User Training Manual for iSupplier Portal – Supplier Edition

National Guard Health Affairs

Training Manual for NGHA LEO Project

Author:	Evosys
Creation Date:	27-Jun-2011
Last Updated:	13-May-2012
Document Ref:	NGHA_User_Training_Manual_iSupplier_Portal_Supplier_Edition_V2.0
Version:	2.0

Approvals:

Document Control

Change Record

Date	Author	Version	Change Reference
13-May-2012	Evosys	1.0	No Previous Document

Reviewers

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Introduction

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.

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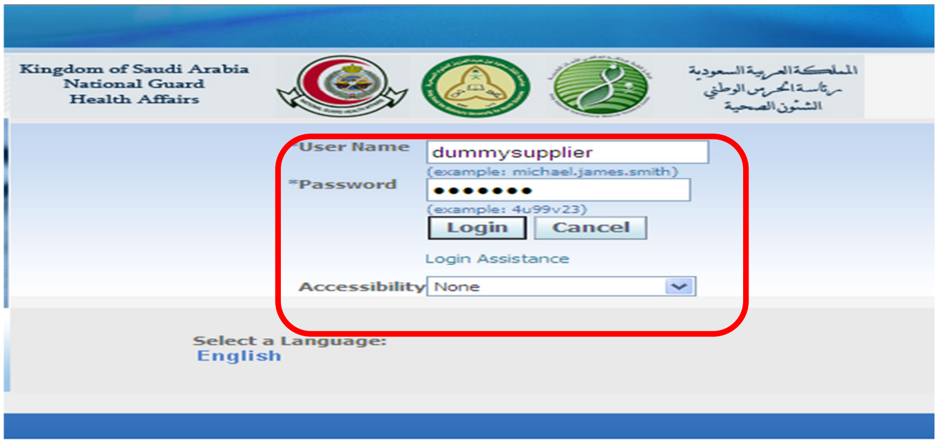
Objectives

The objective of this manual to ensure that Key Users understand how to perform the following topics:

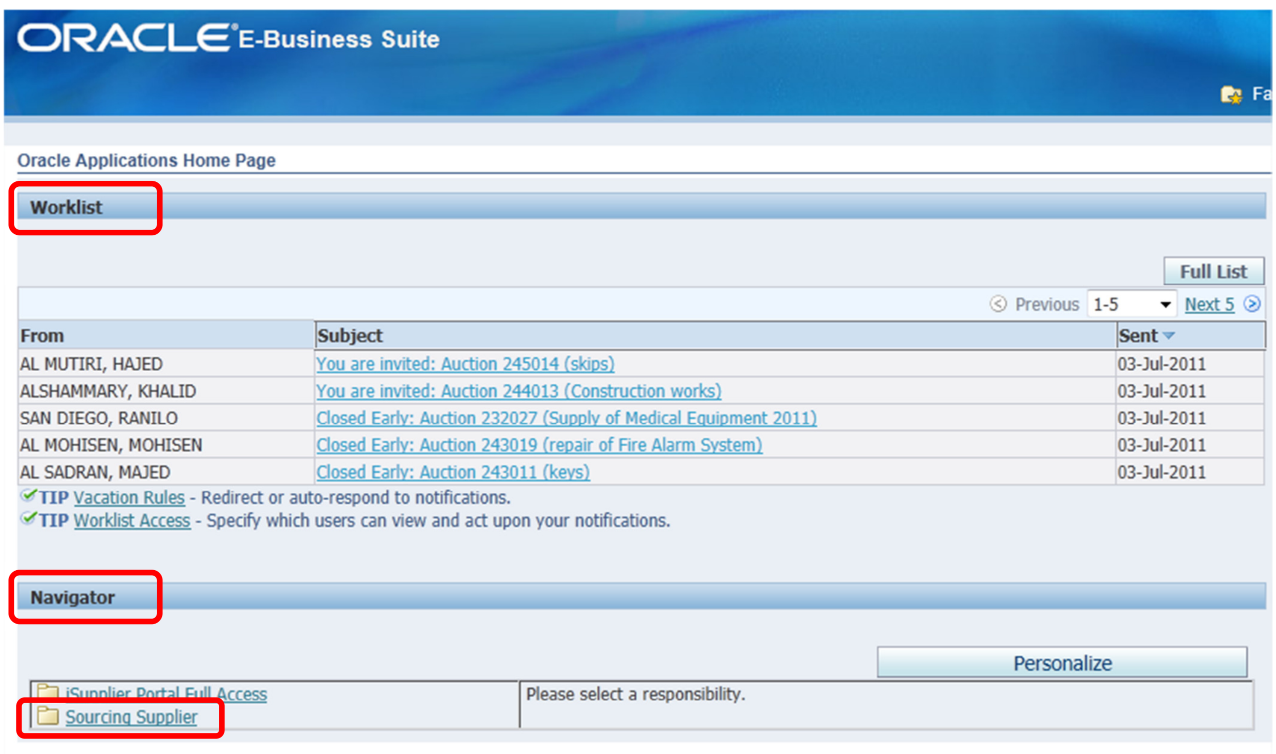
- Response to RFI / RFQ / Auction
- Purchase Orders
- Shipment Notice and Overdue shipments
- Invoice Information
- Managing Profile

1. Response to RFI / RFQ

Visit NGHA website, and open Oracle Login Page:



Login with your company's username and password for Oracle iSupplier Portal access.

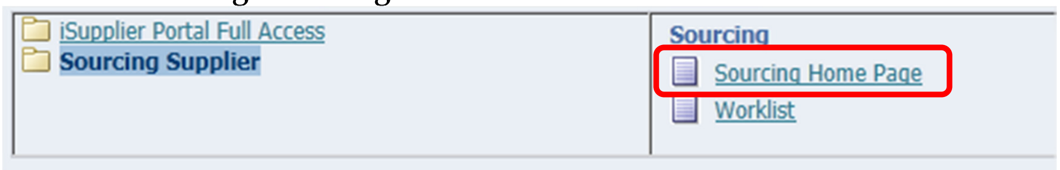


After login you will get Oracle home page.

On Oracle home page, you can check you latest notifications under '**Worklist**' and for further access of other functions you can click on various links under '**Navigator**'

To create a Response (bid) against RFQ / Auction, click on **'Sourcing Supplier'**

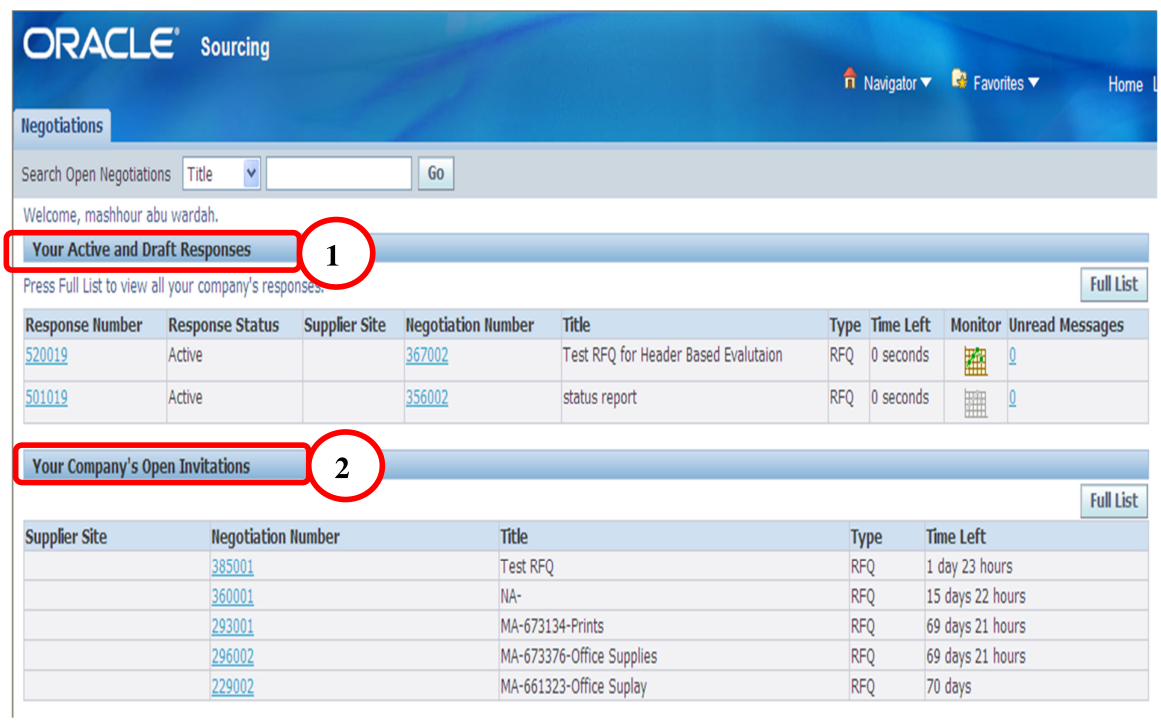
Click on **'Sourcing home Page'.**



Screen Shot of **'Sourcing home Page'**:

Basically below two things will be available, under sourcing home page:

1) **Your Active and Draft Responses**:- *Your Active and Draft Responses* shows the negotiations that you have responded to (Active) or are in the process of creating a response for (Draft). A Response Number is assigned to each draft that you have saved or response that you have submitted. You click the Response Number to view the response details.
2) **Your Company's Open Invitations**:- It shows any negotiations that you have been invited to participate in, but have not yet responded to. The negotiation **Type** (RFI, RFQ or Auction) and the **Time Left** to submit a response are displayed in this section. You click a **Negotiation Number** to view or print negotiation details or to respond to a negotiation.



