw material specifications such as ingredient, product, printed packaging, packaging material, trade, and equipment specifications
- View public documents attached to these specifications
- View related specifications
- View sourcing approvals
- View public documents attached to the sourcing approvals
- Approve specifications by sending an electronic signature
- Submit changes to specifications by creating and sending a supplier-initiated questionnaire
- View selected documents in the Document Reference Library (DRL)
- View selected documents attached to the supplier
- View selected documents attached to facilities
- Manage contact information for companies and facilities that the supplier has been associated with

You can log out of Supplier Portal by clicking **Log Out** in the navigation bar. Supplier Portal displays the login page with a message verifying a successful logout.

Viewing Specifications

The supplier can view specification-related information by clicking **Specifications & Documents** from the Home page. The Action Items page only displays if the supplier has action items. This page contains specifications awaiting approval from the supplier, as figure 2-10 shows below. The Action Items page only displays specifications that contain the "Supplier Review" tag in their WFA template's step.

Figure 2-10: Action Items tab



The listing displays the name of the specification in addition to sourcing approval information.

The Action Items and Specifications tabs include two drop-down lists used to categorize the specification listing. By default, specifications are sorted by receiving facility and then ordered by specification name inside each facility grid.

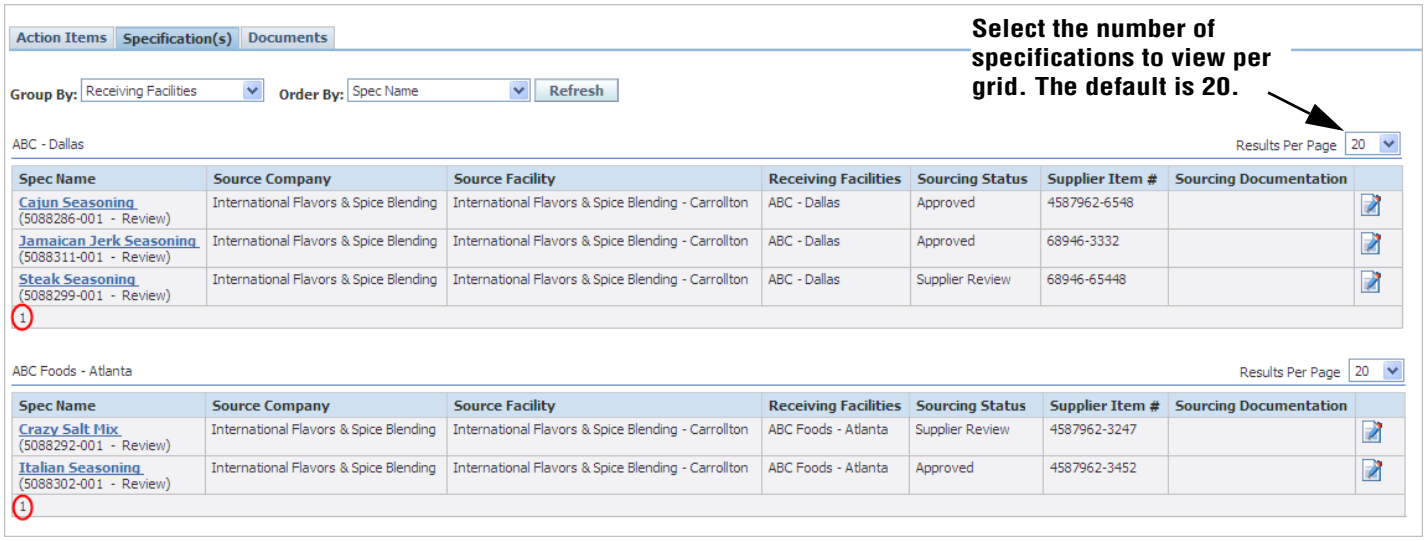
1 **Group By**—Select a choice to group the specifications by:
   - Source Company
   - Source Facility
   - Receiving Facilities
   - Sourcing Approval Status
   - -- No grouping (The supplier would select this to only use the Order By option)

2 **Order By**—Select a choice to order the specifications by:
   - Spec Name
   - Source Company
   - Source Facility
   - Sourcing Approval Status
   - Supplier Item #

The supplier clicks the **Refresh** button after making selections from the drop-down lists. Each group is paged. Select the Results Per Page drop-down to control how many specifications are listed in each grid. The default value is 20.

Select the numbers in the footer of the grid to see the next page of specifications. See figure 2-11 below.

Figure 2-11: Specification(s) tab



Each specification is listed with the following key information:

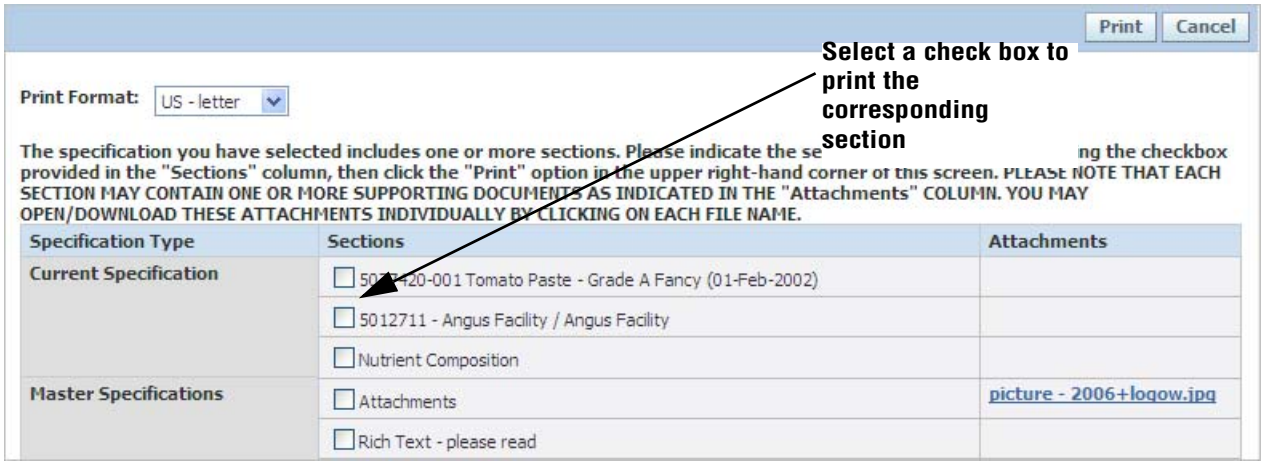
- **Spec Name**—The specification name
- **Source Company**—The company sourcing this specification
- **Source Facility**—The facility sourcing this specification
- **Receiving Facilities**—The facilities that receive this specification
- **Sourcing Approval Status**—The status of the sourcing approval (draft, approved, etc.)
- **Supplier Item #**—The unique material ID assigned by the supplier. The Supplier Item # is found on the sourcing approval.
- **Sourcing Documentation**—The field displays attachments associated with a sourcing approval. It does not include sourcing approval supplier documents.

Publishing Specifications

Printing and Viewing a Specification

The supplier can print a specification. From the Action Items tab or the Specifications tab, the supplier clicks on the Spec Name link to view details about the specification in the Print dialog box, as figure 2-12 shows below.

Figure 2-12: Print dialog box



Information printed from this dialog box reflects the data as it currently exists in GSM. The supplier can decide to print the details of the specification or details about related specifications. In the figure above, the primary specification has several related specifications.

The supplier can also print the shared documents and the associated sourcing approval attached to the specification. Only the sourcing approval that is tied to the supplier registrant will be accessible. The sourcing approval print includes:

- Company Name
- Sourcing Type
- Protocol ID
- Cross References grid
- Sourcing Facility Name
- Supplier Item #
- Class
- All Custom Data (Extended Attributes and Custom Sections)
- Receiving Facilities grid
- Supplier Signed Info
- Notes
- Sourcing Approval Status

Note Attachments and SDM will not be included in print out.

The supplier selects one of the following options from the Print Format drop-down list:

US - letter—Standard U.S. 8x11 inch paper (default)

Europe - A4—Standard international A4 sized paper

Once the supplier has made selections, clicking **Print** generates a document with the selected information from the Print dialog box. The supplier can then print the file as needed.

Access Control and Visibility

The visibility and access control of information in the Supplier Portal is managed at several levels.

Controlling Access

As described earlier in this chapter, a registrant must have an approved user name and a password to access Supplier Portal. In addition, the registrant can only see information about companies or facilities that he or she has been associated with by the Supplier Portal administrator. The registrant can not access information related to other partners and suppliers.

