

Keys to Launching the iSupplier Portal

Presented to: SCOUG

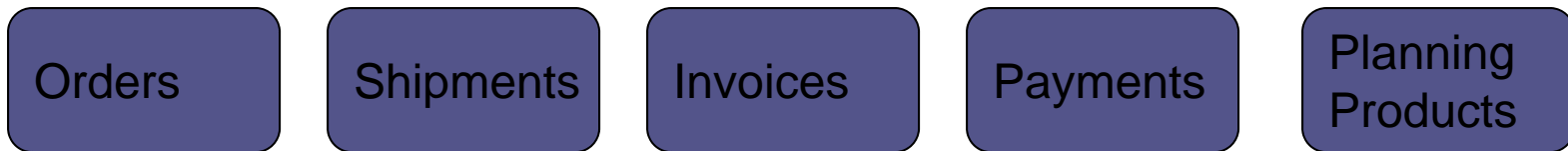
September 16, 2011



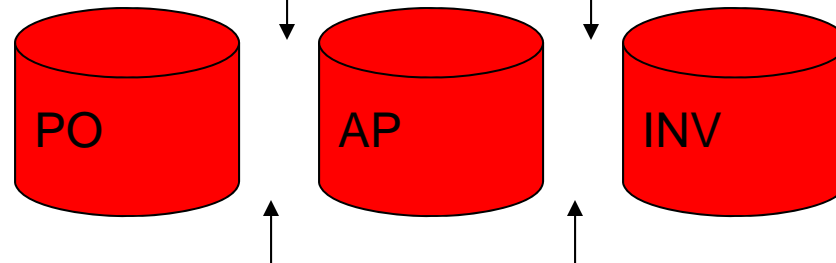
Launching the iSupplier Portal

- Review Application Functionality
 - Inquiry Functions
 - Workflow Notifications
 - Self-Service Transactions
 - Access and Security
- Discuss Elements of the Scope Decision
 - Identify the Supply Base
 - Determine the Functions to Deploy
 - Setup and Maintain Users

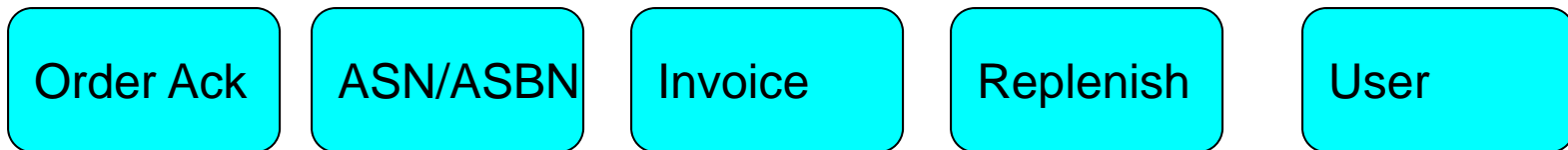
iSupplier Portal Functions



Self-Service **Inquiry** Functions



Self-Service **Transaction** Functions



iSupplier Portal Functions



- Menus/Functions controlled by Responsibility
- Documents controlled by Securing Attributes
- Allow access across Operating Units
- View 'To Supplier' Attachments

Purchase Order Inquiry

ORACLE iSupplier Portal

Home Logout Preferences Help

Home Orders Shipments Planning Finance Product Intelligence Admin

Purchase Orders Work Orders Agreements Purchase History Work Confirmations Deliverables Timecards RFQ

Purchase Orders

Multiple PO Change Export

Views

View All Purchase Orders Go Advanced Search

Select Order: Acknowledge Request Cancellation Request Changes View Change History

| Select PO Number | Rev | Operating Unit | Document Type | Description | Order Date | Buyer | Currency | Amount | Status | Acknowledge By | Attachments |
|-------------------------|-----|----------------|---------------|-------------|----------------------|---------------|----------|--------|----------|----------------|-------------|
| <input type="radio"/> 5 | 0 | ACLLC OU | Standard PO | | 14-Sep-2011 11:04:54 | Marines, Gary | USD | 433.66 | Accepted | | |
| <input type="radio"/> 4 | 0 | ACLLC OU | Standard PO | | 14-Sep-2011 10:59:46 | Marines, Gary | USD | 452.04 | Rejected | | |