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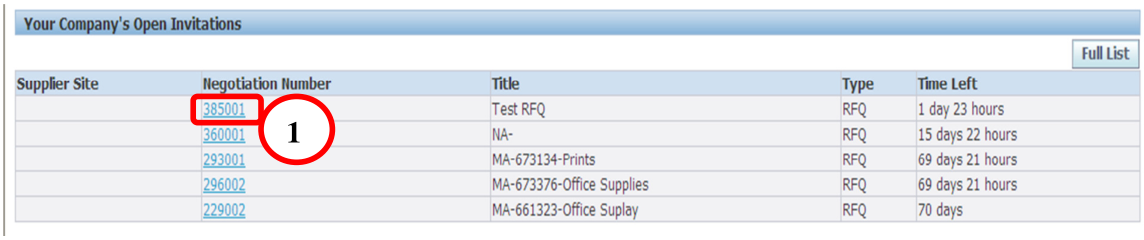
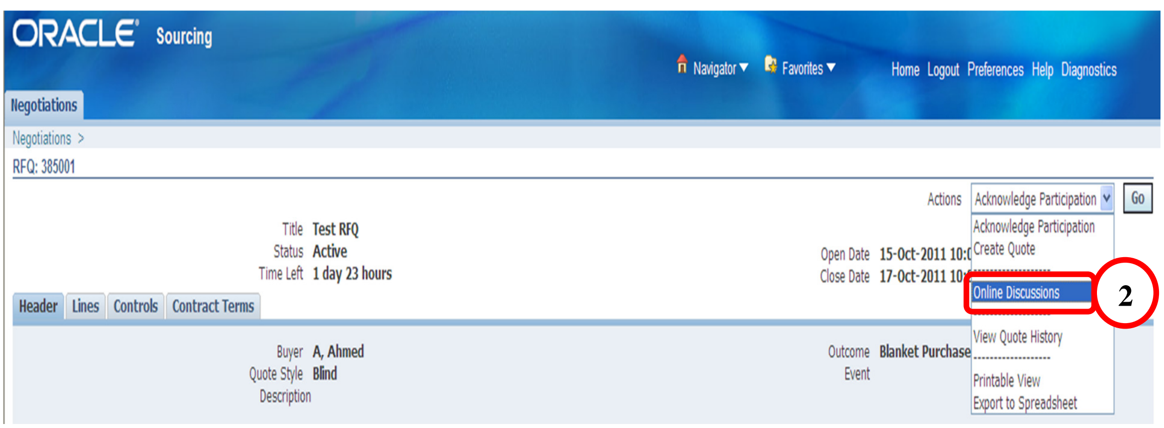
Online Discussion with the Buyer

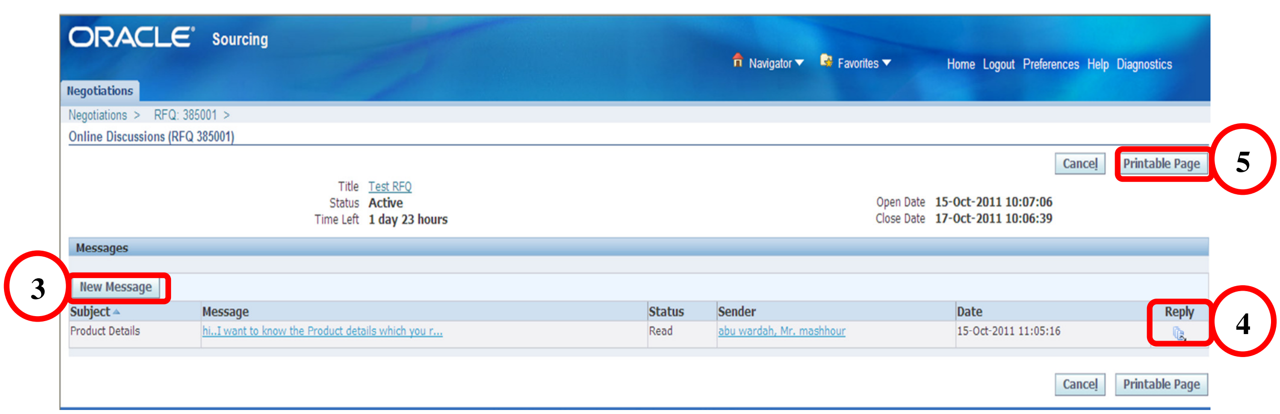
The way to access online discussion is as follows:-

- Click a negotiation number, see **1** below, and proceed with step **2**.



On a negotiation summary page, select **Online Discussions** from the Actions drop-down list and click the **Go** button.





You can take any of the following actions on the Online Discussions page:

- **To start a new discussion:** Click the New Message button as shown below in step 3.Enter a subject and message and then click the Send button.
- **To read a message:** Click a message clink.
- **To reply to a message:** Click the Reply button in the opened message or on the Online Discussions page in step 4. The original message text is quoted in the message area. You might want to delete the original message text before entering and sending your reply.
- **To print all messages associated with the discussion:** Click the Printable Page button in step 5.

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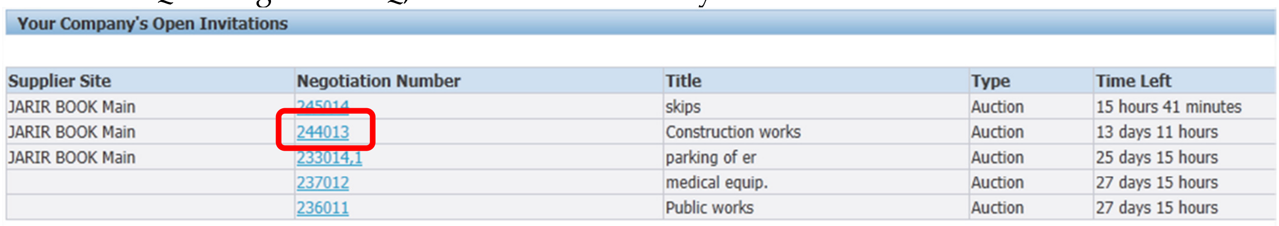
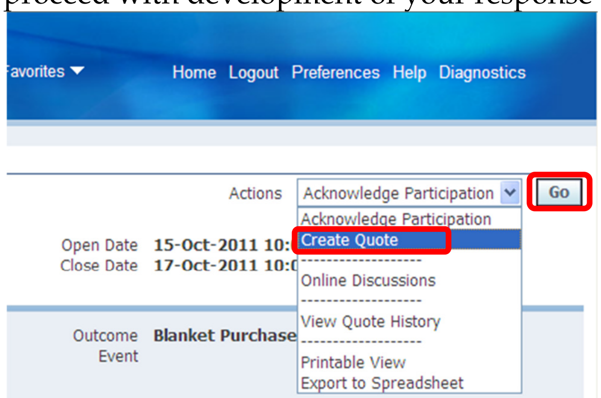
Create Quotation against RFQ

To create a Quote against RFQ, select the same from your invitation list.

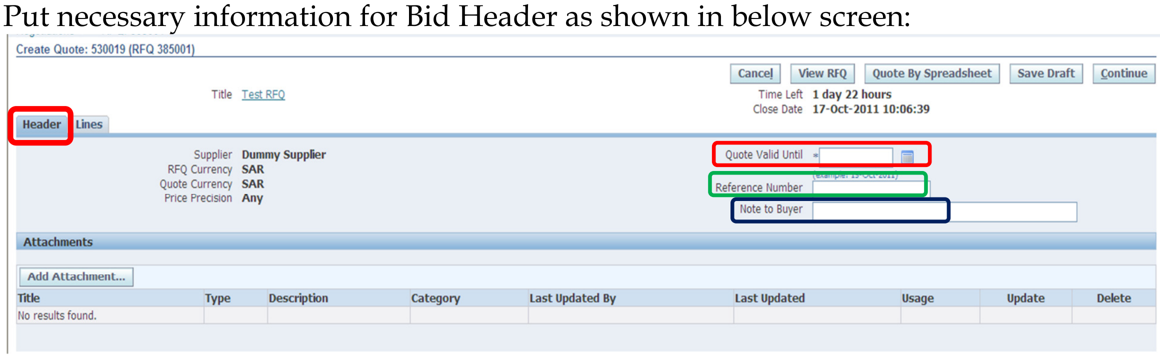


Select '**Create Quote**'from the drop down list of values and click the **'Go'** button to proceed with development of your response to the RFQ online.



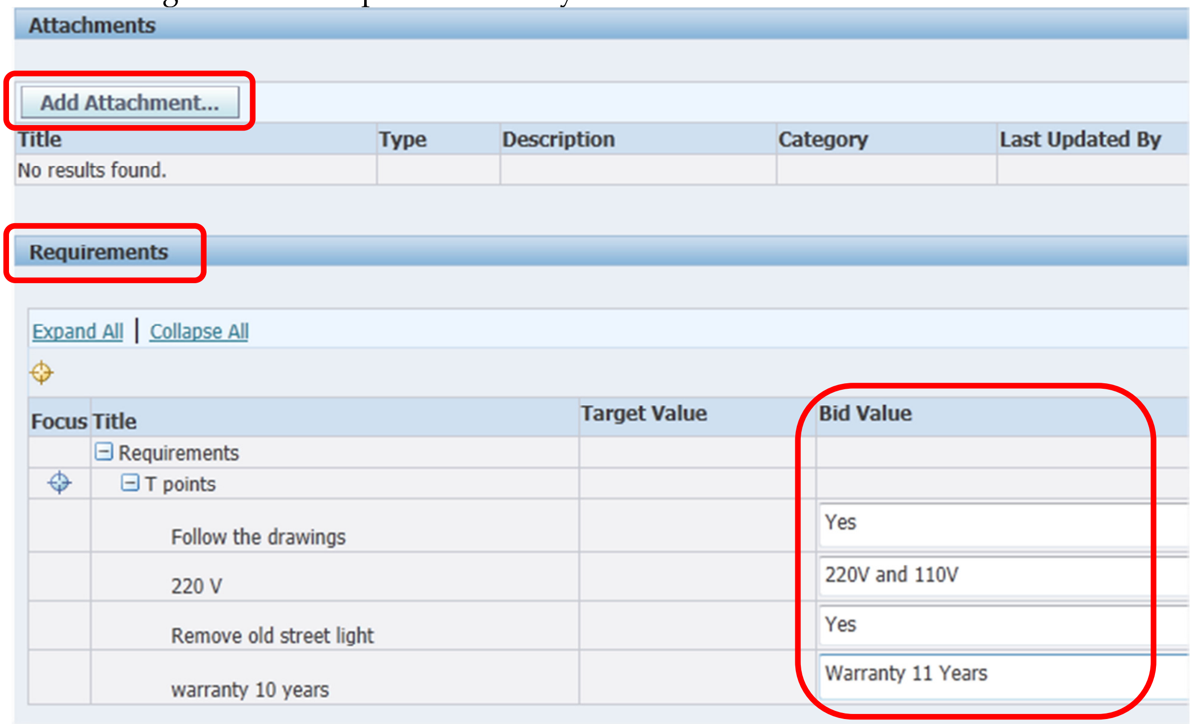
1.1 Bid Header:

Put necessary information for Bid Header as shown in below screen:



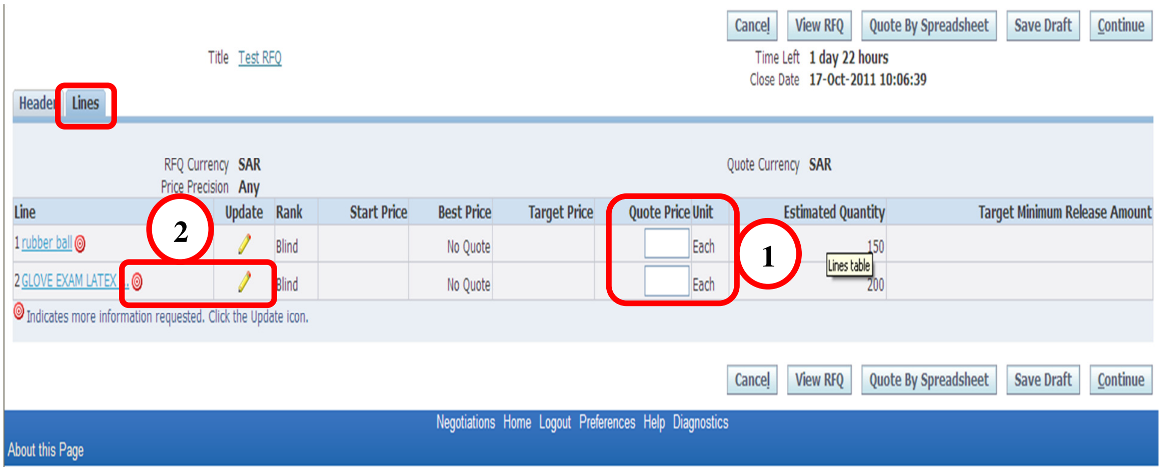
1) **Quote Valid Until:** Enter last date of validity of your quote. This value should reflect the validity of the information you provide within the RFQ response.
2) **Reference number:** The reference number is for your internal tracking only.
3) **Note to Buyer:** Any notes typed to buyer will be received by the buyer upon receipt of your response.