Controlling Visibility

Users working in Global Specification Management (GSM) and Supply Chain Relationship Management (SCRM) have the ability to control the information that the approved registrant can view in Supplier Portal. For GSM specifications to be visible to the supplier, the following criteria have to be met:

- The GSM specification must be in a workflow step on which the System Action is set to "Publish to Supplier" and
- The sourcing approval for that specification must be in a workflow step on which the System Action is set to "Publish to Supplier"

If either of the two conditions is not true, the specification will not be visible on the Supplier Portal.

For more information on workflow steps, refer to the *Agile Product Lifecycle Management for Process Administrator User Guide.*

The following objects' visibility can be controlled through tags set in GSM:

- Attachments
- %Breakdowns
- Shelf Life
- Custom Sections
- Extended Attributes

See the *Agile Product Lifecycle Management for Process Global Specification Management User Guide* for more details.

Note The ingredient specification's substitutes grid is not available to the supplier.

Supplier company contacts and facility contacts will be visible in Supplier Portal only if the **Publish to Supplier Portal** field is selected in SCRM. Documents attached to supplier company and facility will be visible in Supplier Portal only if the **Publish to Supplier Portal** field is selected in SCRM. See the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide* for more details.

Notifying the Supplier

The supplier can be notified when the specification is published to the Supplier Portal. When the tag of "Send Notification to Sourcing Supplier" is added to the sourcing approval's WFA step, an email will be sent to the supplier when the sourcing approval transitions. See the WFA chapter of the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information.

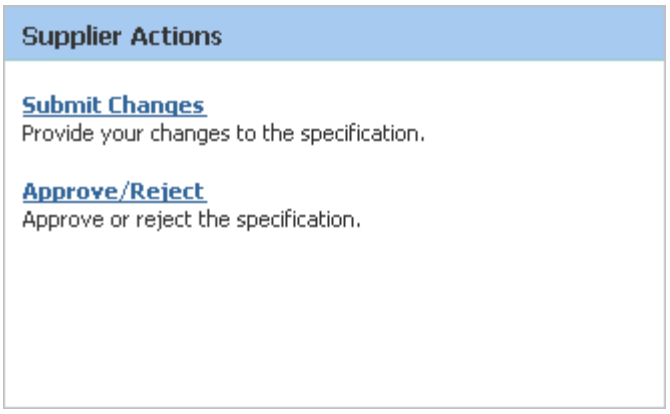
Supplier Actions

Suppliers can use Supplier Portal to approve specifications and initiate changes to a specification.

Approving Specifications

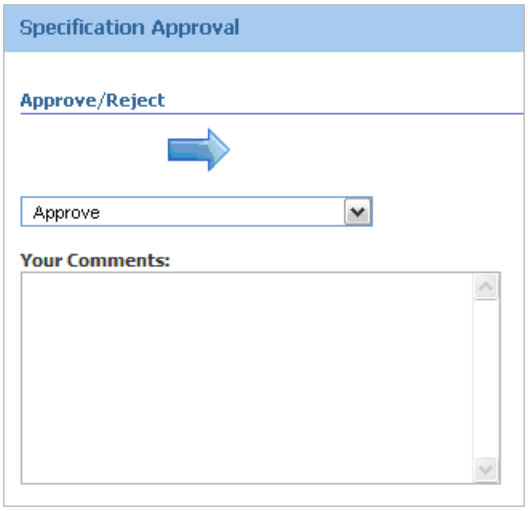
Suppliers can view the specification by clicking the hyperlinked Spec Name field, as described in *Printing and Viewing a Specification* on page 2-11. Suppliers can take action on a specification, providing an electronic signature, by clicking the supplier actions icon (). The Suppliers Action dialog box displays, as figure 2-13 shows below.

Figure 2-13: Supplier Actions dialog box



Suppliers can approve or reject a specification by selecting the **Approve/Reject** link. When the Approve/Reject link is selected, the Supplier Actions dialog box closes and the Specification Approval dialog box displays, as figure 2-14 shows below.

Figure 2-14: Specification Approval dialog box



The supplier enters any comments related to the approval or rejection of the specification in the **Your Comments** field (required), and then chooses from the options in the drop-down field. These options may vary based on your configuration. A simple example would be the following options:

Approve—Approves the specification

Reject—Rejects the specification

Note The name of these options are based on the WFA template step names that contain the tags 'supplier approved' and 'supplier rejected.' Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information.

The supplier clicks the move step forward icon ( ) to submit the approval or rejection. The specification no longer appears in the Action Items list. Based on the supplier action, the associated sourcing approval will be advanced in its workflow to the specified approved/rejected status. The supplier's comments and action will be captured on the sourcing approval's audit trail tab. If the supplier approved the specification, the sourcing approval's Supplier Signed Spec field will be checked and dated, and comments will be captured.

Sourcing Approval Owner Notification

When the supplier submits accept/reject, the owners of the sourcing approval will be notified by email informing them of the supplier's actions. (If the owner is a group then all users of that group will be emailed.) The email is configurable and includes the following variables:

- <Approver First Name>
- <Approver Last Name>
- <Approved/Rejected Action>
- <specification Number>
- <specification version number>
- <Specification Name>
- <cross reference system name-equivalent number>
- <Date Stamp>
- < Time Stamp>
- <approver comments>

Note Emails are not sent until a workflow transition occurs.

Sample Email

Table 2-1 below shows a sample email.

Table 2-1: Sample email sent to owner of specification

SUBJECT: <Approved/Disapproved Action>: <Specification Name>(<specification Number>-<specification version number>, <cross reference system name-equivalent number>) MESSAGE: <Approver Supplier First Name><Approver Last Name> <Approved/Disapproved> the specification <Specification Name>(<specification Number>-<specification version number>, <cross reference system name-equivalent number>) on <Date Stamp> at <Time Stamp>. They included the following comments: <comments> Sample: DISAPPROVED: Chicken Nuggets (50001232-001, SAP - 1254516-02341, ORC - 00034503.) John Supplier rejected the specification Chicken Nuggets (50001232-001, SAP - 1254516-02341, ORC - 00034503.) an May 5, 2008 at 3:42pm. They included the following comments: The peanut allergen is missing from the specification.

Access Control and Visibility

For the supplier to provide an electronic signature, the following conditions must be met:

- The sourcing approval must be in a status with the "Supplier Review" tag. The sourcing approval workflow template must contain the appropriate supplier approved and supplier rejected tagged statuses.
- Registrants receiving the email that the specification is ready for review must have a valid email address.
- The specification and sourcing approval status must contain the "Publish to Supplier Portal" tag.

For more information on workflow templates, refer to the "Using WFA to Manage SCRM Workflows" chapter in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Initiating a Questionnaire for a Specification

From the Action Items and/or Specifications tab(s), the supplier can initiate a questionnaire for the associated specification. The supplier clicks on the supplier action icon ( ). In the Supplier Actions dialog box, shown in figure 2-13, on page 2-14, the supplier clicks on **Submit Changes**.

When the Submit Changes button is selected, a new questionnaire is created, and the eQuestionnaire Welcome page is displayed. The supplier can now login to eQ and fill out the questionnaire. For more information, refer to the *Agile Product Lifecycle Management for Process eQuestionnaire User Guide*. At the same time, an email is sent to the supplier who initiated the questionnaire. This content of this email is configurable. This email contains a link to the questionnaire just created.

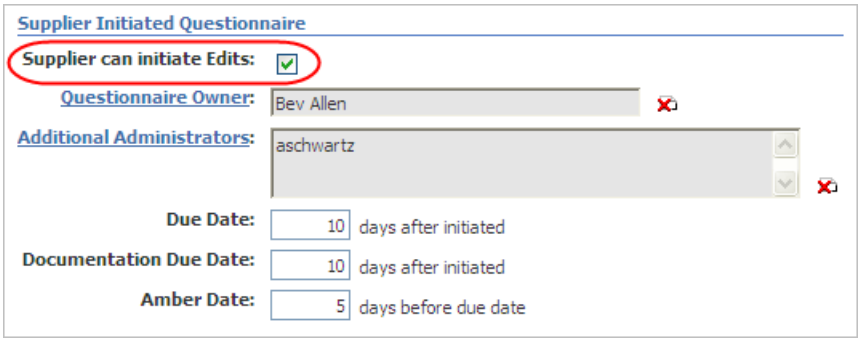
For more information, on questionnaires, refer to the *Agile Product Lifecycle Management for Process eQuestionnaire User Guide*. Refer to the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide* for more information on sourcing approvals.

