



COLLABORATE17

TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

Advanced Procurement at UL: Services Procurement, iSupplier Portal, and Sourcing

Procure to Pay (P2P) Session 1 of 5

Prepared by: Robert Cady, Underwriters Laboratories Inc.
Gary Marines, O2Works



@BobandGaryOAUG

Session ID: 10204

(IOUG) OAUG Quest

#C17LV

About the Presenters

Bob Cady

- IT Business Analyst
- Experience: 9 years UL IT, 21 years Oracle EBS
- Focus on procure to pay and supply chain
- LinkedIn:
<https://www.linkedin.com/in/bobcady>

Gary Marines

- Procure to pay consultant with O2Works, LLC.
- 19 years procurement process and application experience within safety science, telecom, transportation, retail, and energy utility industries
- Contact information:
 - gmarines@o2works.com
- www.o2works.com



Overview of UL

Who are we?



- UL is a global independent safety science company since 1894, working in more than 143 markets around the world.
- UL fosters safe living and working conditions for people everywhere through the application of science to solve safety, security and sustainability challenges. The UL Mark engenders trust enabling the safe adoption of innovative new products and technologies. Everyone at UL shares a passion to make the world a safer place. We test, inspect, audit, certify, validate, verify, advise and train and we support these efforts with software solutions for safety and sustainability.
- UL mark appears on more than 22 Billion products globally.

Introduction to the Exploration Series

- Since 2011 the Special Interest Groups have collaborated on joint presentations focused on a single threaded topic to allow conference attendees to participate in end-to-end business scenarios designed to stimulate conversation and educate end users.
- The Exploration Series is sponsored and supported by the OAUG:
- Special thanks to:
 - Mohan Iyer(mohan.iyer@jadeglobal.com) of the General Ledger Special Interest Group
 - Karen Brownfield (karen.brownfield@infosemantics.com) of the OAUG Board of Directors
- **If there is a specific topic or area you'd like to see covered, please reach out to your SIG or chapter lead with ideas for future sessions**

P2P Exploration Series

All Sessions Wednesday in Breakers G

Session ID	Time	Title	Presenter
10204	9:45 – 10:45	Advanced Procurement at UL: Services Procurement, iSupplier Portal, and Sourcing	Robert Cady Underwriters Laboratories Inc. Gary Marines, O2Works
10248	11:00 – 12:00	Best Practices P2P: Centralized Invoice and Payment Processing with Reconciliation	Ravikanth Prabhu Broadridge Financial Solutions
10333	1:30 – 2:30	Implementing Automated Clearing House (ACH) Payment Functionality	Matt Caradine, M&S Consulting Shruit Karat, Consultant Noelle Widdowson, ModCloth
10392	2:45 – 3:45	Transform Payment Processing with Centralization, Automation and Straight-Through Processing	Alyssa Johnson Keste
10113	4:15 – 5:15	Why Won't My Cash Reconcile? Basics of Reconciliation Revealed	Mandar Kulkarni Hyatt Corporation

Agenda

- Overview of UL
- Case for Change and Prior State
- Future State
- Advanced Procurement
- Roll out considerations
- Next steps
- Questions and answers