In lower half of page, you can make attachment for RFQ and you also need to enter your Bid Value against each Requirement set by NGHA.

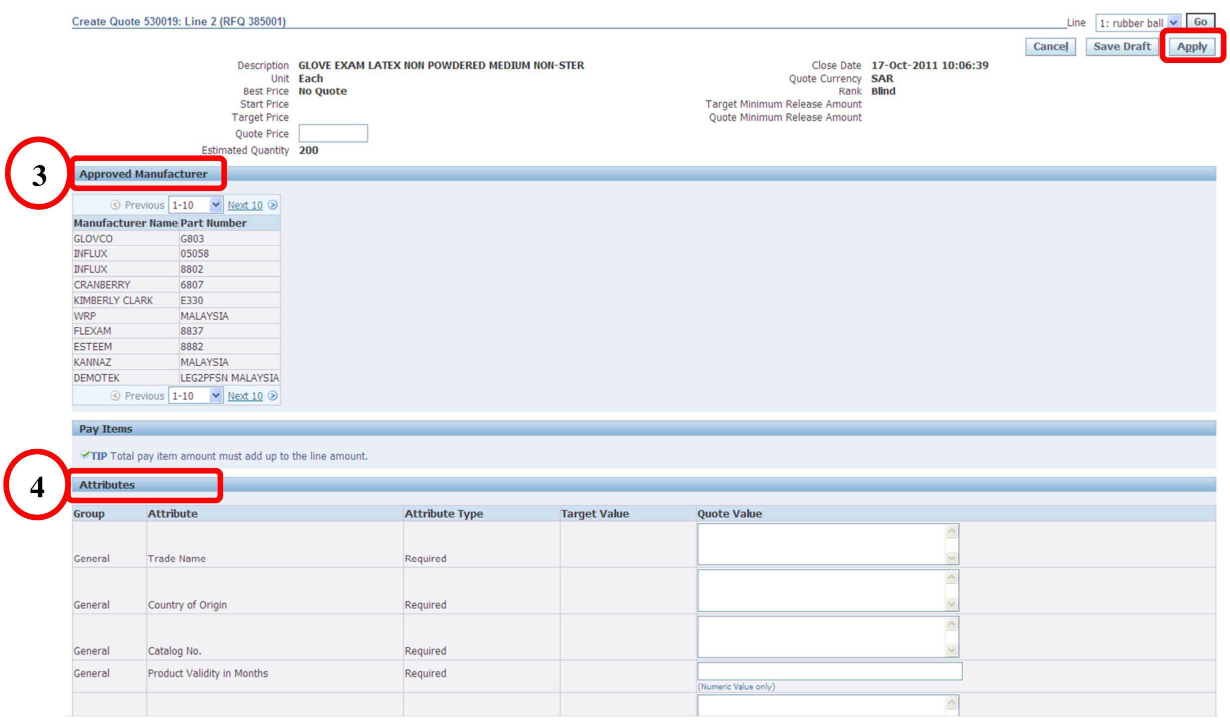


1.2 Bid Lines:

Click on 'Lines' tab and enter your Quote price for each RFQ Lines.

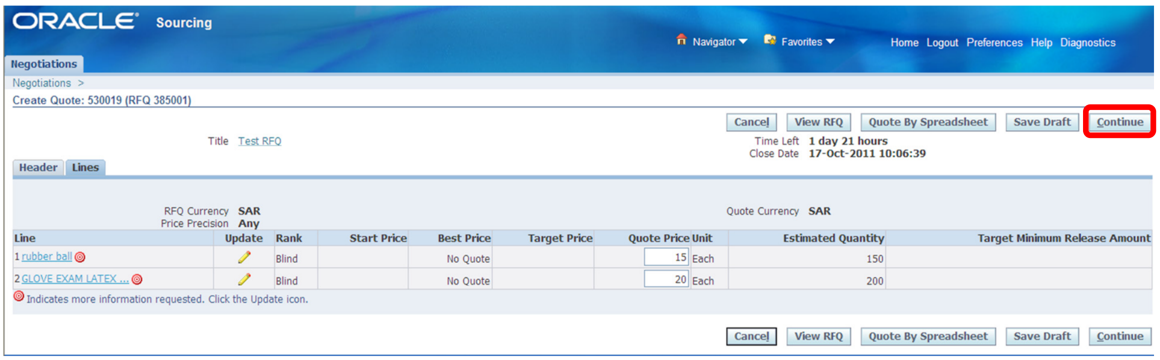


1) **Quote Price Unit**:- Supplier will mention key prices for each line of the RFQ
2) **Update:**- If a target symbol is present next to any of the Update (pencil) icons, click the pencil icon to drill down and respond to the line level attributes; see **2** above. Notes to the Buyer and Attachments can also be added at the line level by clicking the pencil icon. The next page gives instructions on how to enter line level attributes.

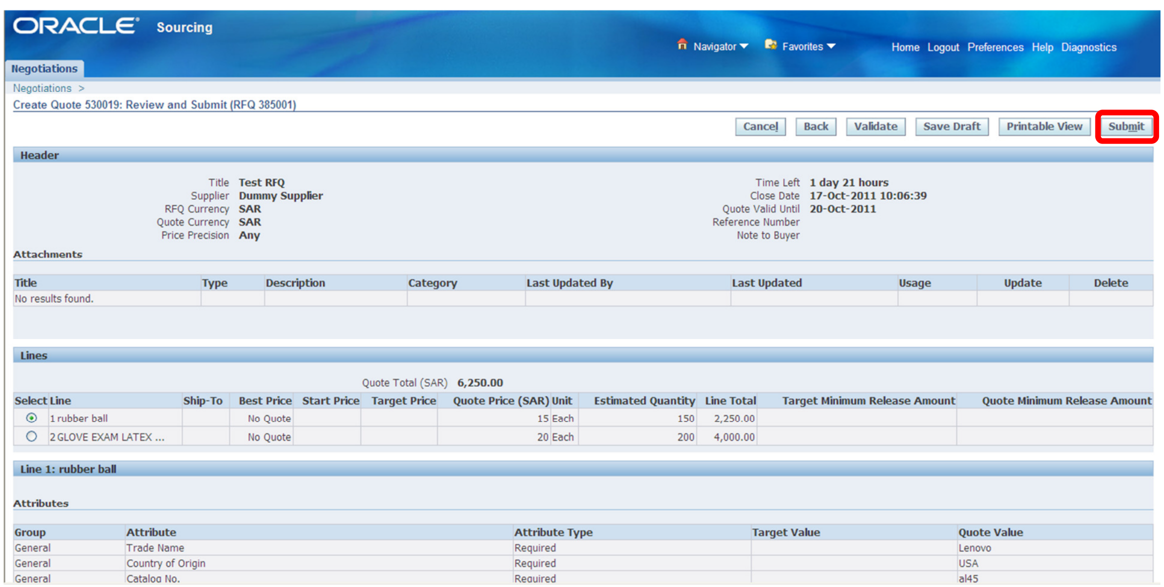


3) **Approved Manufacturers:-** The Appproved manufacturer shows the List of the Approved Manufacturer Name and their Part number for that particular Item.
4) **Attribute:-** Supplier is required to fill additional line level details for that item such as Trade name, country of origin, catalog no.

Once done filling the Attribute information than you need to Click on **"Apply"**



Click on **"Contine"** to review the bid created by you.



After review, click on **'Submit'** button to finally submit the Quote against RFQ.

2. iSupplier Portal Home Page

Overview

Oracle iSupplier Portal is a communication tool that enables NGHA and its suppliers to communicate with each other throughout the procure-to-pay process. It allows suppliers to view and manage purchase orders, receipts, invoices and delivery schedules in a real-time system that is available 24 hours a day, 7 days a week (24x7).

Benefits associated with using iSupplier include:

- Offers suppliers an integrated experience by providing access to purchase orders (POs), invoices and payments in one location.
- Improved efficiency by decreasing the number of calls between suppliers and Accounts Payable.
- Provides a central location for all PO information, and gives suppliers access to historical PO information.
- Increases on-time payment by using web invoicing which reduces time spent tracking down delayed or held payments.
- Eliminates mail float. When invoices are entered online, NGHA receives them immediately.
- Enhances the visibility of the transactions that occur between NGHA and its suppliers.