Access Control and Visibility

For the supplier to initiate a questionnaire, the following conditions must be met:

- The eQuestionnaire (eQ) application is installed.
- Supplier-initiated questionnaires must be configured on.
- The specification and sourcing approval status must contain the "Publish to Supplier Portal" tag.
- An eQ template needs to be created for each specification type.
- The "Supplier can initiate Edits" field is checked on the sourcing approval, as figure 2-15 shows below.

Figure 2-15: SCRM, sourcing approval



Refer to the *Agile Product Lifecycle Management for Process eQuestionnaire User Guide* for more information.

Viewing Supplier and Facility Documents

The Documents tab lists all the shared supplier documents and attachments that are included on company and facility profiles. Documents must be marked as "Publish to Supplier Portal" in SCRM to be displayed.

Figure 2-16 below shows documents attached to the supplier company and facilities.

Figure 2-16: Specifications & Documents page, Documents tab

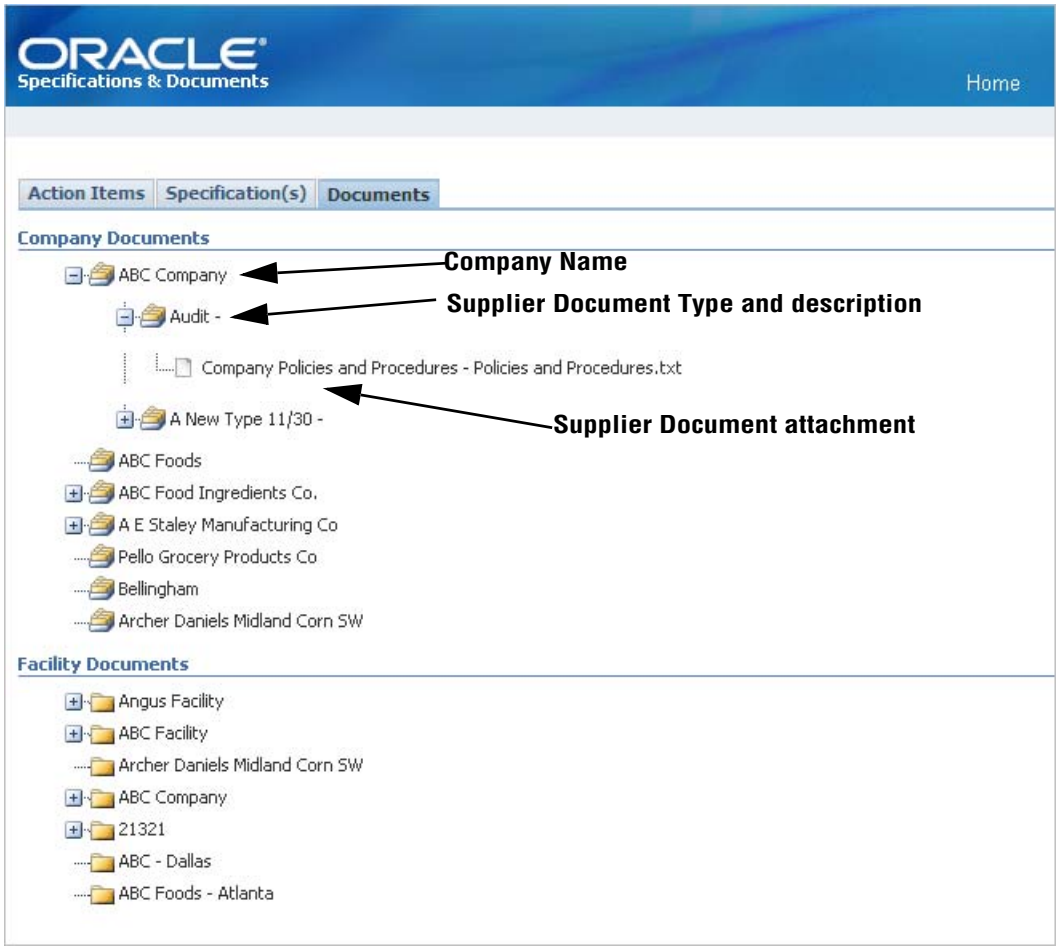


Figure 2-16 above shows the hierarchy of how the documents are stored. The Supplier Document Type feature works much like a folder in that it holds related files in one spot. You can click the expand node icon (⊞) to expand the listing, or "open" the folder. Files can be attached independently to a company or facility (as attachments) or can be included in a supplier document. The dashed lines show where the documents are attached. Click any linked file name to open the file.

Viewing Document Reference Library

This page shows Document Reference Library (DRL) catalogs and documents available to the supplier. This visibility is set up in SCRM under the DRL Catalog tab on the company profile. The catalogs and documents are set up in DRL. The supplier has access to documents attached in DRL if:

- The document belongs to a document catalog that is associated with the supplier's company, and
- The document is marked "Publish to Supplier Portal" in the DRL application

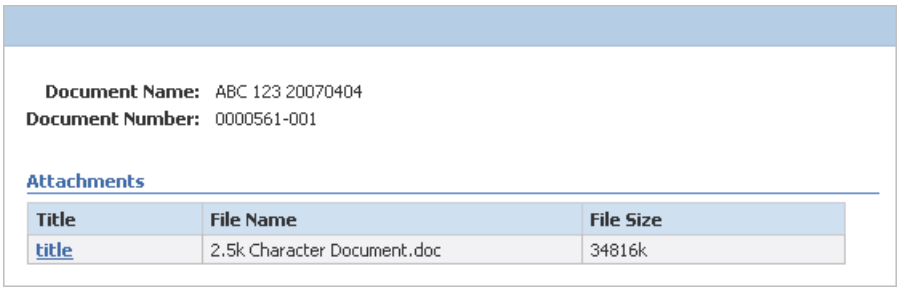
The supplier can view the DRL catalogs and the documents in the catalog by clicking the **Reference Library** link. Figure 2-17 below displays the Reference Library page.

Figure 2-17: Reference Library page



A DRL document can have one or more files called attachments. Clicking the DRL document name will display the DRL document's identifying information and all of its attachments, as shown in figure 2-18 below.

Figure 2-18: DRL document detail



The supplier can click on an individual attachment to view or print it.

Refer to the *Agile Product Lifecycle Management for Process Document Reference Library User Guide* for more details on DRL. Refer to the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide* for more details on SCRM.

Displaying Your Company and Facility Contacts to a Supplier

Clicking the **Contacts** link from the Home page displays the Contacts page shown in figure 2-19 below. This page displays all facilities tied to a business unit.

Note The Contact link displays on the Home page only if it is configured on. For more information on this feature, refer to the `BUFacilitySearchPattern` configuration key described in the *Agile Product Lifecycle Management for Process Configuration Guide*.