- Drill down on Order, Agreements, Releases
- Compare revision history changes
- Work orders, timecards with EAM, OTL
- Request changes, cancellations

Shipments Inquiry

ORACLE iSupplier Portal

Home Logout Prefe

Home Orders Shipments Planning Finance Product Intelligence Admin

Delivery Schedules Shipment Notices Shipment Schedules Receipts Returns Overdue Receipts On-Time Performance Quality

View Receipts

Simple Search

Receipt Number

PO Number

Shipment Number

Shipped Date (example: 14-Sep-2011)

Organization

Item Number

Supplier Item

Item Description

Go Clear

| Receipt | Creation Date | Organization | Shipment | Shipped Date | Packing Slip | Containers | Waybill/ Airbill | Freight Carrier | Bill of Lading | PO Number |
|---------|----------------------|--------------------------------------|----------|--------------|--------------|------------|------------------|-----------------|----------------|--------------------------|
| 4 | 13-Sep-2011 15:40:23 | Cairo Inventory | | | | | | | | Multiple |
| 2 | 08-Sep-2011 14:09:20 | Cairo Inventory | | | | | | | | 7 |
| 17 | 08-Sep-2011 16:56:57 | ACLCC Boat Inventory and Maintenance | | | | | asdfas | | | 8 |

- Access expected deliveries and schedules
- View delivery performance (early, on-time, late)
- View quality performance
- Reconcile return shipments

Planning Functions

Home Orders Shipments **Planning** Finance Product Intelligence Admin

Forecast


Planning Schedule Summary


Simple Search


Note that the search is case insensitive

Schedule Number

Revision

Forecast/Release Type 

Schedule Horizon Start 
(example: 14-Sep-2011)

Schedule Horizon End 
(example: 14-Sep-2011)

| Schedule Number | Creation Revision | Creation Date | Forecast/Release Type | Schedule Horizon Start | Schedule Horizon End | Ship-To Organization | Schedule Status | Schedule Type | Supplier Site |
|----------------------|-------------------|---------------|-----------------------|------------------------|----------------------|----------------------|-----------------|---------------|---------------|
| No search conducted. | | | | | | | | | |

– View Forecasts

Financial Functions

Home | Orders | Shipments | Planning | Finance | Product | Intelligence | Admin

Create Invoices | View Invoices | View Payments

Invoice Actions

Create Invoice With a PO With a PO Without a PO Go

Search

Note that the search is case insensitive

Supplier **Gary Boat Supply**

Invoice Number

Invoice Date From

Invoice Date To

Invoice Status

Purchase Order Number

Invoice Amount

Invoice Date To

Currency

Go Clear

| Invoice Number | Invoice Date | Invoice Currency Code | Invoice Amount | Purchase Order | Status | Withdraw | Cancel | Update | View Attachments |
|----------------------|--------------|-----------------------|----------------|----------------|--------|----------|--------|--------|------------------|
| No search conducted. | | | | | | | | | |

- Create PO related invoices
- Create Non-PO invoices
- View Invoices
- View Payments

Product Inquiry

ORACLE iSupplier Portal

Home Logout Preferences Help

Home Orders Shipments Planning Finance Product Intelligence Admin

Supplier Items | Order Modifiers | Maintain Capacity | Quality | Consigned Inventory