Case for Change and Prior State

Case for Change and Prior State

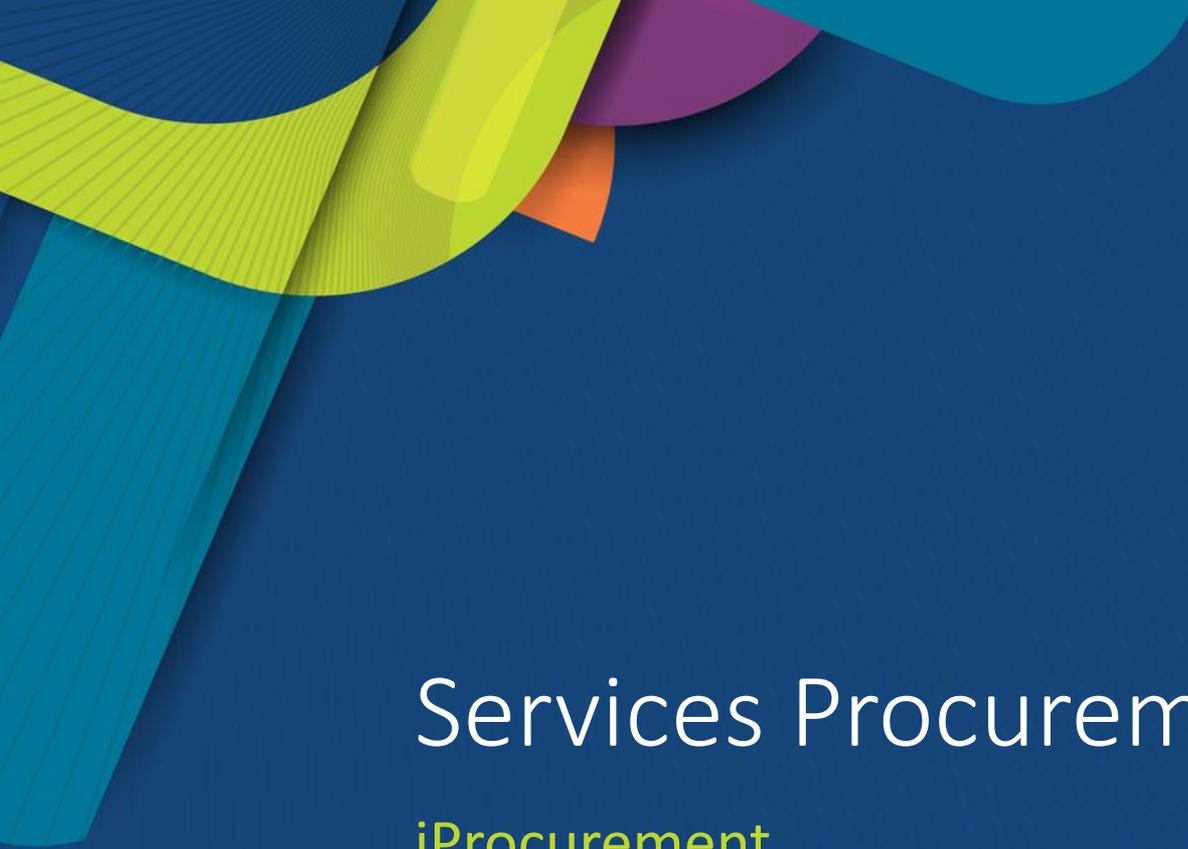
- Increase procurement maturity level
 - AP processes were manual and cumbersome
 - Invoices emailed/mailed into Payables group
 - Invoices scanned and matched to Purchase orders manually
- Increase communication with Suppliers
 - Suppliers had to call Payables group or Sourcing group to find out status of purchase orders, invoices and payments
- Increase the procurement and management of services.
 - Users created “buckets” of money rather than hours per resource. Difficult to know how to match hours used to the value of the service.

Case for Change and Prior State

- Contingent worker information was passed through Human Resources, but the end user had no access to the information.
- Sourcing events were not captured in a source system. Many different formats and processes used to generated sourcing activities. Email is the primary method of communicating back and for the during the sourcing period.

Future State

- Utilize some of Oracle's Advanced Procurement options to increase efficiencies!
 - **Services Procurement** – Generate requests for contingent labor from pre-identified vendors when possible.
 - **iSupplier portal** – Used to communicate all aspects of the process. Contingent worker needs, purchase orders, timecard/receipt information and payment information.
 - **Oracle Sourcing** – Used to create, document, and execute events to support long term procurement needs.