On home page click on '**iSupplier Portal Full Access'** and than click on **"Home Page"**

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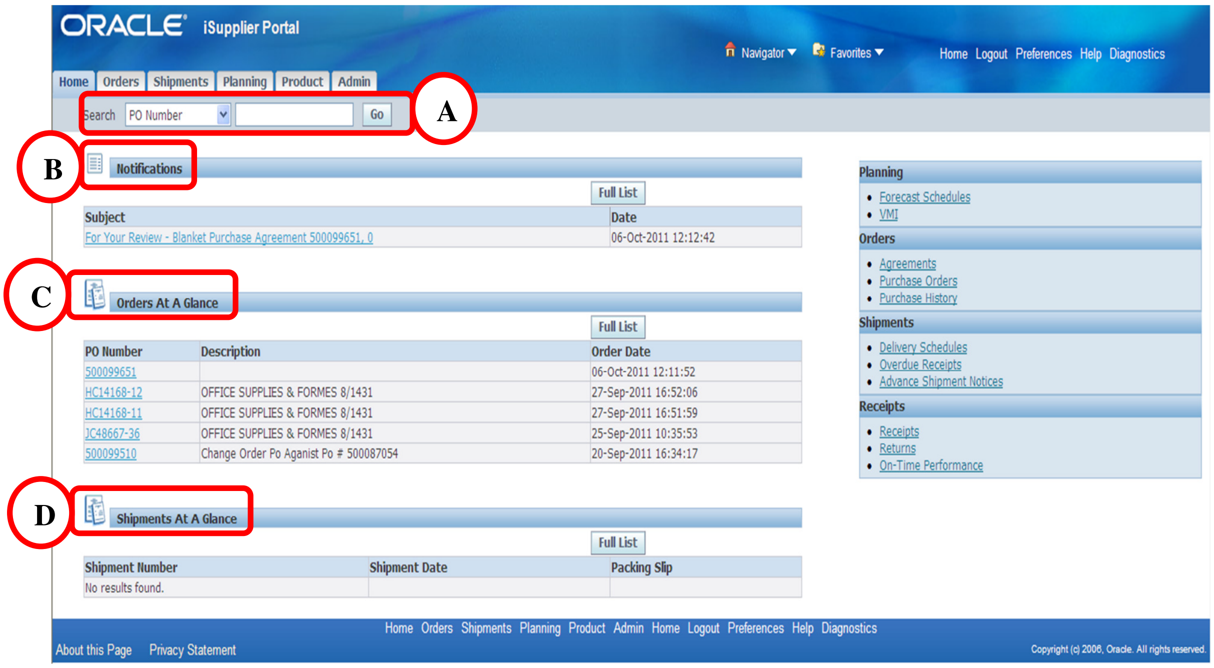
iSupplier Portal Home



On iSupplier Portal Home page you can find following:

1) **Search:-** Noted as **A** above, enables you to jump directly to a specific purchase order, shipment, invoice or payment. To search:-
   a. Select a document type (purchase order, shipment, invoice or payment) from the drop-down list.
   b. Enter the document number.
   c. Click Go.
2) **Notification:-** Noted as **B** above, displays the 5 most recent open notifications. Notifications are copies of the e-mail messages that users receive regarding the transactions that have occurred. Some notifications are view only, while others require action.
   Click on a subject line to view the notification.
   Click the **Full List** button to access the navigation page. A list of the user's notifications is displayed. Some notifications do not require action and are for your information only. You must select View All on this page to view these notifications.

3) **Orders At A Glance:-** Noted as **C** above, displays the five most recent purchase orders.

Click on a PO number link to view the purchase order details.
Click the <Full List> button to view the Purchase Orders page.

4) **Shipments At A Glance:-** Noted as **D** above, displays the Shipment number, Shipment Date and also the Packing Slip information of the suppliers upcoming shipments.

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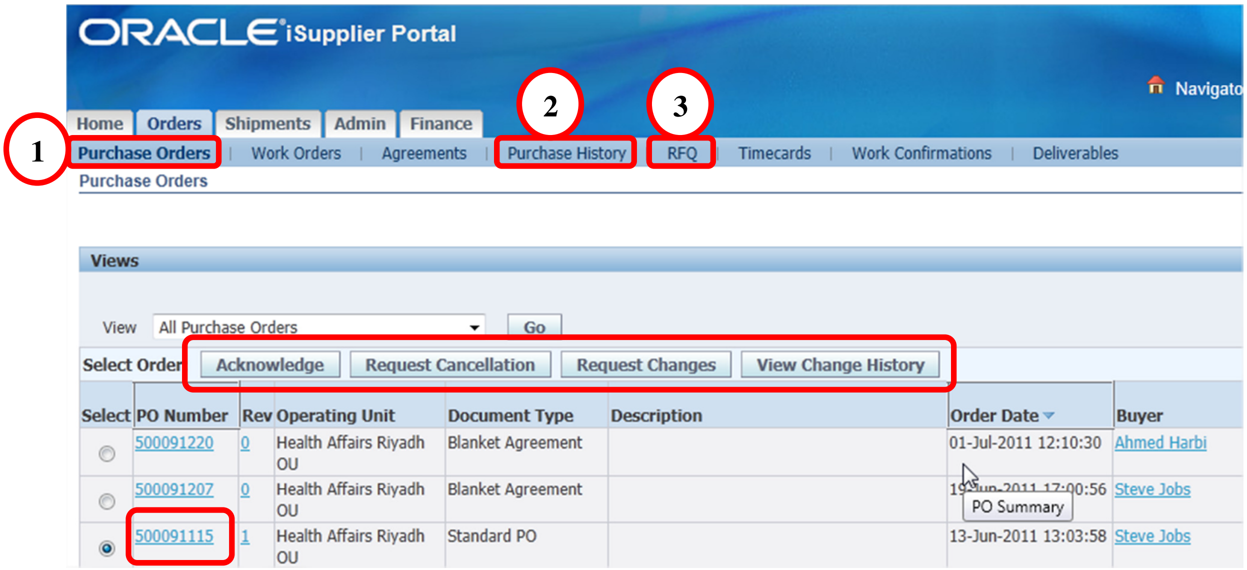
iSupplier Portal Orders Tab



1) **Purchase Orders:-**
Click on any purchase order to see the details.
To make any chage request for PO, select that purchase order and click on '**Request Chagnes'** button.
To cancle entire Purchase Order, select that purchase order and click on **'Request Cancellation'** button.

2) **Purchase History:-**
The Purchase Order Revision History shows all the prior versions of the purchase orders. Similar to purchase orders, you can also create an advanced search with Purchase History.

3) **RFQ:-**
The RFQ page will show all the RFQs where the supplier was a participant. Similar to purchase orders, you can also create an advanced search with RFQ.

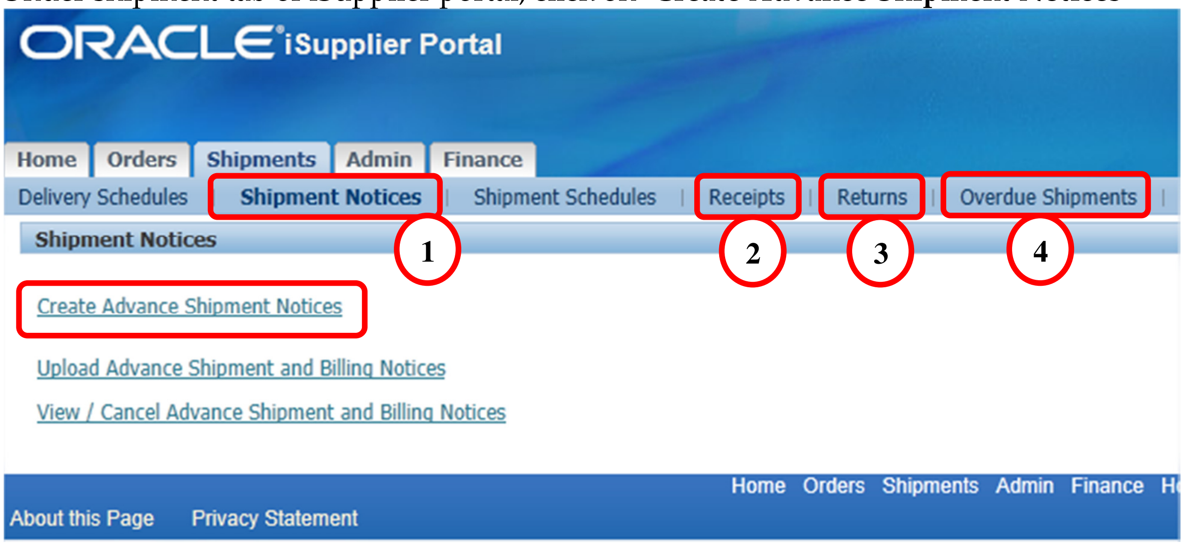
[redacted]

iSupplier Portal Shipments Tab

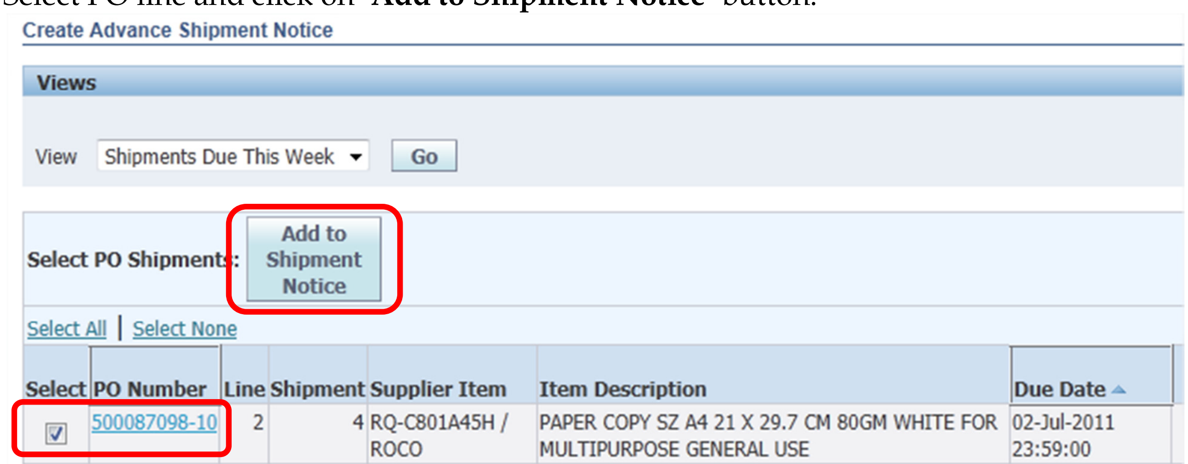
1) **Shipment Notices**

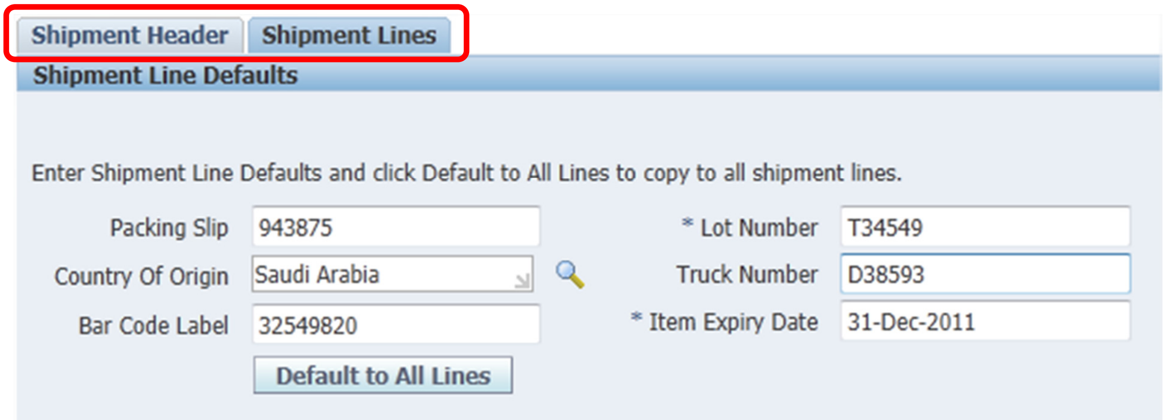
Creating an Advance Shipment Notice (ASN):