Supplier Items

Simple Search

Note that the search is case insensitive

Supplier Item

Item

Item Description

Go Clear

Advanced Search

| Organization | Supplier Item | Item | Item Description | UOM | Buyer | Orders | Overdue | Receipt History | Defects | Returns | On-Time Performance | Inventory | VMI | Consigned Inventory |
|---------------------|---------------|--------|----------------------------|------|-------------------------------|--------|---------|-----------------|---------|---------|---------------------|-----------|-----|---------------------|
| ACL Item Master Org | GBSW1 | GBS W1 | Gary Boat Supply Widget 1 | Each | Marines, Gary | | | | | | | | | |
| ACL Item Master Org | | 22236 | Busing, Fulcrum Arm Roller | Each | Marines, Gary | | | | | | | | | |

- View Approval Supplier List Entries
- View Consigned/View and Replenish VMI
- View Order Modifiers and Quality Plans
- Maintain Capacity

Intelligence

The screenshot displays the Oracle iSupplier Portal interface. At the top, there is a navigation menu with tabs for Home, Orders, Shipments, Planning, Finance, Product, and Intelligence. Below this, the 'Supplier Management' section is active. The page shows a table of 'Supplier Management KPIs' with columns for Name, Rolling 7 Days, and Change. The data in the table is as follows:

| Name | Rolling 7 Days | Change |
|---|----------------|--------|
| PO Purchases Amount | N/A | N/A |
| Price Change Amount | N/A | N/A |
| Receipt Date Exception Amount Rate | N/A | N/A |
| Receipt Date Exceptions Transactions Rate | N/A | N/A |
| PO Match Invoice Amount | N/A | N/A |
| Manual Invoices Rate | N/A | N/A |
| Return Amount | N/A | N/A |
| Return Transactions | N/A | N/A |

–View KPI's related to the Supplier

–Daily Business Intelligence

Administration

Home Logout Preferences Help

Home Orders Shipments Planning Finance Product Intelligence Admin

Profile Management

- General
- Company Profile
 - Organization
 - Address Book
 - Contact Directory
- Business**
 - Classifications**
 - Product & Services
 - Banking Details
 - Payment & Invoicing
 - Surveys

Business Classifications

Cancel Save

Certification

I certify that I have reviewed the classification below and they are current and accurate.

Last Certified By

TIP Date format example: 14-Sep-2011

| Classification | Applicable | Minority Type | Certificate Number | Certifying Agency | Expiration Date |
|--------------------------------|--------------------------|----------------------|----------------------|----------------------|----------------------|
| Hub Zone | <input type="checkbox"/> | | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Minority Owned | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Service-disabled Veteran Owned | <input type="checkbox"/> | | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Small Business | <input type="checkbox"/> | | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Veteran Owned | <input type="checkbox"/> | | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Women Owned | <input type="checkbox"/> | | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Cancel Save

- Manage supplier profile
- Bank details
- Manage contacts and additional users (separate responsibility)

Self-Service Transactions

- Purchase Order Acknowledgement
 - Acknowledgement flag in Terms window
 - Sends order required notification
 - Provides an accept or reject action
 - Updates order with notification response
- Purchase Order Change Order
 - Request qty, date, price, part#, order#
 - Sends request to buyer for approval
 - Approval updates order with changes
 - Control access through Personalizations

Self-Service Transactions

Supplier Change Order


Buyer Auto-Acceptance Tolerances

| Attribute | Measure | Maximum Increment | Maximum Decrement |
|-------------------|---------|-------------------|-------------------|
| Document Amount | % | 0 | 0 |
| Document Amount | USD | 0.00 | 0.00 |
| Unit Price | % | 0 | 0 |
| Line Amount | % | 0 | 0 |
| Line Amount | USD | 0.00 | 0.00 |
| Schedule Quantity | % | 0 | 0 |
| Schedule Amount | % | 0 | 0 |
| Schedule Amount | USD | 0.00 | 0.00 |
| Pay Item Quantity | % | 0 | 0 |
| Pay Item Amount | % | 0 | 0 |
| Pay Item Amount | USD | 0.00 | 0.00 |
| Promised Date | Days | 0 | 0 |

Routing

Select any of the following attributes for which supplier change request should be routed to requester for approval.