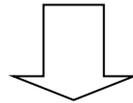


Services Procurement

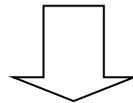
iProcurement

Services Procurement

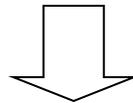
Requisition



Purchase Order



Create Contractor Assignment



Timecard Process

Services Procurement - iProcurement

CONTRACTORS TAB



You will find that there is a new tab labeled Contractors and that there is a new sub-menu labeled Contractor Request.

Services Procurement - iProcurement

From the Contractors Tab you can:

- Create Contractor Request
- View Contractor Performance (enter performance)
- Use the View to view past contractors or ones pending assignment.
- View entered timecards

The screenshot displays the Oracle iProcurement interface for the Contractors tab. The navigation bar includes 'Shop', 'Requisitions', 'Receiving', 'Contractors', and 'Assessments'. The 'Contractors' tab is active, showing a search bar and two buttons: 'Create Contractor Request' and 'View Contractor Performance'. Below the search bar is a 'Views' section with a dropdown menu set to 'Active Contractors' and a 'Go' button. The main content area is a table with the following data:

Name	Job Description	Requisition	Start Date	End Date	Purchase Order	Supplier	PO Amount Billed (USD)	PO Amount Remaining (USD)	View Timecard
Contractor	Contractor	88720057574	08-Sep-2016	30-Sep-2016	7202057133	ACME	0.00	4500.00	
Joe Dirt	Contractor	88720057569	07-Sep-2016		7202057120	O2WORKS LLC	40.00	0.00	

At the bottom of the table, there are two buttons: 'Create Contractor Request' and 'View Contractor Performance'.

Services Procurement - iProcurement

Create Contractor Request

ORACLE iProcurement

Shop Requisitions Receiving Contractors Assessments

Stores | Shopping Lists | Non-Catalog Request | Contractor Request

Create Contractor Request

* Indicates required field

* Type ▾

* Job ▾ 🔍

Category

Job Description

Important Require Candidate Screening

* Start Date 📅

End Date 📅

* Requester 🔍

* Location 🔍

[Enter one-time address](#)

Job Details

* Contact Information

Key Considerations:

➤ Require Candidate Screening or Not?

Services Procurement - iProcurement

Edit Contractor Request

The screenshot shows the 'Create Contractor Request' form in the iProcurement system. The form is divided into several sections: 'Supplier Information', 'Rate and Budget Information', and 'Contractor Details'. Callouts provide additional context for various fields.

Supplier Information Section:

- Radio buttons: Use Preferred Suppliers, Suggest Supplier and Contractor. Callout: "Suggest a new supplier" points to the second option.
- Table of suppliers:

Select	Supplier Information	Unit	Rate	Rate Negotiable	Rate Differential	Rate Limit	Suggested Contractor First Name	Suggested Contractor Last Name
<input checked="" type="checkbox"/>	AEROTEK INC Site CHICAGO Contact Phone Email Fax Source Document Number 7202049753 Document Type Contract Purchase Agreement Note to Supplier Add Note						<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	O2WORKS LLC Site DALLAS 2 Contact Phone Email Fax Source Document Number 7202049747 Document Type Contract Purchase Agreement Note to Supplier Add Note						<input type="text"/>	<input type="text"/>

Callouts for the table: "Use preferred suppliers if available" points to the checked checkboxes; "Can also have predefined rates for a particular job - requires a global blanket agreement" points to the Rate fields; "Discussion point - Do you know who you want to hire?" points to the Suggested Contractor Name fields.

Rate and Budget Information Section:

- * Indicates required field
- * Unit: (dropdown)
- Estimated Quantity:
- * Target Rate (USD):
- * Labor Amount (USD): (with 'X' icon)
- Expense Amount (USD):
- Allow Rate Differential

Callout: "Enter target rate, units, and total budget. Also enter an expense amount if needed" points to the Target Rate and Labor Amount fields.

Buttons: Cancel, Back, Add To Cart are present at the top right and bottom right of the form.