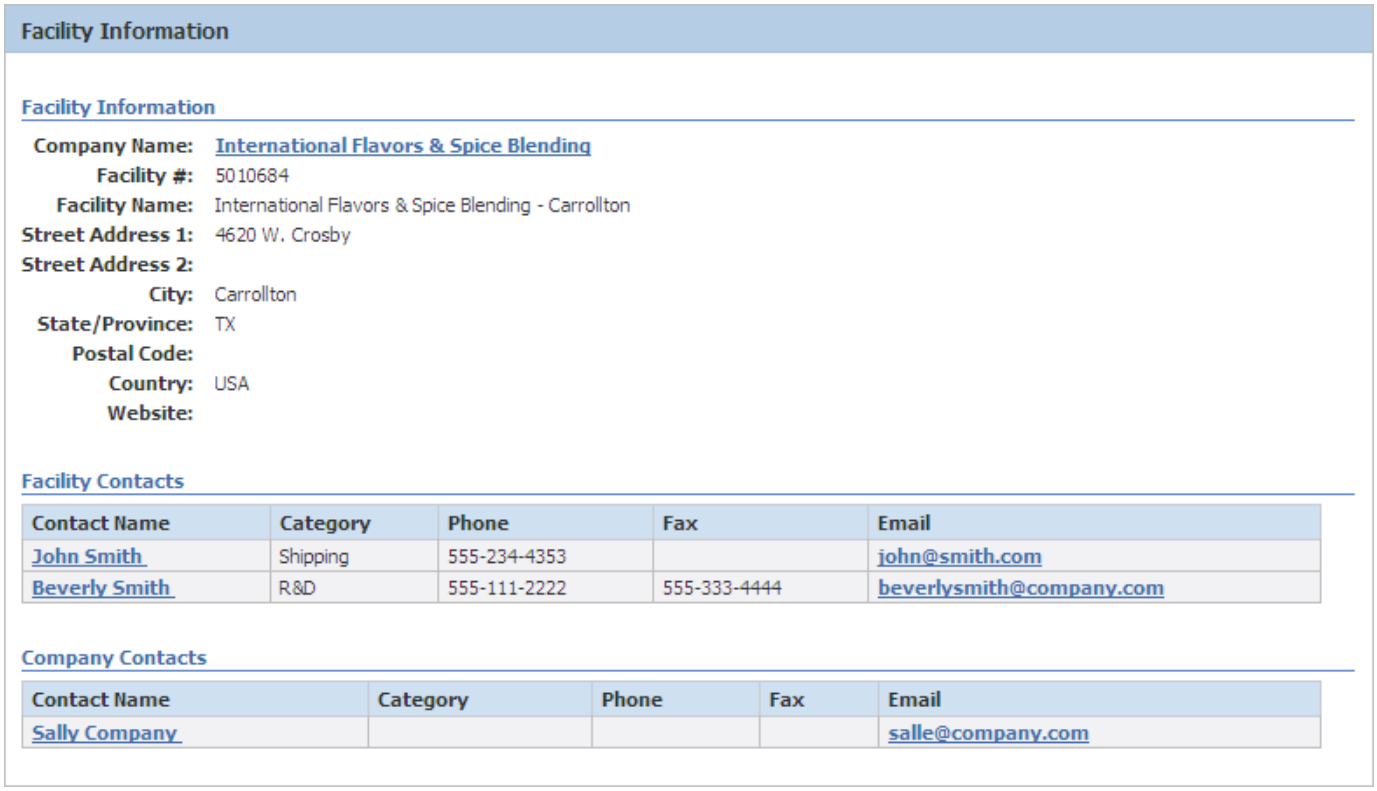
Select a business unit from the drop-down list and click **Search**. All facilities within that business unit are displayed.

Figure 2-19: Contacts page



Select a facility from the Facility Name column. Supplier Portal displays the Facility Information dialog box shown in figure 2-20 below.

Figure 2-20: Facility Information dialog box



Facility Information

Facility Information

Company Name:	International Flavors & Spice Blending
Facility #:	5010684
Facility Name:	International Flavors & Spice Blending - Carrollton
Street Address 1:	4620 W. Crosby
Street Address 2:	
City:	Carrollton
State/Province:	TX
Postal Code:	
Country:	USA
Website:	

Facility Contacts

Contact Name	Category	Phone	Fax	Email
John Smith	Shipping	555-234-4353		john@smith.com
Beverly Smith	R&D	555-111-2222	555-333-4444	beverlysmith@company.com

Company Contacts

Contact Name	Category	Phone	Fax	Email
Sally Company				salle@company.com

This page displays contact information for the facility as defined in SCRM. Click the linked company name to display the Company Information dialog box shown in figure 2-21 below.

Figure 2-21: Company Information dialog box



Company Information

Company #:	5010661
Company Name:	International Flavors & Spice Blending
Street Address 1:	4620 W. Crosby
Street Address 2:	
City:	Carrollton
State/Province:	TX
Postal Code:	75006-6656
Country:	USA
Website:	

Contacts for the facility and the facility's parent company are displayed in the Facility Contacts and Company Contacts sections. Click on any contact name to view contact information in the Contact Information dialog box, shown in figure 2-22 below.

Note Contacts have to be flagged as "Publish to Supplier Portal" in SCRM to be listed here.

Figure 2-22: Contact Information dialog box



Managing Supplier Contact Information

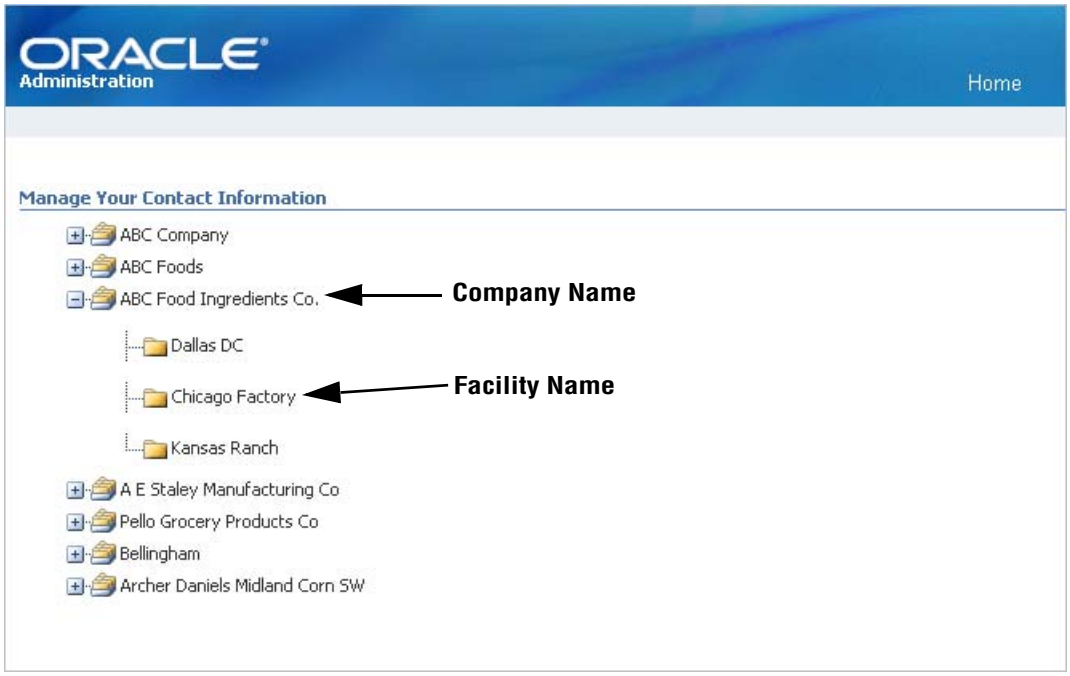
Supplier contact information can be shared from the Supply Chain Relationship Management (SCRM) application. If the contact information is shared, the supplier can view and manage that information from Supplier Portal.

The manage contact feature enables suppliers to manage their contact information and keep it accurate on an ongoing basis.

Clicking the **Administration** link displays the Administration page shown in figure 2-23 below.

Note The Administration link displays only if the contact has at least one associated supplier. This association is made in Supplier Portal Administration (SPA).

