

Keys to Launching the iSupplier Portal in R12

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Procurement SIG

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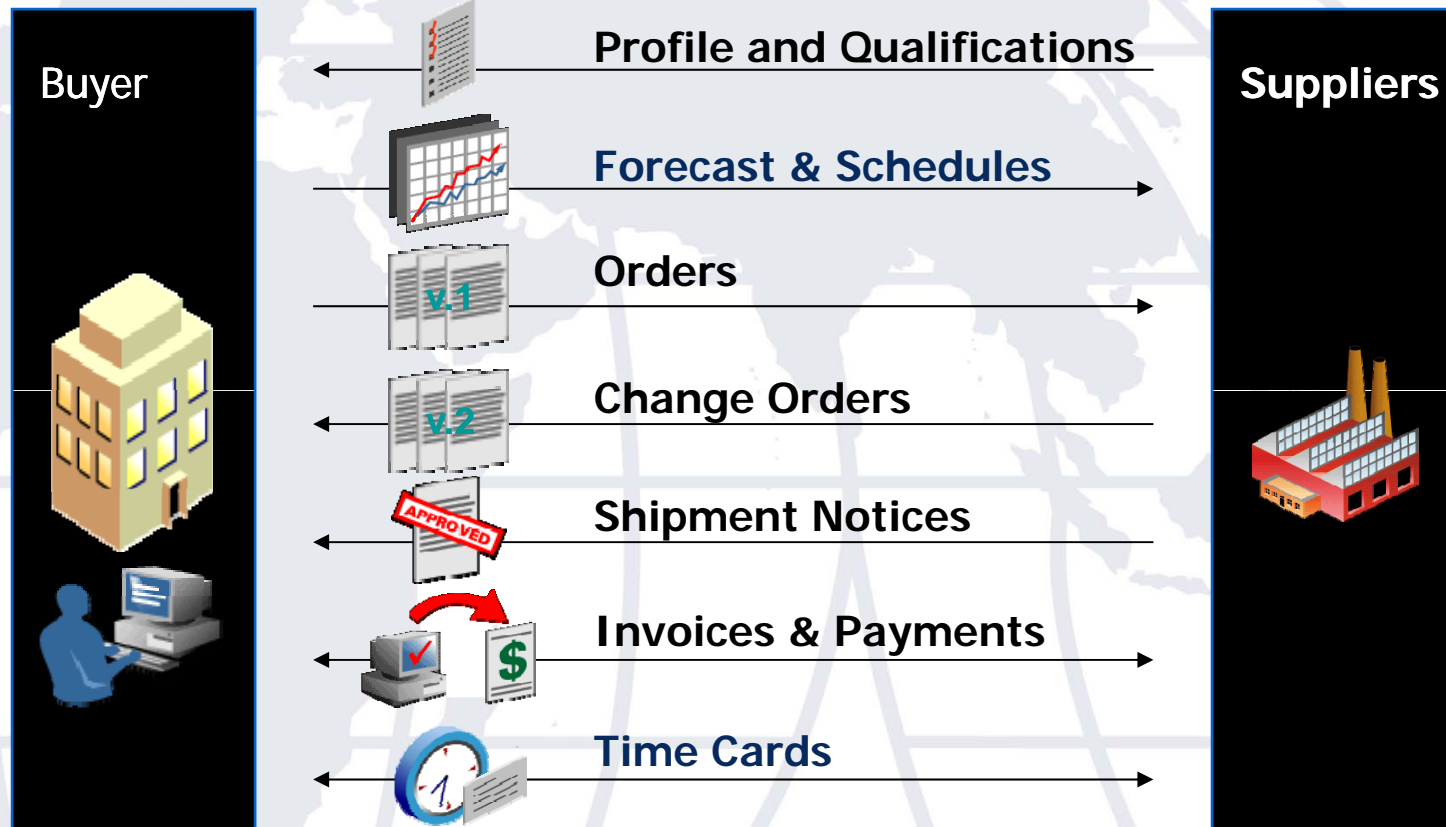
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Agenda

- **Review iSupplier Portal functionality**
- **Discuss keys to a successful launch**
 - Determining scope
 - Designing security
 - Branding the Portal
 - Managing users
 - Personalizing pages
- **Identify key business decisions**
- **Address known limitations of the Portal**



iSupplier Portal Functions



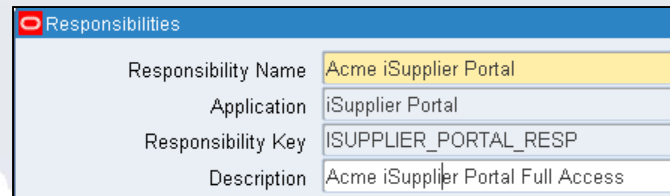
Key 1 - Determine Scope

- **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?
 - Supplier involved in implementation?
 - Formal training process?
 - Future on-boarding, summits?