Services Procurement - iProcurement

Edit Contractor Request

Edit Contractor Request

Use Preferred Suppliers
 Suggest Supplier and Contractor

Supplier Information

New Supplier

Supplier Name: MANPOWER
Site: CHICAGO

Contact: Mingo, Christopher
Contact Phone:
Contact Email: Christopher.mingo@man
Contact Fax:

Contractor
First Name: Manpower
Last Name: Contractor

Rate and Budget Information

* Indicates required field
* Unit: Hour

Estimated Quantity: 200
* Target Rate (USD): 20
* Labor Amount (USD): 4000.00
Expense Amount (USD): 100.00

Allow Rate Differential

Key Considerations:

➤ Preferred Supplier or Not?

Services Procurement - iProcurement

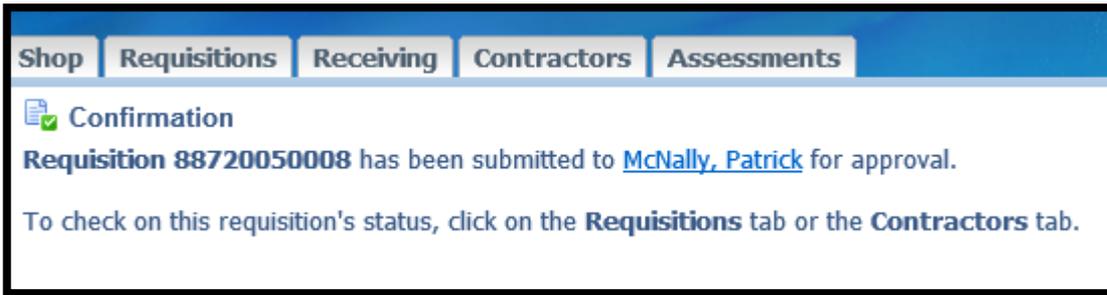
Shopping Cart

Line	Description	Special Info	Contractor Status	Contractor Name	Unit	Rate (USD)	Expense Amount (USD)	Labor Amount (USD)	Total (USD)	Edit	Copy	Delete
1	Contractor		Not Applicable	Manpower Contractor	Hour	20	100.00	4000.00	4100.00			
Total							100.00	4000.00	4100.00			

- If I have a known contractor name, the contractor status will be Not Applicable.
- If the contractor name was not filled out the contractor status will be Pending.

Services Procurement - iProcurement

➤ Create Contractor Request



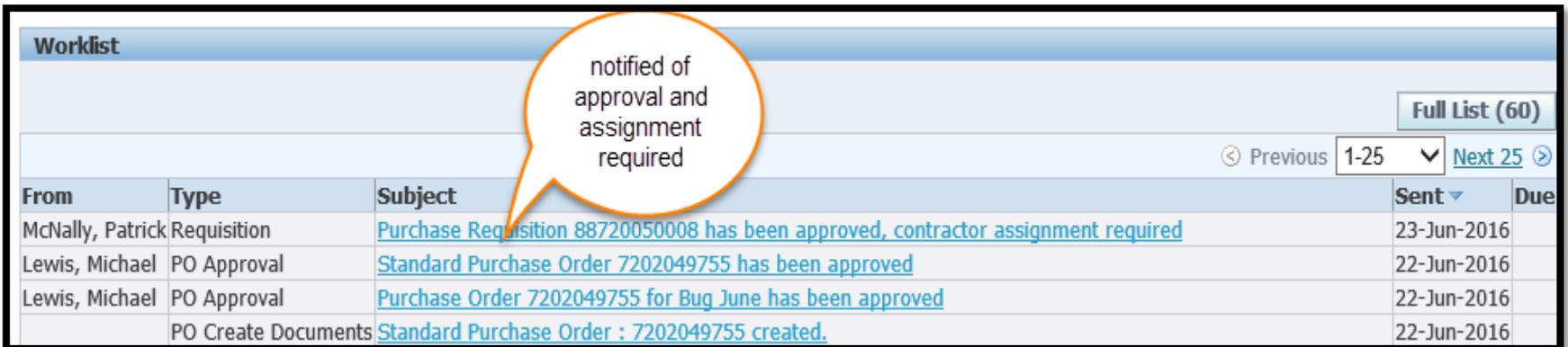
Shop Requisitions Receiving Contractors Assessments

 **Confirmation**

Requisition **88720050008** has been submitted to [McNally, Patrick](#) for approval.