Under shipment tab of iSupplier portal, click on ‘**Create Advance Shipment Notices’**

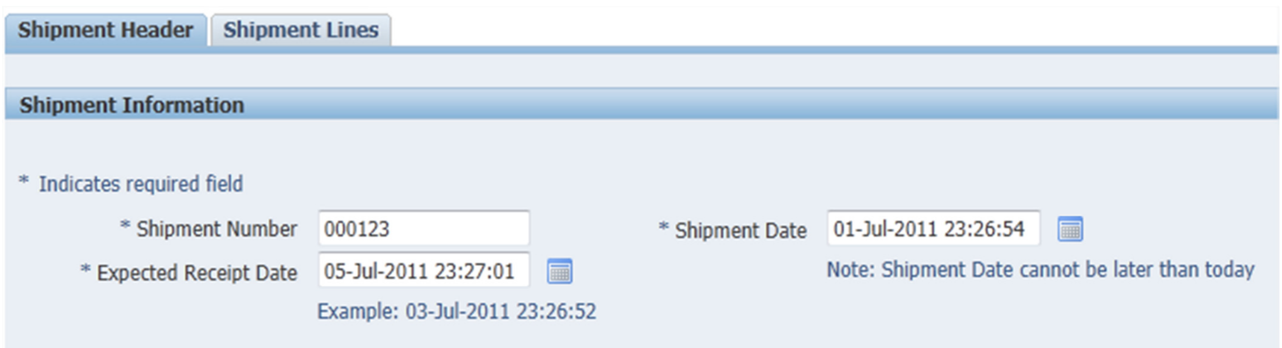


Select PO line and click on ‘**Add to Shipment Notice’** button.





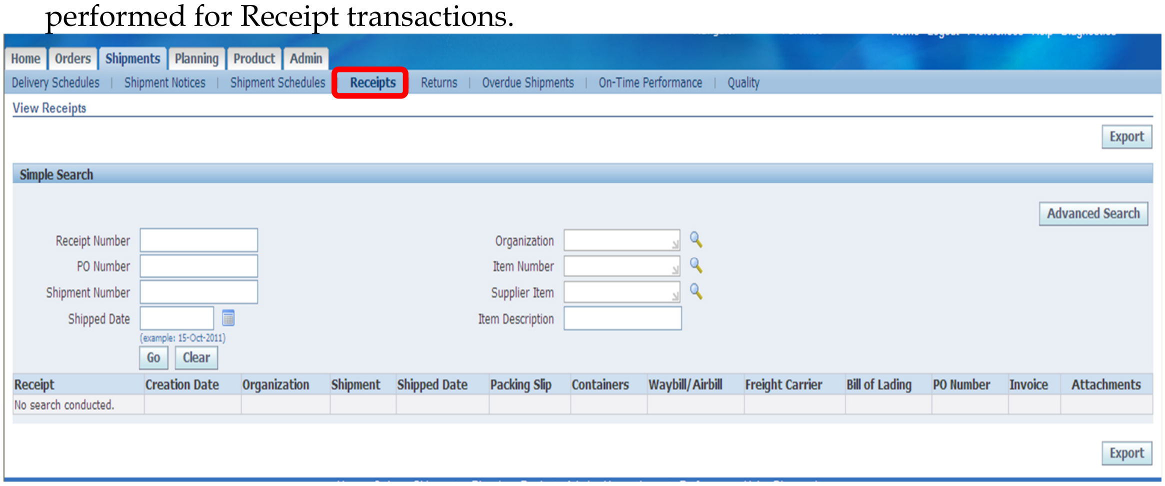
Enter required information at '**Shipment Lines**' level to create shipment notice, and click on **'Shipment Header'**



Enter, **'Shipment Number', 'Shipment Date'** and '**Expected Receipt Date'** at header level and click on submit button to complete Advance Shipment Notice.

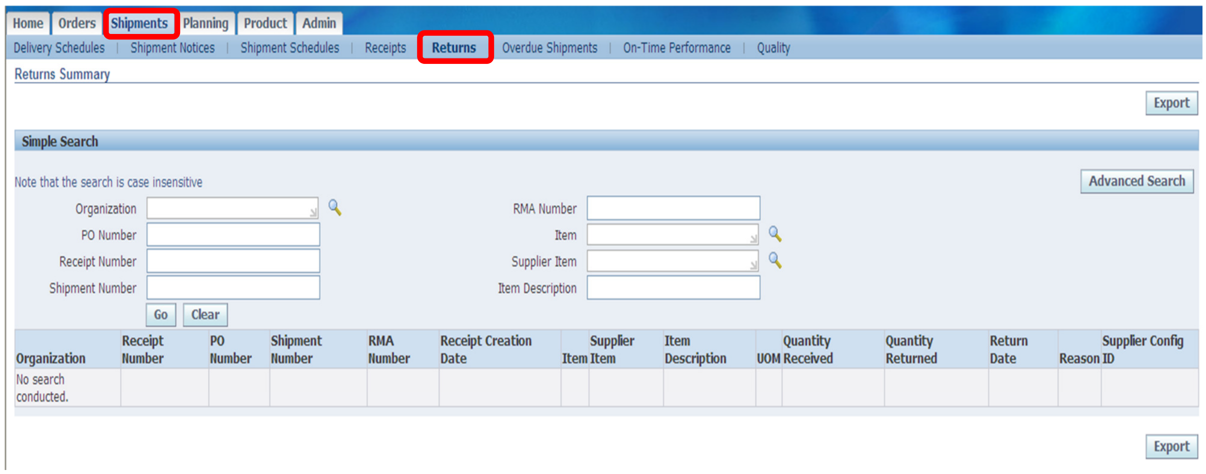
2) Receipts

Under Receipts, users can view items received by NGHA that was processed through the Oracle Purchasing application. Both simple and advanced search can be performed for Receipt transactions.

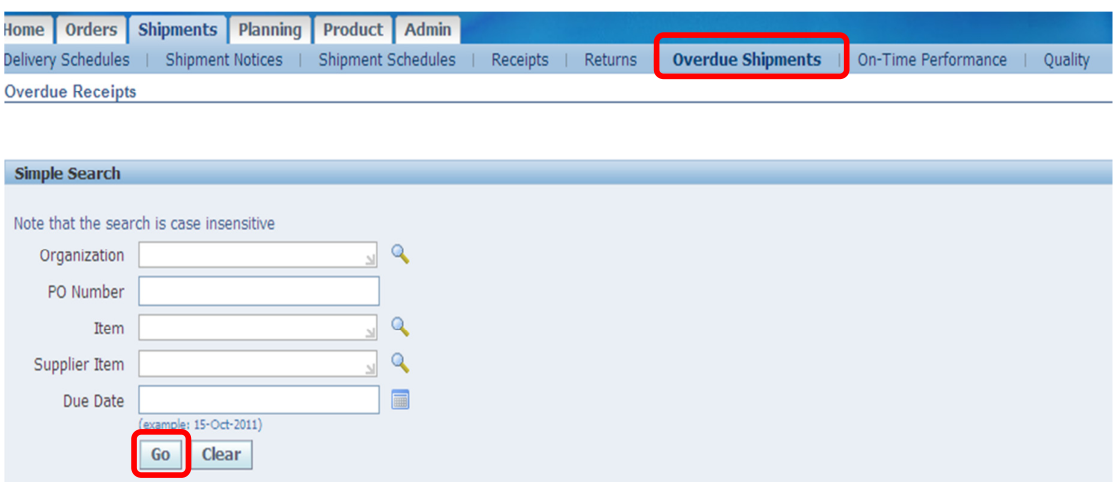


3) Returns

Under Returns, users can view returned items that were processed through the Oracle application. Both simple and advanced search can be performed for Return transactions.



4) Over Due Shipments:

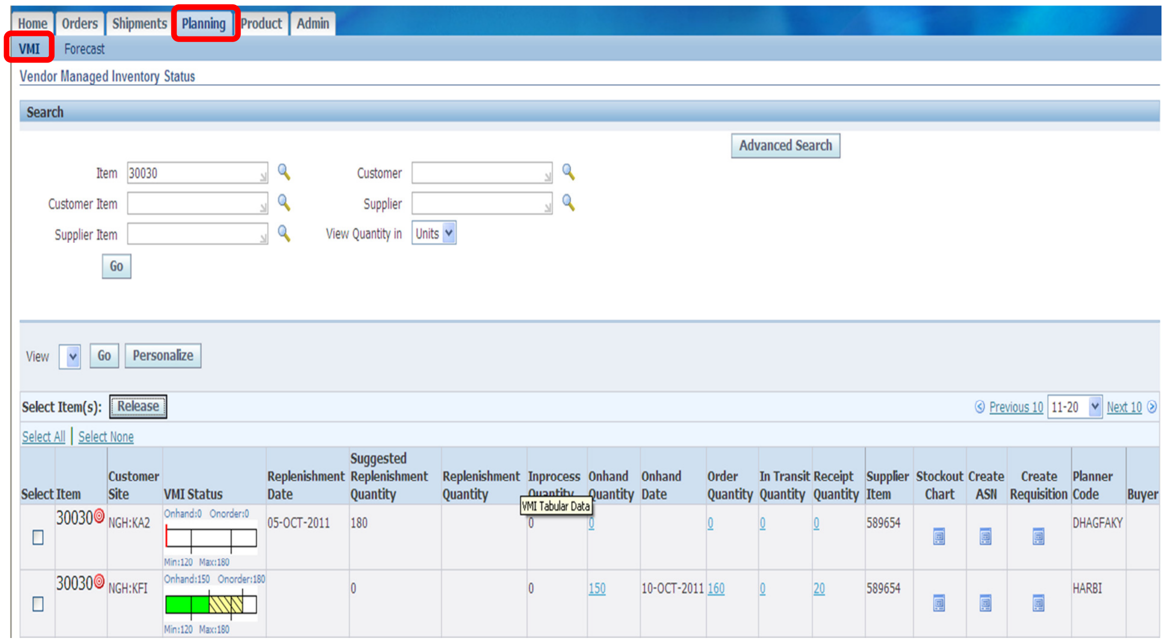


To see your over due shipment, click on 'Go'.