Figure 2-23: Administration page, Manage Your Contact Information

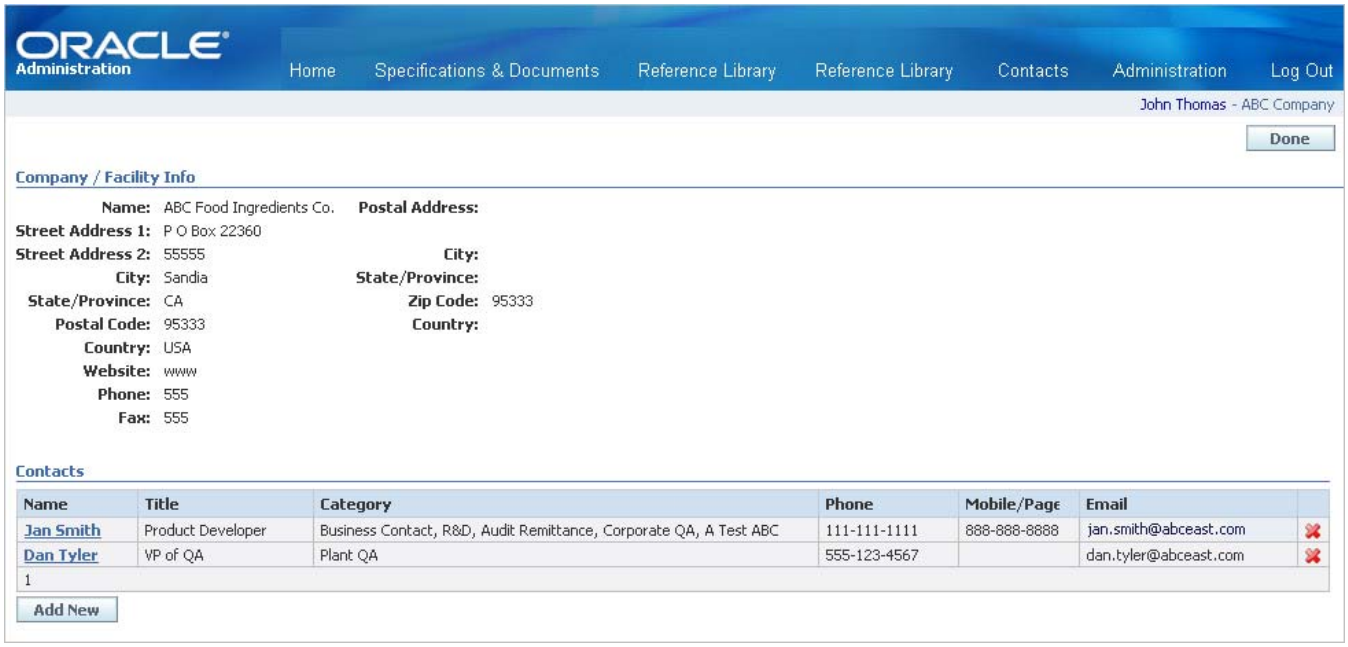


In SCRM, contacts can be assigned at both the company and facility level. The supplier sees all the companies and facilities he or she has been assigned to. This page lists all of the contacts that are set to be published to the supplier. The contacts are listed by company and further filtered by facility.

The supplier selects the company name to see the company contacts located on the company profile, or selects the facility name to see the facility contacts located on the facility profile.

Refer to *Using Supplier Portal Administration* on page 3-1 for more information on how an administrator associates a supplier to a contact. The supplier can click on either a supplier's company or a facility name to view the associated contacts. Figure 2-24 below shows the summary page for the selected company or facility.

Figure 2-24: Summary page for selected company or facility



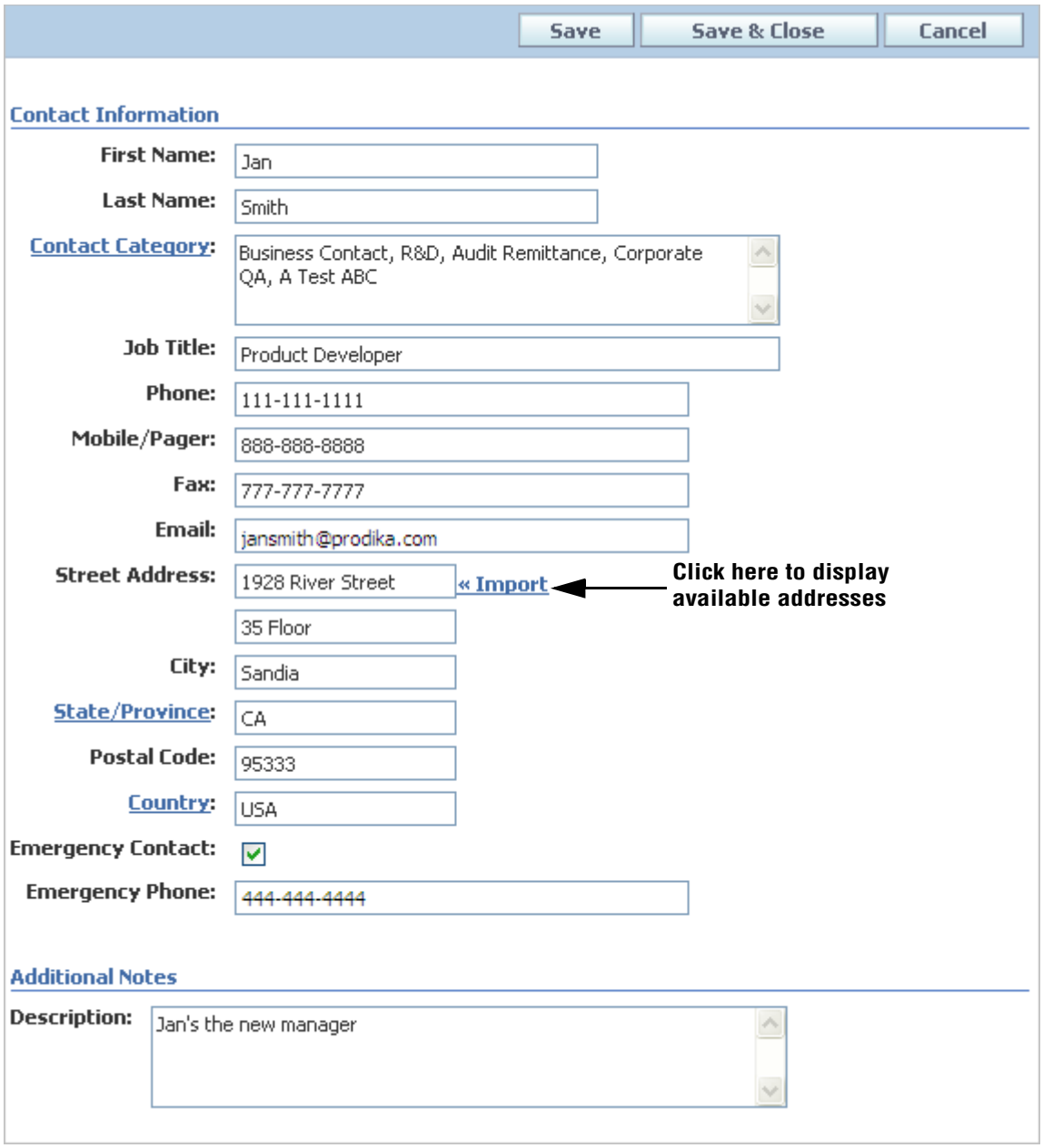
The supplier has several options for managing contacts:

- Clicking the name link displays the details about the supplier contact.
- Clicking the delete icon ( ) deletes the contact.
- Clicking **Add New** displays the Contact Information page, shown in figure 2-25 below. The supplier creates a new contact using this page.
- Clicking the **Done** button saves changes made to the contact.

Note When a new contact is added to Supplier Portal, the contact is added to the corresponding company or facility in SCRM.

The Contact Information dialog box provides contact details, as shown in figure 2-25 below.

Figure 2-25: Contact Information page with contact information populated automatically



The address of the contact can be imported from other addresses stored in the system. Clicking the **Import** link displays the dialog box shown in figure 2-26. The dialog box displays addresses that are associated with this supplier. The supplier can click one of the addresses to use that address.

Figure 2-26: Contact addresses



CHAPTER 3

Using Supplier Portal Administration

This chapter describes how an administrator uses Supplier Portal Administration. It includes the following topics:

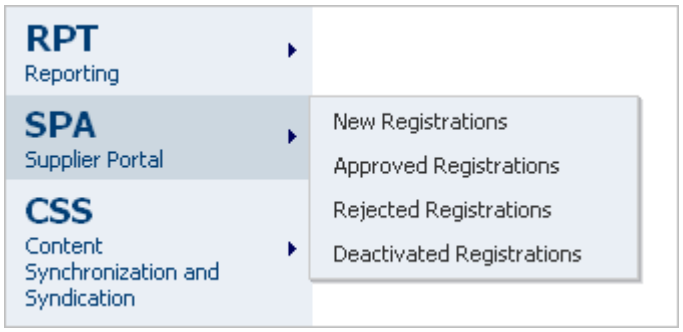
- *Accessing Supplier Portal Administration*
- *Processing New Registration Requests*
- *Managing Approved Registrations*
- *Managing Rejected Registrations*
- *Managing Deactivated Registrations*

Accessing Supplier Portal Administration

Note This chapter is written for company administrators who use Supplier Portal Administration (SPA) to manage suppliers who register for and use Supplier Portal.