- Promised Date
- Schedule Quantity
- Price (for lines from a non-catalog requisition)



-Automate supplier change requests with tolerances

-Send notifications to requesters

Self-Service Transactions

| Acceptance of Agreement Changes | |
|---------------------------------|---|
| From Supplier | <input checked="" type="radio"/> Always <input type="radio"/> Never <input type="radio"/> When Price Changes Exceed Tolerance |
| From Catalog Administrator | <input type="radio"/> Always <input checked="" type="radio"/> Never <input type="radio"/> When Price Changes Exceed Tolerance |

- Automate supplier agreement change requests based on your choices
- Impacts catalog management

Self-Service Transactions

Home > Orders > Shipments > Planning > Finance > Product > Intelligence > Admin

Home >
Update Blanket Purchase Agreement 5, Rev 2
* Indicates required field

Cancel Actions View PDF

Search

Header Lines Controls

Operating Unit **ACLTS OU** Status **Approved** Currency **USD**

Add Lines: Via Upload Go

| *Line | *Type | Item/Job | Description | *Category | Unit | Price Expiration Date | Actions |
|-------|-------|----------|-------------------------------|---------------------|------|-----------------------|---------|
| 1 | Goods | GBS W1 | Gary Boat Supply Widget 1 | ENGINES-MISC | Each | 23 | |
| 2 | Goods | GBS W2 | Gary Boat Supply Widget 2 | ENGINE REPAIR_BOAT | Each | 670 | |
| 3 | Goods | GBS W3 | Gary Boat Service Widget 3 | WINCHES-MANUAL | Each | 112 | |
| 4 | Goods | 22228 | Roller, Cam, Fulcrum Arm | FUEL-PUMPS | Each | 61.42 | |
| 5 | Goods | 22236 | Busing, Fulcrum Arm Roller | CAMSHAFTS-ALCO-MISC | Each | 61.42 | |
| 6 | Goods | SHPRGS | Shop Rags | MISC | Each | 5.5 | |
| 9 | Goods | 22244 | Pin, Fulcrum Arm Roller | FUEL-PUMPS | Each | 83.52 | |
| 10 | Goods | 53520 | Washer, Hardened Flat | MISC | Each | 0.12 | |
| 11 | Goods | 22251 | Pin, Fulcrum Arm | FUEL-PUMPS | Each | 258.99 | |
| 12 | Goods | 20040 | Bushing, Fulcrum Arm Floating | FUEL-PUMPS | Each | 137.67 | |

Add 5 Rows

Add Lines: Via Upload Go

Previous 1-10 Next 10

- Let your suppliers manage catalogs for iProcurement!
- Enable for catalog management in the Buyer Work Center

Self-Service Transactions

- Advance Shipment Notice (Billing Notice)
 - User enters shipment (invoice) info for lines
 - Sends shipment notification to buyer
 - ASN processes shipment in Purchasing
 - ASBN processes invoice in Payables
- Create Invoice
 - User selects shipment lines to invoice
 - Tax, freight, misc charges allowed
 - Credit invoices entered as negative quantities

Key 1 – Determine Scope

- **What value is added to our organization?**
 - Reduce or eliminate inquiries on documents?
 - Improve accuracy of data?
 - Improve timeliness of creating and updating data?
 - Reduce OLT processing through self-service
- **What is the roll-out plan?**
 - Key suppliers in selected commodities?
 - Formal training process?
 - Supplier involved in implementation?
 - Supplier on-boarding initiative? Or Supplier Summit?