As shown in above screen shot, there are various search parameters, by which you can search your overdue shipments.

[redacted]

iSupplier Portal Planning Tab



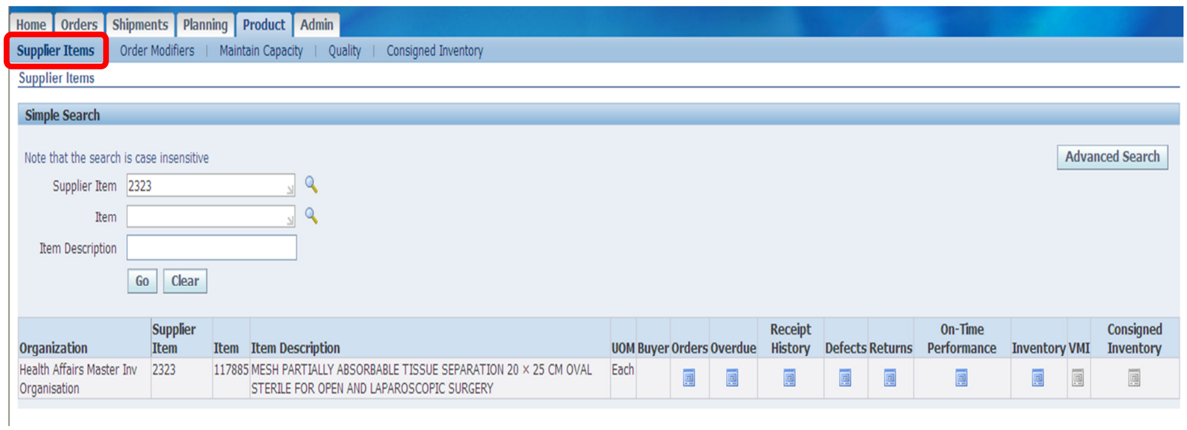
VMI (Vendor Managed Inventory)

Vendor Managed Inventory (VMI) is a procurement and planning practice in which a company delegate's key inventory management functions to its suppliers. Suppliers initiate a replenishment request based on current inventory levels and the customer forecasts. VMI benefits customers through greater service levels and reduced riskof stock-outs. The VMI supplier monitors the current level of inventory items through access into the customer system. The view of inventory is restricted to items for which the supplier has VMI planning responsibility. The supplier can see the balance of on hand stock, in-transit quantities, open requisitions and purchase orders, and other information, such as forecasts.

[redacted]

iSupplier Portal Product Tab

- **Supplier Items**



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

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.

Receipt History

A summary of receipts for the selected item.

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.

On-Time Performance

A summary of receipts for an item that includes due dates, receipt dates, and shipping 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).

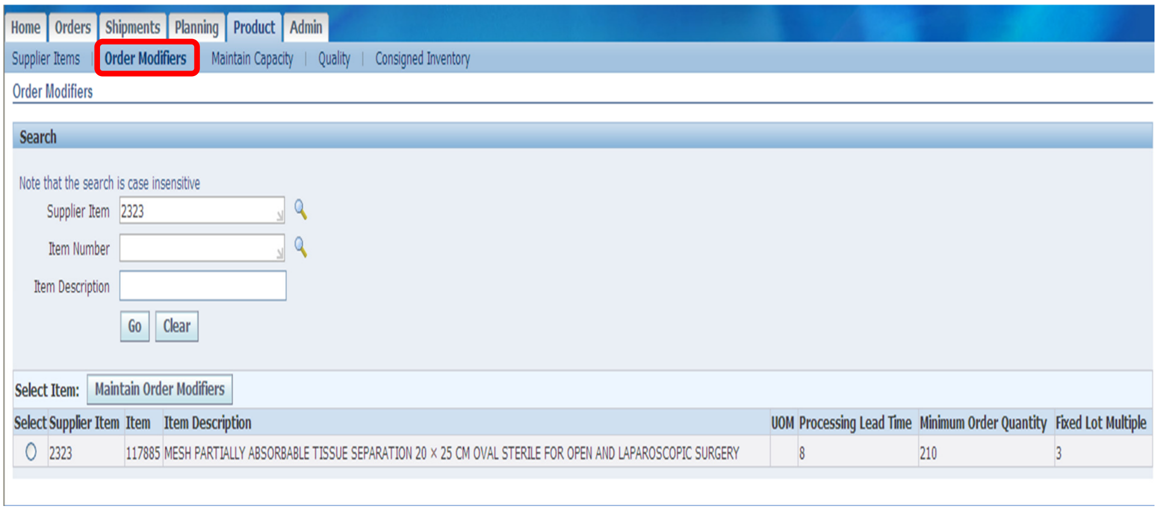
Vendor Managed Inventory

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

Consigned Inventory

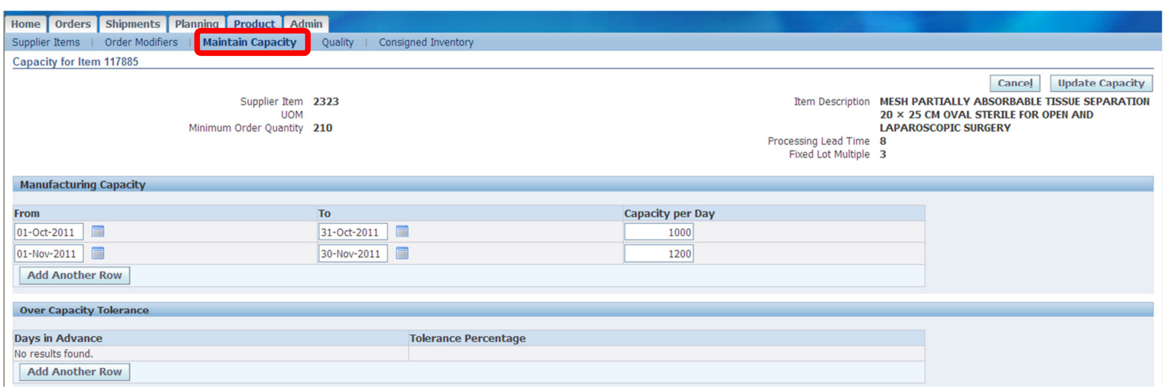
A summary view of consigned items including item, shipment, and transaction information.

- **Order Modifiers**



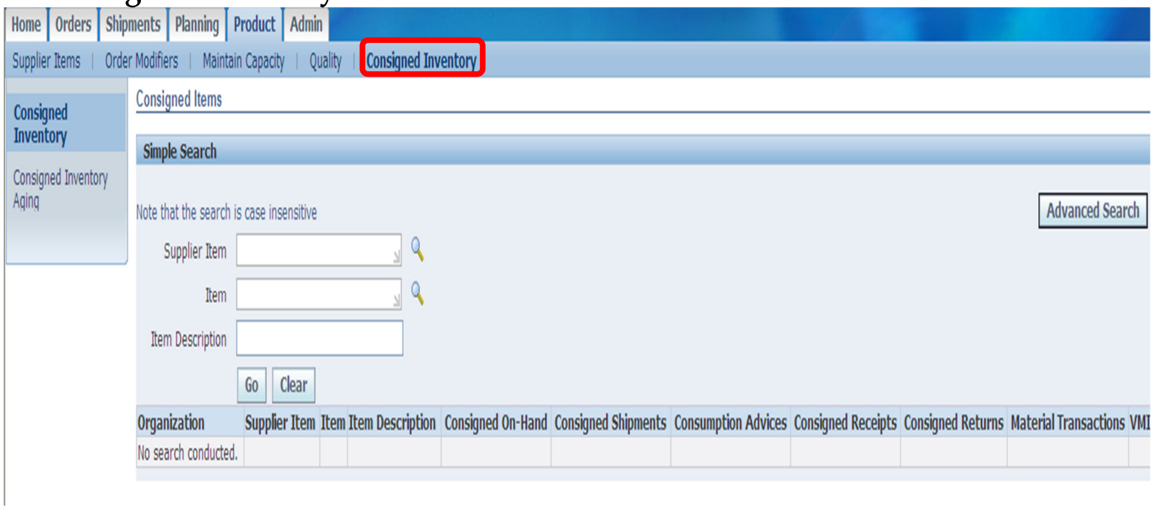
Maintaining order modifiers enables you to view and make changes to the details of your ability to fulfill purchase orders scheduled for delivery. You can view shipment processing lead times, minimum order quantities, and fixed lot multiples. You can then adjust these to fit your delivery ability.

- **Maintain Capacity**



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.

- **Consigned Inventory**

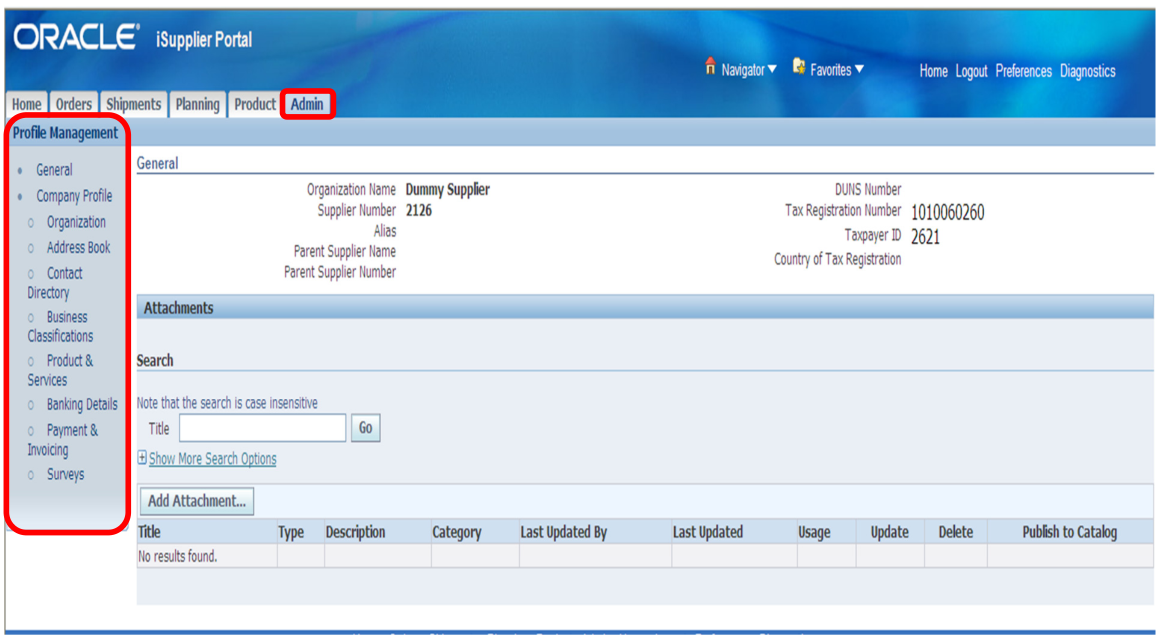


Consignment Inventory is inventory that is in the possession of the customer, but is still owned by the supplier. In other words, the supplier places some of his inventory in his customer's possession (in their store or warehouse) and allows them to sell or consume directly from his stock. The customer purchases the inventory only after he has resold or consumed it. The key benefit to the customer should be obvious; he does not have to tie up his capital in inventory. This does not mean that there are no inventory carrying costs for the customer; he does still incur costs related to storing and managing the inventory.