Company administrators use the Supplier Portal Administration (SPA) application to control access to Supplier Portal. The SPA menu choices represent administrative tasks associated with Supplier Portal registrations, as figure 3-1 shows below:

Figure 3-1: Menu choices



The following menu choices are available:

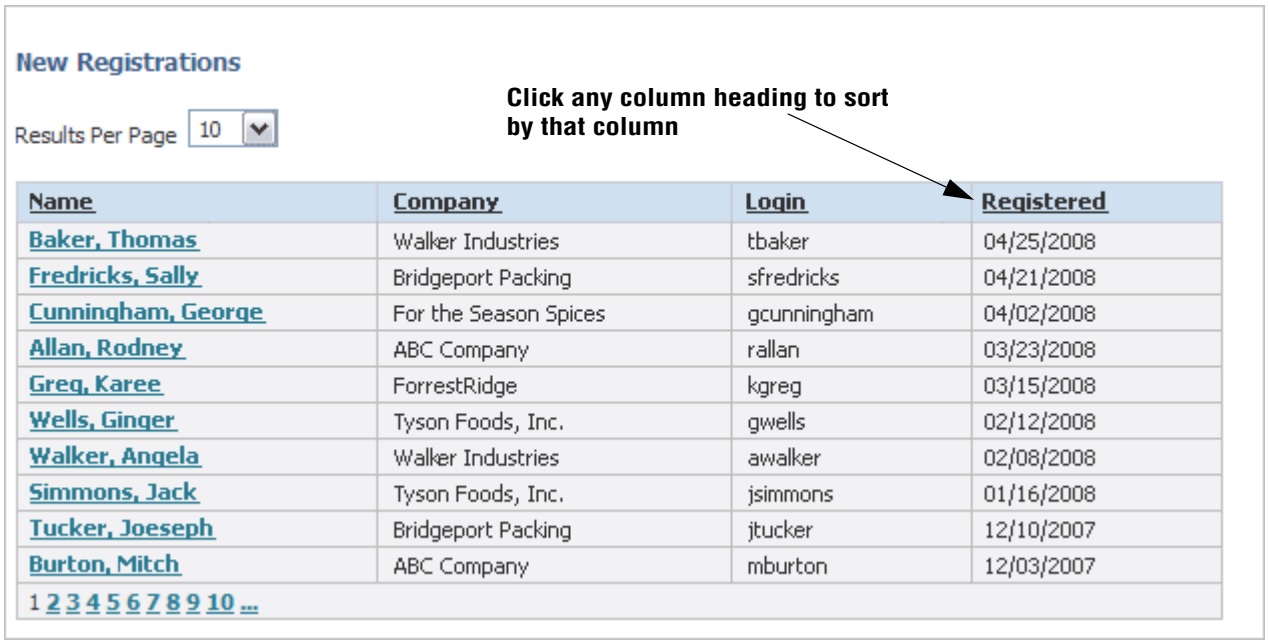
- **New Registrations**—Use this option to manage requests from users wanting to access Supplier Portal for the first time.
- **Approved Registrations**—Use this option to manage all approved users.

- **Rejected Registrations**—Use this option to manage all users who were not approved.
- **Deactivated Registrations**—Use this option to manage users who were once approved and are now deactivated.

Processing New Registration Requests

When a supplier requests access to Supplier Portal, a new registration request is created in SPA. The New Registrations page lists registrants waiting for approval, as shown in figure 3-2 below.

Figure 3-2: New Registrations page



Supplier Representative Editor Page

Clicking the hypertext name link located in the gray shaded area displays the registration request on the Supplier Representative Editor page, as shown in figure 3-3 below.

Figure 3-3: Supplier Representative Editor page



The administrator uses the three tabs on this page to review and approve the registrant.

Company Information Tab

The Company Information tab displays all the company information that the registrant supplied. The administrator can use this page to update the company information if necessary. Note that the new registrant is not yet associated with any company or facility in SCRM.

Associated Companies and Associated Facilities are key fields. The administrator uses these fields to tie a supplier to companies or facilities. Doing so affects what data the supplier will see inside Supplier Portal.

Click **Edit** to open the page in edit mode.

Assigning Companies or Facilities to a Supplier Portal User

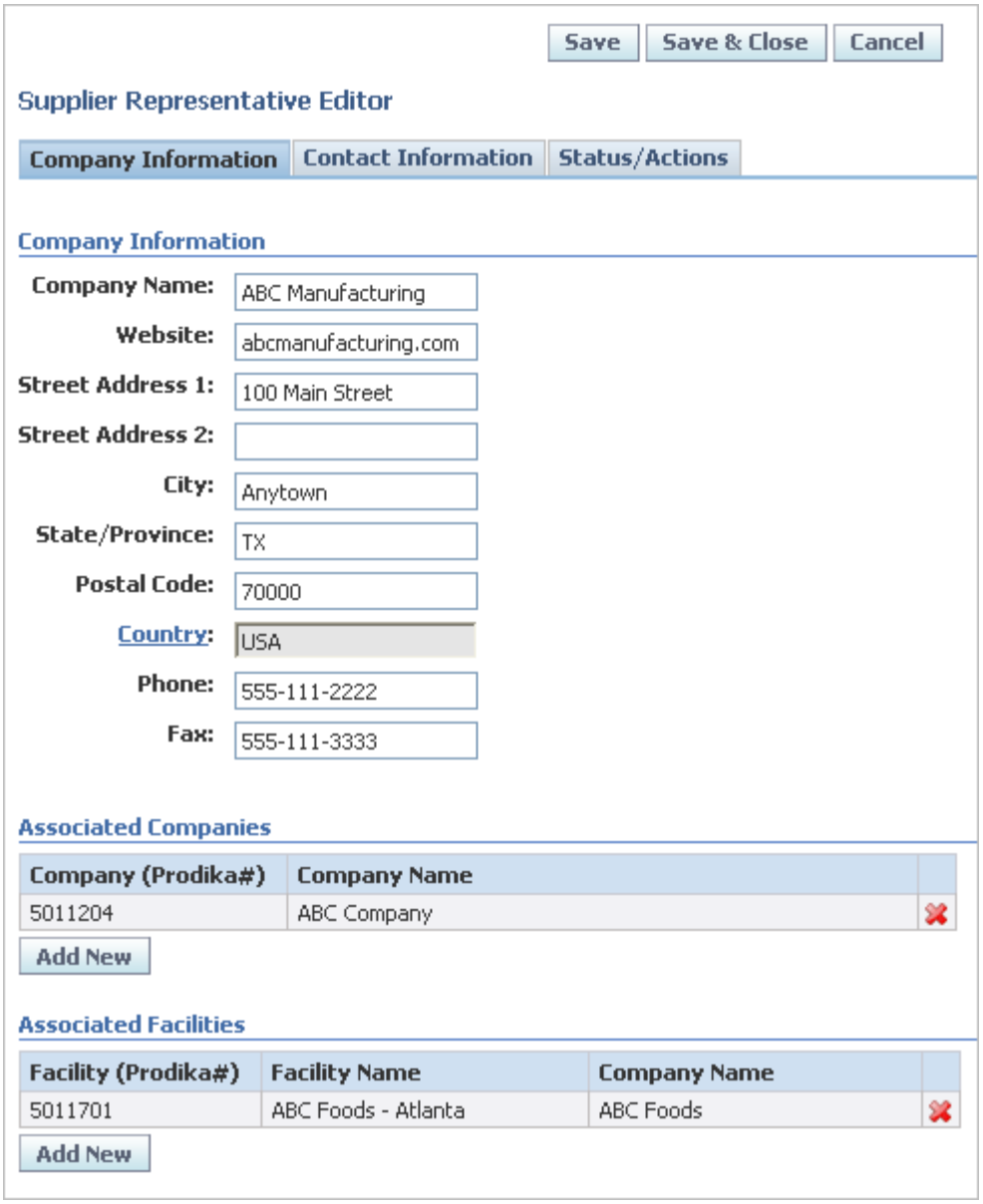
For a registrant to be able to view specifications and contact information in Supplier Portal, he must be associated with one or more companies or facilities. The Associated Companies section contains a table with associated companies; the Associated Facilities section contains a table with associated facilities.

The administrator clicks **Add New** under either table to assign a company or facility to the registrant. This action displays the standard search page. The administrator selects one or more companies or facilities, then clicks **Done**.

Note If a facility is assigned to a registrant, only the specifications, documents and contacts for that facility will be available for viewing. If a company is assigned to the registrant, data for all facilities belonging to that company will be available for viewing.

Added companies and facilities are displayed in the Associated Companies and Associated Facilities sections, as shown in figure 3-4.