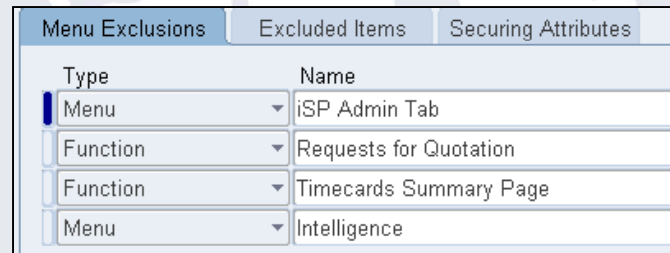
Key 2 - Design Security

- Menus and functions controlled by Responsibility



Responsibilities	
Responsibility Name	Acme iSupplier Portal
Application	iSupplier Portal
Responsibility Key	ISUPPLIER_PORTAL_RESP
Description	Acme iSupplier Portal Full Access

- Use the standard menu structure



Menu Exclusions	
Type	Name
Menu	iSP Admin Tab
Function	Requests for Quotation
Function	Timecards Summary Page
Menu	Intelligence

- Exclude features based on scope



Key 2 - Design Security

- Access to data controlled by Securing Attributes

Name	Application
ICX_SUPPLIER_CONTACT_ID	iSupplier Portal
ICX_SUPPLIER_ORG_ID	iSupplier Portal
ICX_SUPPLIER_SITE_ID	iSupplier Portal

- Portal allows access across Operating Units
- Portal allows viewing of 'To Supplier' Attachments
- Determine default responsibilities for new users
- Assign Internal iSupplier Portal View for support



Key 3 – Brand the Portal

- Choose the domain name for the external server
 - i.e. *isuppliercompany.com* or *companyprocurement.com*
- Personalization the login page *
 - Backup and replace FNDSSCORP.gif with a corporate logo
 - Replace Global and People images, set the Privacy and Copyright
- Others
 - Set the Default Enterprise Name to *Your Company*
 - Update the Workflow Mailer name to identify your company *
 - Update help text with corporate information
 - Rename the iSupplier Portal function user display name

Function	User Function Name
POS_ISP_BRAND	Your Acme Portal

Your Acme Portal



* *change applies to all internal/external users*

Key 4 – User Management

- Determine the user maintenance method
 - **Register:** you create user, supplier is notified.
 - **Invite:** you invite user, supplier completes, you approve.
 - **Self-Registration:** public link for new suppliers.
- Update messages used in user workflows
- Use login assistance functions - forgot name, pword
- Develop an external user access review process
 - Include sites, contacts, parent/child relationships
 - Include users with no valid assigned responsibilities



Key 5 – Personalize Pages

- Review all key transaction and search result pages
 - Determine fields to hide or display
 - Re-order sort criteria
 - Add or change application tips
 - Determine optional fields that should be required
- Some common personalizations
 - Display the Bill Only and GBA flags in PO Summary
 - Display the description and discount in Invoice summary
 - Hide additional ASN/ASBN data entry fields
 - Require person info fields in user registration



Key 6 – Business Decisions

- Require Order Acknowledgements?
 - Supplier user must accept/reject prior to changing
- Supplier Change Orders
 - Set appropriate buyer auto-accept tolerances
 - Set appropriate requestor routing approval rules
 - Use blankets for based supplier catalog management
- Consignment Inventory
 - Use Pay on Use, iSupplier Invoice, *or other?*
 - Determine solution for consigned aging transactions



Key 6 – Business Decisions

- Self-Service Invoicing
 - Do we allow non-matched invoices?
 - Do we allow invoice backdating?
 - Do we allow decrease/increase in unit price?
 - Use APINV workflow for freight, misc, and tax lines.
 - Determine solution for tax code defaulting
- Supplier Profile Management
 - Do we allow site, contact, bank, class, products updates?
 - Set notification subscriptions to appropriate users.



Other Topics

- Transactions are manually entered
 - Be prepared for B2B questions from your supply base
- Transactions use workflows & interfaces
 - Schedule interfaces according to business needs
 - Develop effective error resolution steps
- Project Roll-out Plan
 - Initially deploy to key suppliers
 - Receive formal feedback (60-90 day supplier summit)
 - Formal on-boarding for additional suppliers
 - Integrate new supplier registration



Thank You!

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