[redacted]

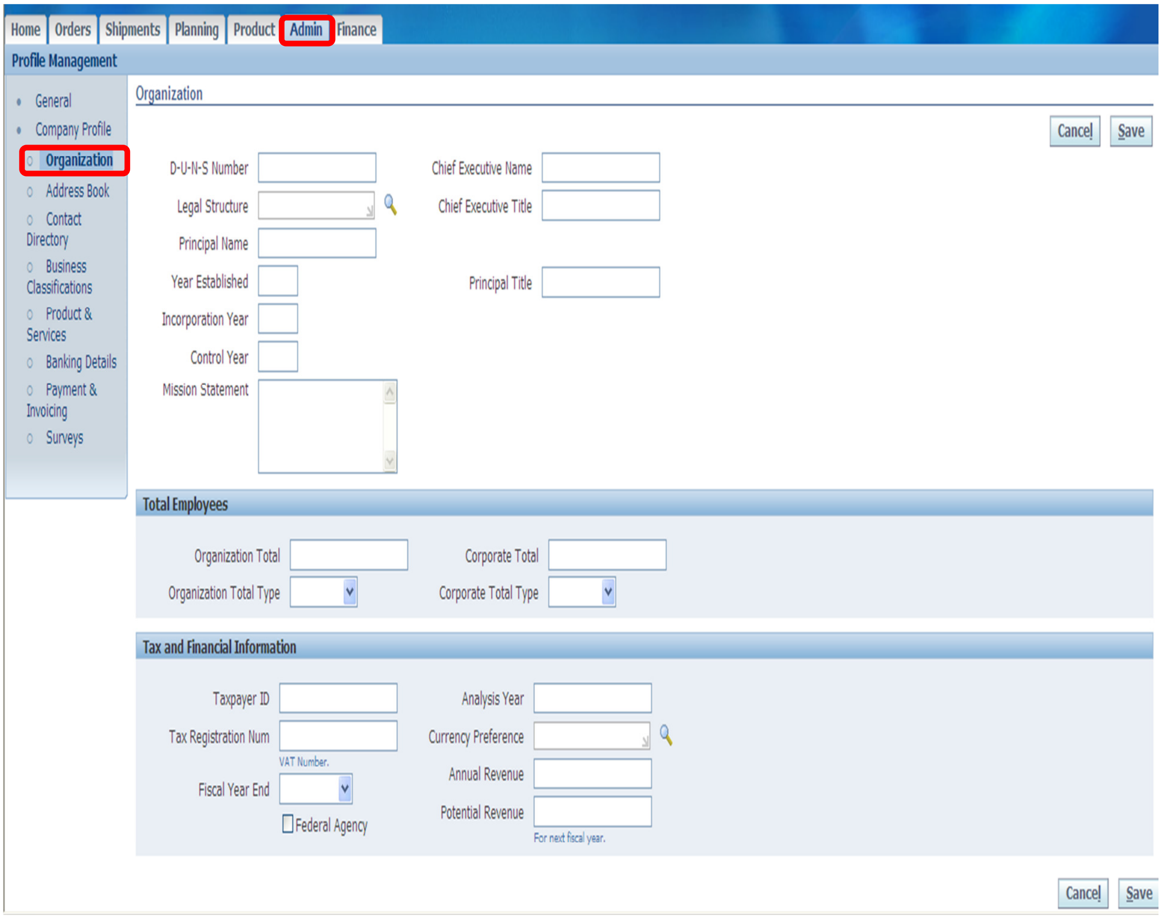
iSupplier Portal Admin Tab

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.



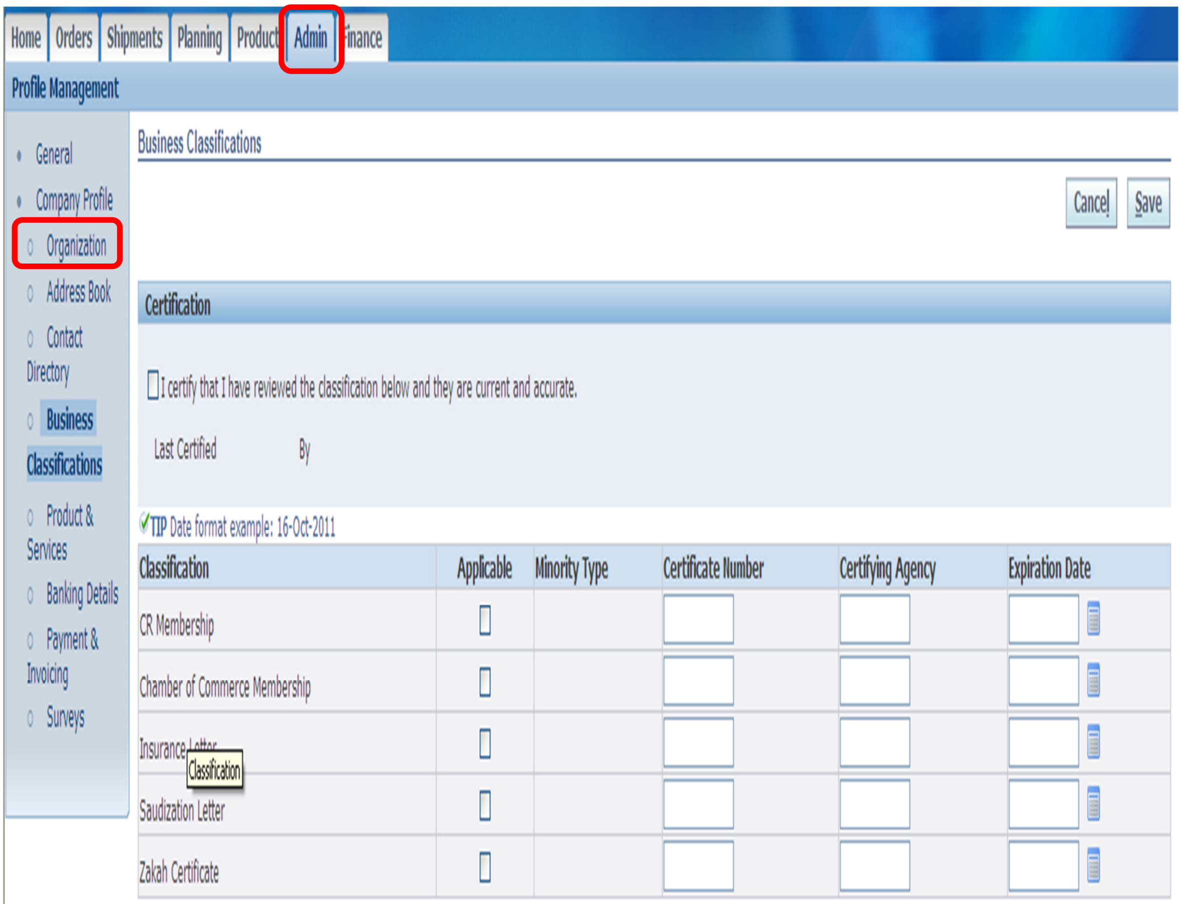
Organization

The **"Organization"** page helps 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 such as Total Employees, Tax and Financial Information.



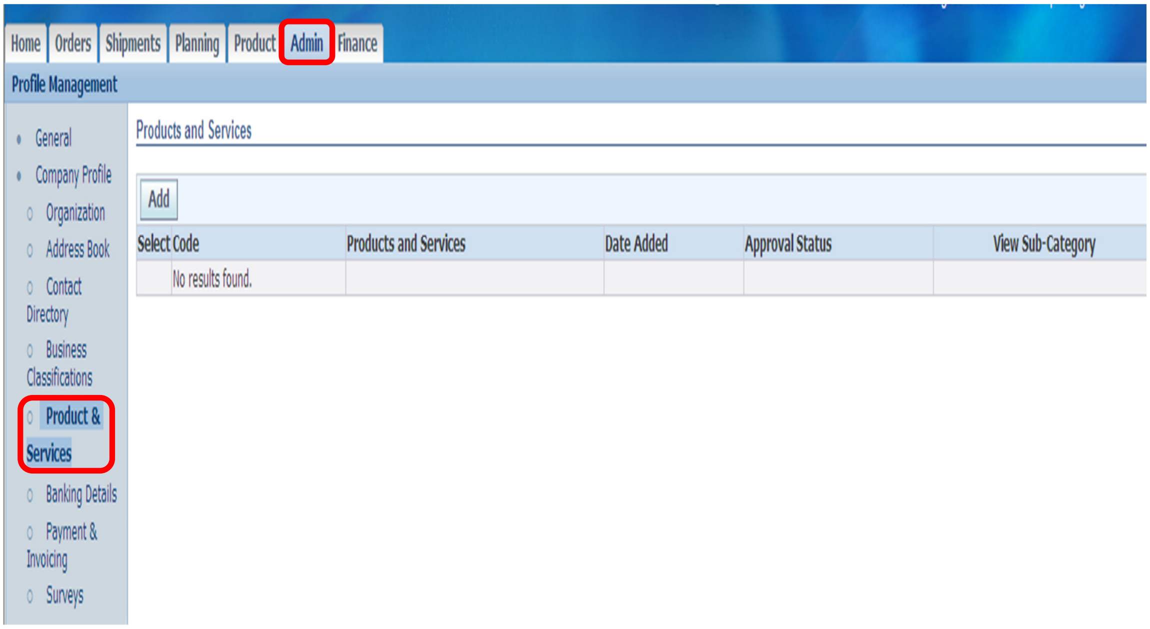
Business Classifications:-

Business classifications are used to identify attributes associated with the suppliers. It is also used to track documents that suppliers are required to provide to NGHA. Buying companies establish a list of business classifications they want to use to classify their supply base.