Figure 3-4: Company Information tab with associated company and facility

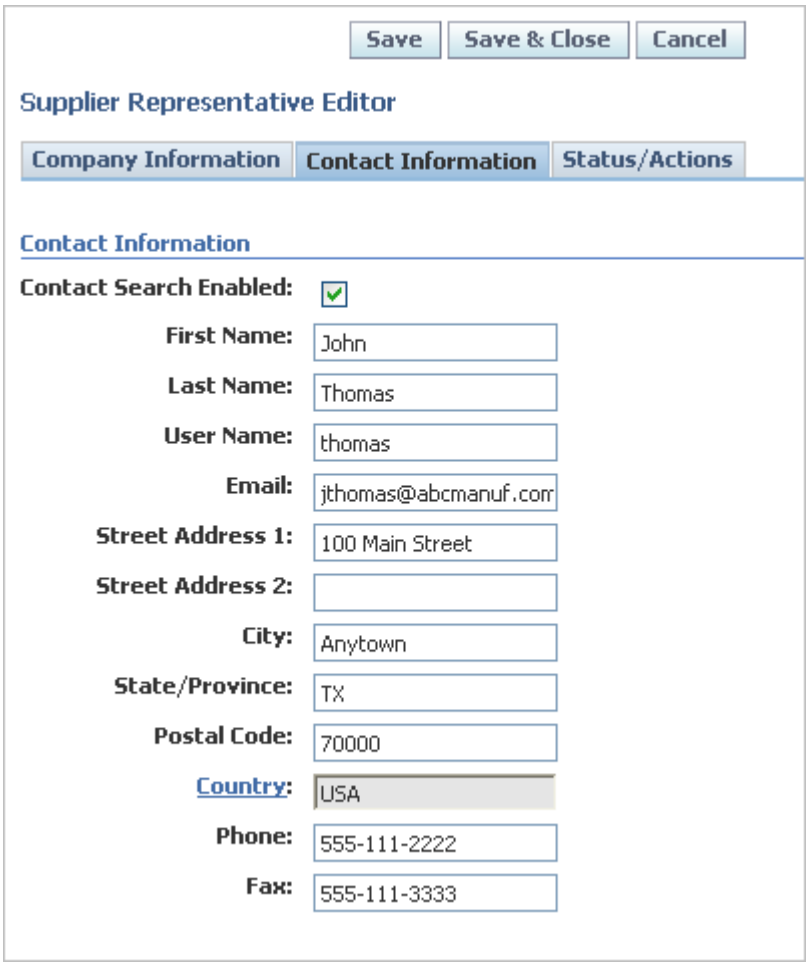


Clicking the delete icon (✖) removes the associated company or facility.

Contact Information Tab

The Contact Information tab, shown in figure 3-5, displays the contact information that the registrant has provided.

Figure 3-5: Contact tab with registrant information in edit mode



The user name is automatically generated by the system. The administrator can change the user name if needed.

Status/Actions Tab

The Status/Actions tab, shown in figure 3-6, displays the current status of the registrant. This tab has three sections:

- **Next Action**—Shows the actions possible on this user at this time. The administrator can either approve or reject a new request by clicking the appropriate button. The system sends an email if the registrant is approved.
- **Current Status**—Displays the time stamp when the request was made and the status of the user request.
- **Event History**—Displays events that have been performed.

Figure 3-6: Status/Actions tab



If the administrator clicks **Approve**, the current status will change to "Approved" and an event will be added to Event History. On approval, an email will be sent to the registrant, informing him that his account is now active.

At this point, the registration request will no longer be visible on the New Registrations page.

If the administrator clicks **Reject**, the current status will change to "Rejected" and an event will be added to Event History.

At this point, the registration request will no longer be visible on the New Registrations page and will be visible on the Rejected Registrations page.

The administrator must click **Save** or **Save & Close** for the changes to take effect.

Managing Approved Registrations

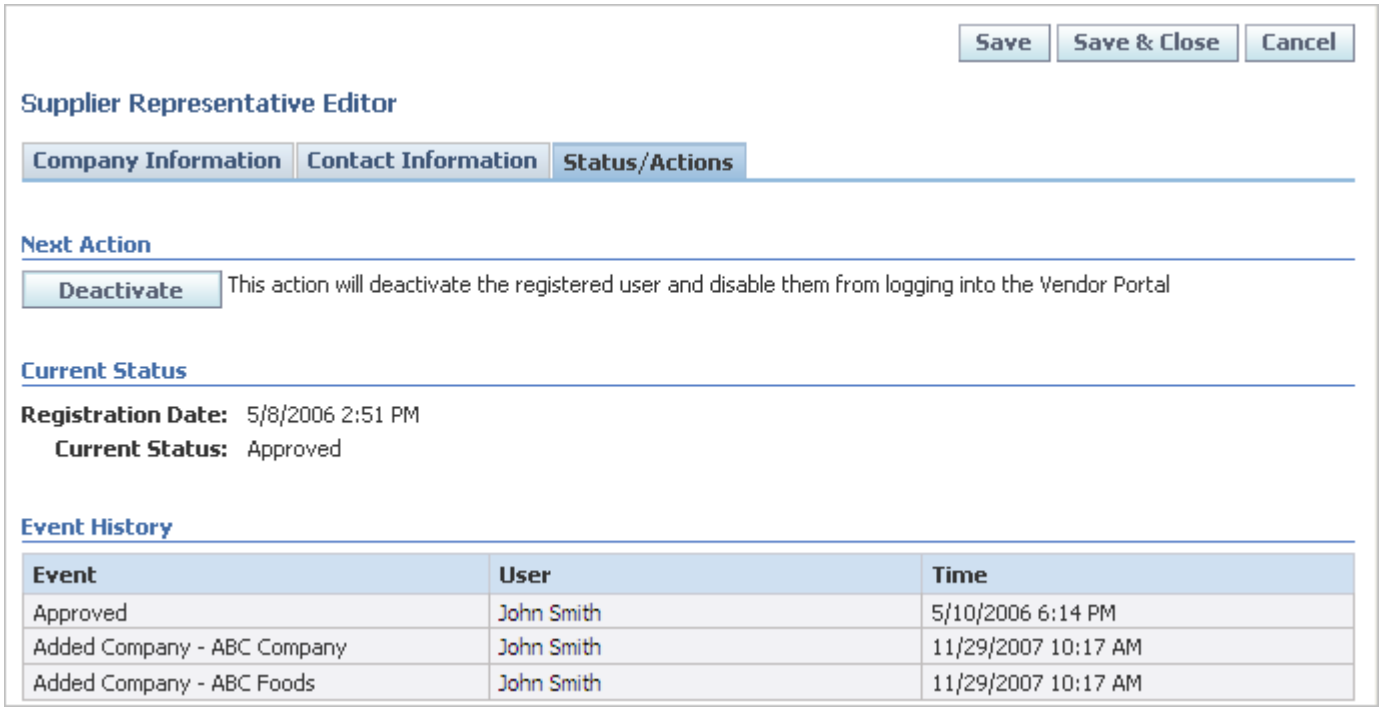
The Approved Registrations page displays all of the registrants that have been approved to access Supplier Portal, as figure 3-7 shows below.

Figure 3-7: Approved Registrations page



To obtain more information about the registrant, the administrator can click on the first and last name link on the Approved Registrations page. The Supplier Representative Editor page displays, as described on pages page 3-2 through page 3-6. The administrator clicks **Edit** to edit information on this page. Figure 3-8 shows the page in edit mode.

Figure 3-8: Supplier Representative Editor page in edit mode

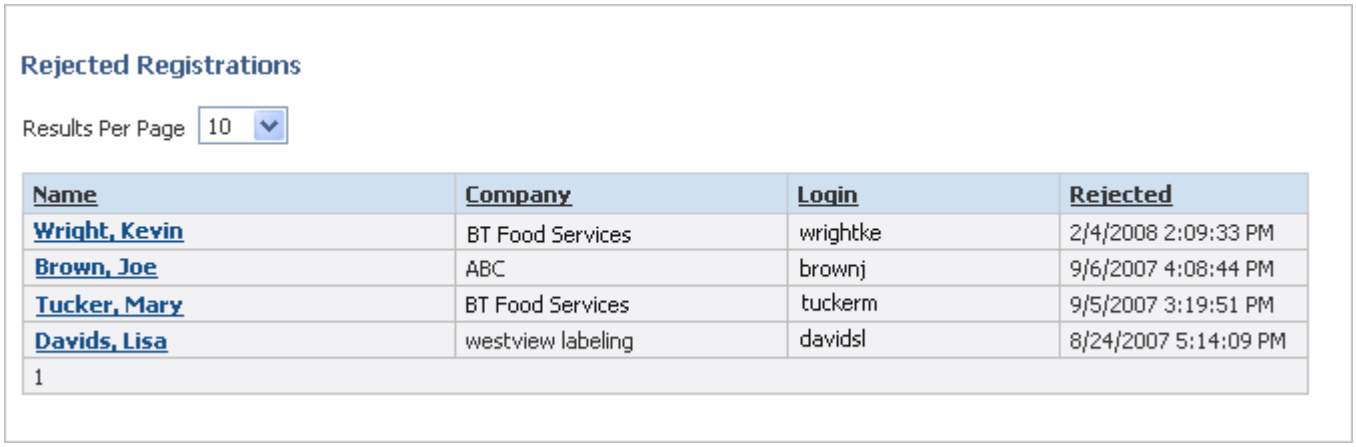


To deactivate a registrant, the administrator clicks **Deactivate**, then **Save**. A deactivated user can no longer access Supplier Portal and will not be visible on the Approved Registrations page. The registrant will be visible on the Deactivated Registrations page.