Key 2 – Design Responsibilites

The screenshot shows the Oracle Responsibilites configuration page for 'iSupplier Portal Full Access'. The page is divided into several sections:

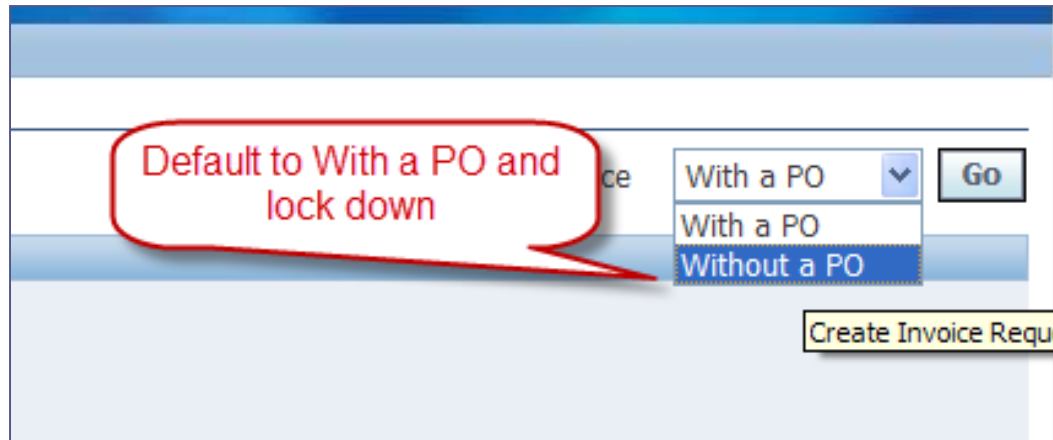
- Responsibility Name:** iSupplier Portal Full Access
- Application:** iSupplier Portal
- Responsibility Key:** ISUPPLIER_PORTAL_RESP
- Description:** iSupplier Portal
- Effective Dates:** From 18-JUN-2001, To (empty)
- Available From:** Radio buttons for Oracle Applications (selected), Oracle Self Service Web Applications, and Oracle Mobile Applications.
- Data Group:** Name Standard, Application iSupplier Portal
- Request Group:** Name (empty), Application (empty)
- Menu:** iSupplier Portal New Application I
- Web Host Name:** (empty)
- Web Agent Name:** (empty)

Below the main configuration area, there are three tabs: Menu Exclusions, Excluded Items, and Securing Attributes. The 'Securing Attributes' tab is selected and highlighted with a red box. Below this tab, there is a table with the following columns: Type, Name, and Description. The table contains one row with the following data:

| Type | Name | Description |
|------|---------------|-------------|
| Menu | iSP Admin Tab | |

- Remove menus, functions for modules you don't use

Key 3 – Personalize Pages



- Determine fields to hide or display
- Control fields updateable on transactions
- Reorder sort criteria
- Change application messages (tips)

Key 4 – User Maintenance Method

- **Supplier Self-Registration**
 - Supplier User self registers via internet link
 - Internal users approve requests
 - Workflow creates user, supplier, and RFQ site
- **Supplier Invitation**
 - Internal user invites supplier
 - Supplier user responds to invite with user info
 - Workflow creates user
- **Supplier Registration**
 - Internal user registers supplier
 - Workflow creates user and notifies supplier
- **User Account Maintenance – Supplier Access**
 - Maintain supplier user information
 - Maintain supplier address information

Key 5 – Some Limitations

- **Transactions are manually entered**
- **Misc & Freight are allocated across all lines**

Other General Keys to Success

- **Involve key supplier(s) in implementation.**
- **Modify Help files for procedures and contacts.**
- **Timely Schedule and Manage interfaces.**
 - **Receipt Transaction Processor**
- **Ask for formal supplier feedback**
- **Review workflows and notifications**
 - **Process improvements**
 - **Inclusion of necessary data elements**
- **Add Logo and color scheme**

iSupplier Benefits

Supplier

- Easy to use
- Consistent user interface
- Real time invoice viewing
- Real time notifications and document transmission

Buyer

- Increased communication with supplier

Payables

- Less manual entry
- Reduced phone calls

Questions?

Thank you

Gary Marines
Consultant
O2Works LLC
Oracle Applications Consulting
Dallas-Chicago-Denver
Main: 972.466.2260
Web: www.o2works.com