Products & Services

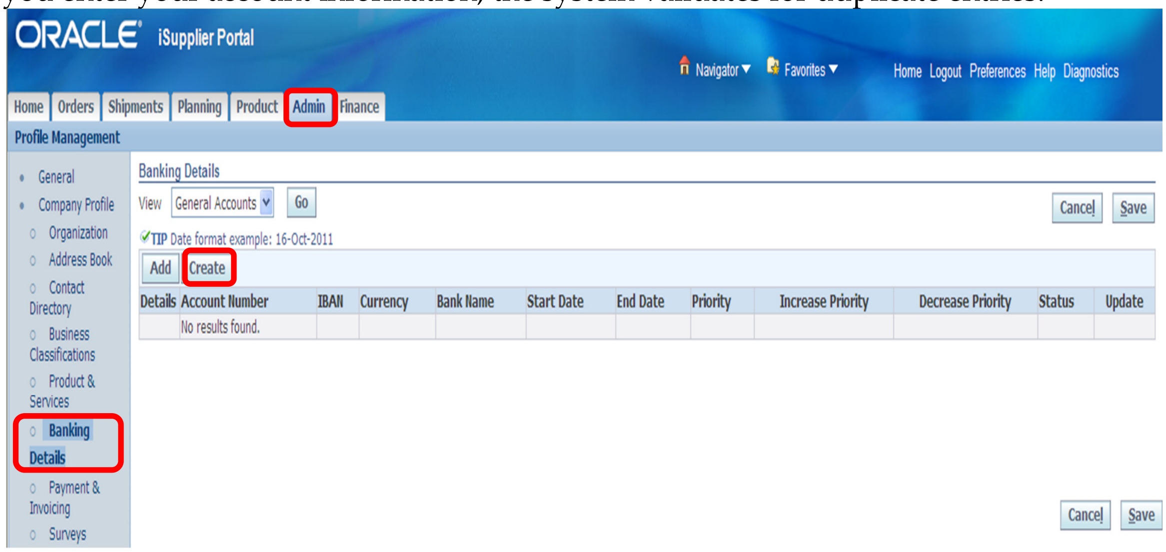
Buying companies define product and service category sets that they use to categorize their supply base. You can browse the list of goods and services and select all those that apply to your business. Buying companies can then use this information; some may use it to help generate supplier invitation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



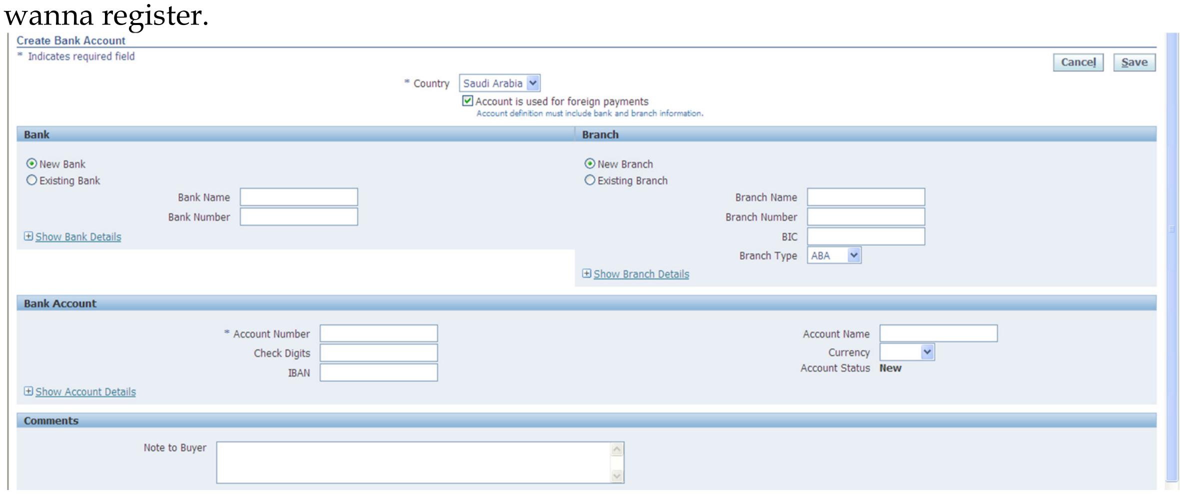
Banking Details

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.



Once we select "**Create**" than we need to enter information of the Bank which we wanna register.



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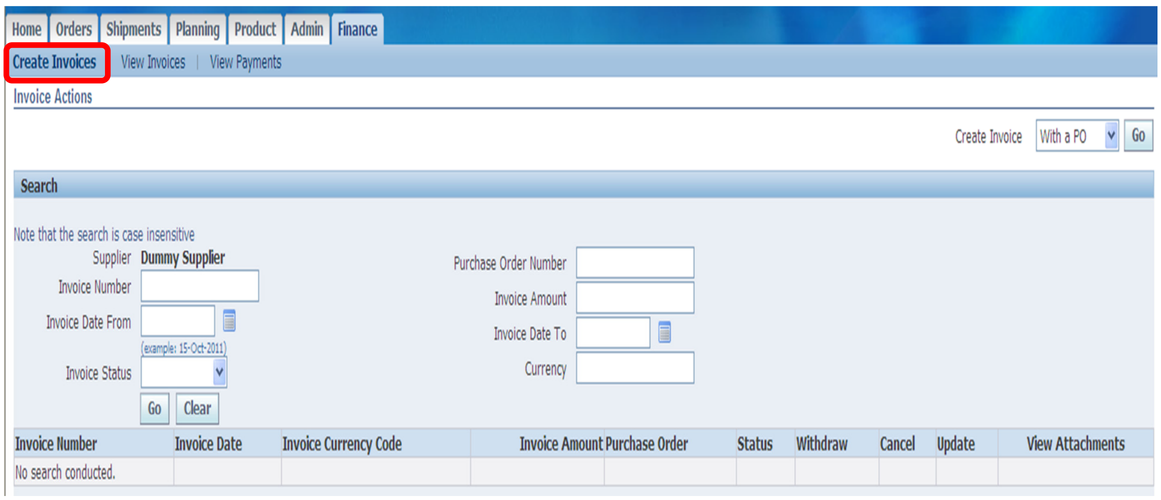
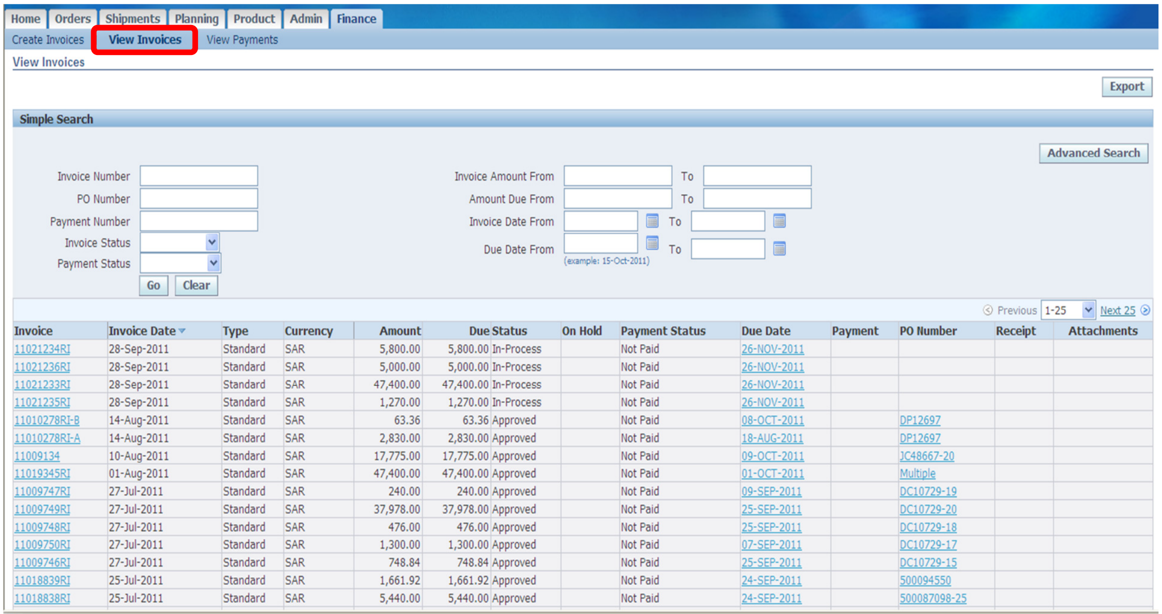
iSupplier Portal Finance Tab

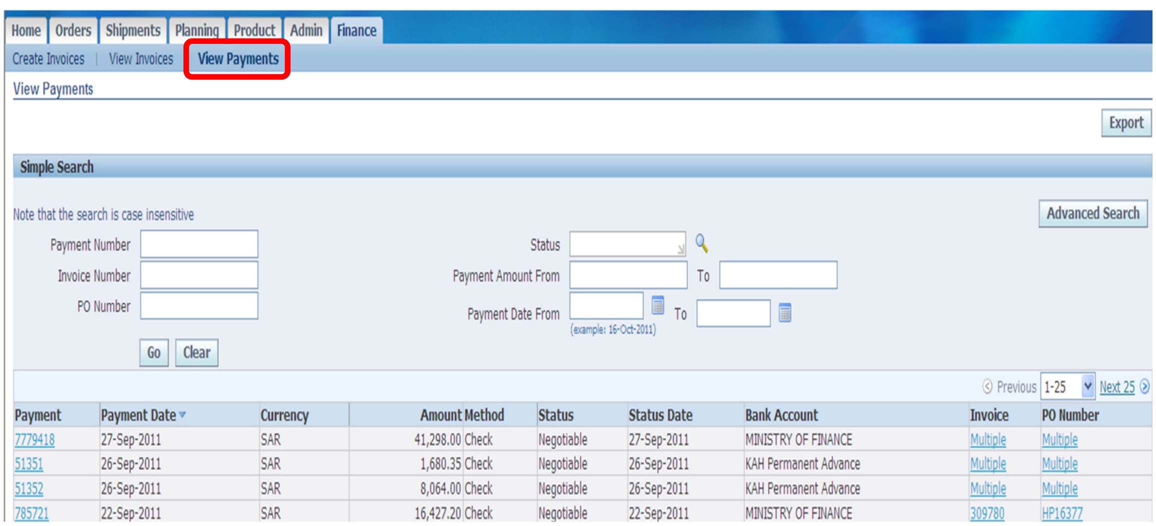
To see the status of Invoice submitted by you, click on '**Fiance Tab'**



- **Create Invoices**
  Supplier 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.



- **View Invoices**
  The View Invoices page enables you to search for and view details of an invoice you have submitted.



- **View Payments**
  Payment inquiry enables you to view the history of all the payments to your invoices completed by the buying company.