Managing Rejected Registrations

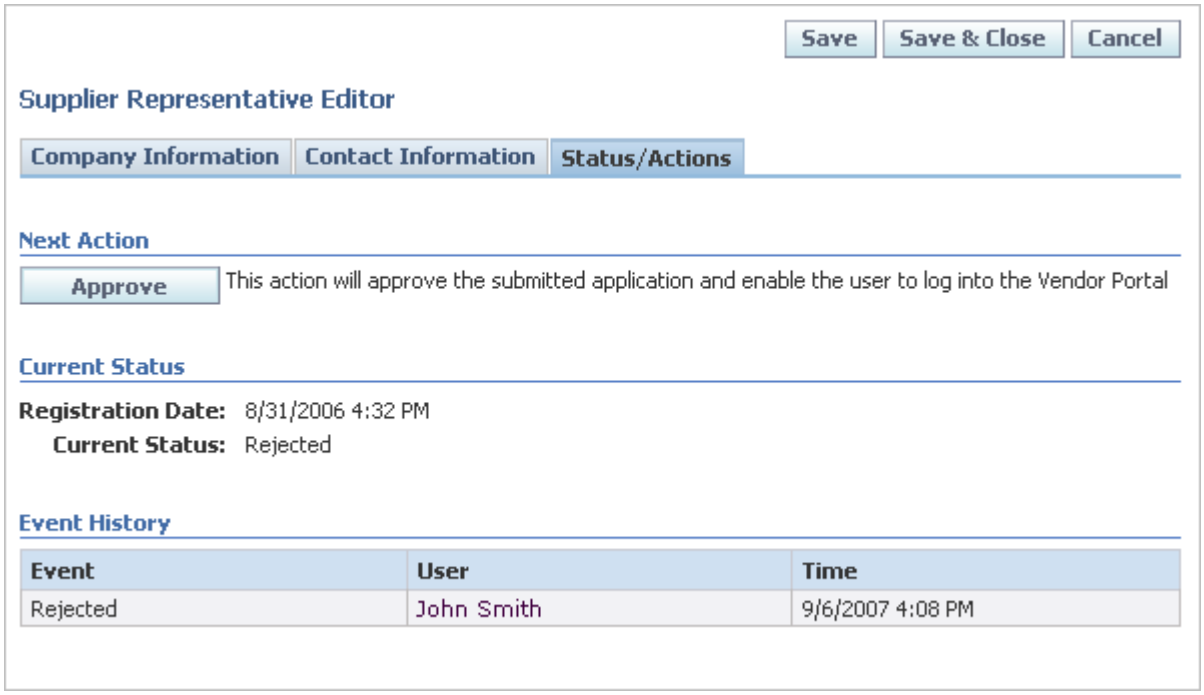
The Rejected Registrations page displays all of the registrants who have been rejected access to Supplier Portal, as figure 3-9 shows below:

Figure 3-9: Rejected Registrations page



The administrator clicks on the first and last name link to view more information about the registrant. The Supplier Representative Editor page displays, as described on pages page 3-2 through page 3-6. The administrator clicks **Edit** to edit information on this page, as shown in figure 3-10 below:

Figure 3-10: Supplier Representative Editor page in edit mode



To activate the rejected registrant, the administrator clicks **Approve**, and then **Save**. Once approved, the registrant will be able to access the Supplier Portal site. The registrant will no longer be visible on the Rejected Registrations page and will be visible on the Approved Registrations page.

Managing Deactivated Registrations

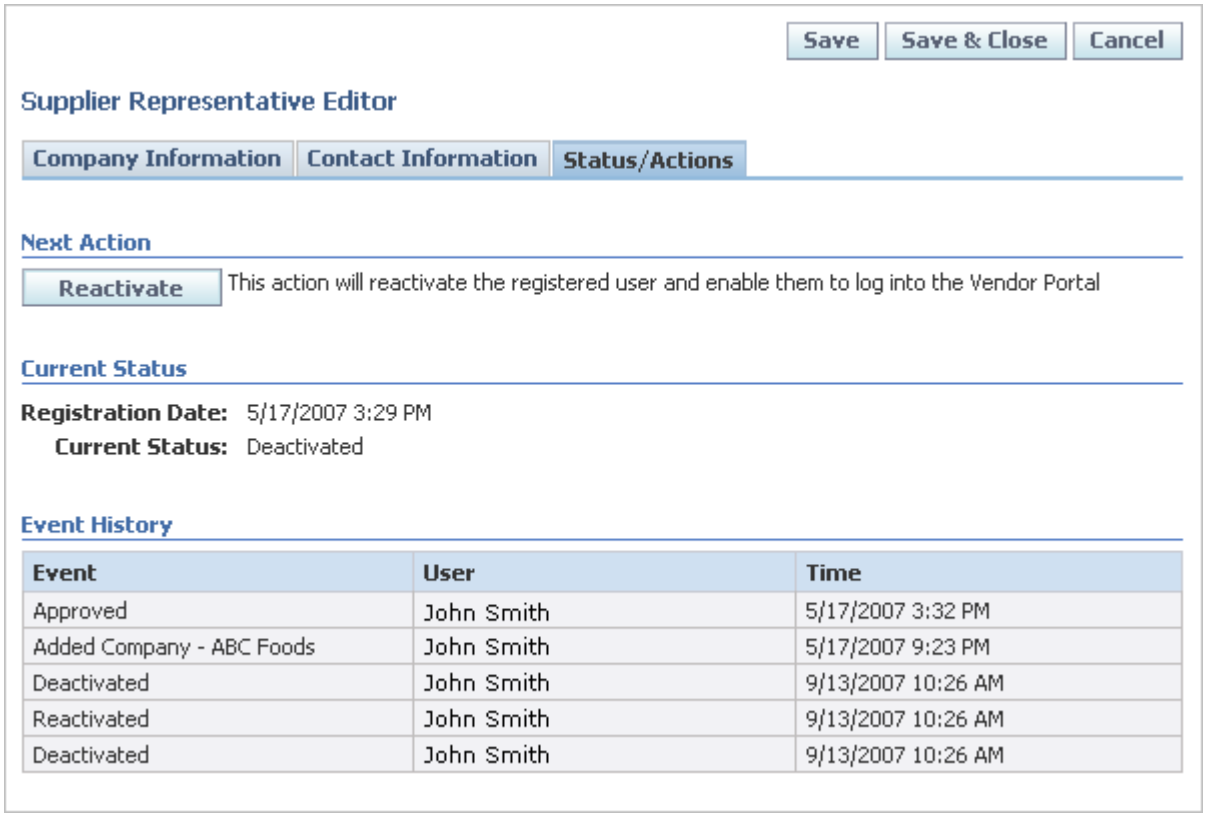
The Deactivated Registrations page displays all of the registrants that have been deactivated. Deactivated registrants are users that do not have access to Supplier Portal. Deactivated registrants were active users at one time. Figure 3-11 shows the Deactivated Registrations page.

Figure 3-11: Deactivated Registrations page



The administrator clicks on first and last name link to obtain more information about the registrant. The Supplier Representative Editor page displays, as described on pages page 3-2 through page 3-6. The administrator clicks **Edit** to edit information on these tabs, as shown in figure 3-12 below.

Figure 3-12: Supplier Representative Editor page in edit mode



To activate the user, the administrator clicks **Reactivate**, then **Save**. Once reactivated, a user will be able to access the Supplier Portal site. The user will no longer be visible on the Rejected Registrations page and will be visible on the Approved Registrations page.