To check on this requisition's status, click on the **Requisitions** tab or the **Contractors** tab.

➤ Requester Notified



Worklist

Full List (60)

Previous 1-25 Next 25

From	Type	Subject	Sent	Due
McNally, Patrick	Requisition	Purchase Requisition 88720050008 has been approved, contractor assignment required	23-Jun-2016	
Lewis, Michael	PO Approval	Standard Purchase Order 7202049755 has been approved	22-Jun-2016	
Lewis, Michael	PO Approval	Purchase Order 7202049755 for Bug June has been approved	22-Jun-2016	
	PO Create Documents	Standard Purchase Order : 7202049755 created.	22-Jun-2016	

notified of approval and assignment required

Services Procurement - iProcurement

➤ If you selected a preferred supplier(s) they are notified

Information
This notification does not require a response.

Request IT Contractor: 30-JUN-16

From **McNally, Patrick** Company Name **Default enterprise name**
To **INSIDE AEROTEK** Requisition / Line **88720050008 / 1**
Sent **23-Jun-2016 11:24:05** Attachments
ID **59428057**

Request Information

Job	Contractor	Start Date	30-Jun-2016
Job Description	IT Contractor	End Date	
Suggested Contractor		Requester	Lewis, Michael
Candidate Screening Required	Yes	Location	2600 N.W. Lake Road, Camas, WA 98607, United States

Job Details **This job will require SharePoint and Microsoft 360 skills.**

Contact Information **Gary Marines - 469-556-7104**

Notes To Supplier

Budget Information

Unit	Hour	Estimated Labor Amount (USD)	10000
Target Rate (USD)	50		
Estimated Quantity (Hour)	200		
Allow Rate Differential	No		

[Return to Worklist](#)

OK Reassign More Information Request

Services Procurement - iProcurement

- After reviewing resumes and interviewing candidates, Assign the Contractor

My Requisitions

Requisition	Description	Total (USD)	Status
88720050008	IT Contractor	10000.00	Approved, Pending

Shop | Requisitions | Receiving | Contractors | Assessments

Requisitions | Notifications | Approvals

Shop: Stores >

Requisition 88720050008

[Copy To Cart](#) [Cancel Requisition](#) [Change](#) [Assign Contractor](#)

Description **IT Contractor**
Created By **Lewis, Michael**
Creation Date **23-Jun-2016 11:11:48**
Justification **New consultant for project**

Status [Approved, Pending](#)
Change History **No**
Urgent Requisition **No**
Attachment **None**
Note to Buyer

Details

Line	Description	Location	Contractor Name	Contractor Status	Unit	Rate	Amount (USD)	Details	Order
1	IT Contractor	United States - Camas		Pending	Hour	50 USD	10000.00		
Total							10000.00		

[Return](#) [Copy To Cart](#) [Cancel Requisition](#) [Change](#) [Assign Contractor](#)

Services Procurement - iProcurement

➤ Create Contractor Assignment

Assign Contractor: Requisition 88720050008, Line 1 (IT Contractor)
* Indicates required field

Supplier

Select Supplier

Select Supplier	Supplier Site	Unit	Rate	Rate Negotiable?	Rate Limit
<input type="radio"/> AEROTEK INC	CHICAGO				
<input checked="" type="radio"/> O2WORKS LLC	DALLAS 2				

Contractor

* Last Name: Susan
First Name: Sales
Attach Resume: None Add...

Schedule

* Start Date: 30-Jun-2016
End Date:

Rate

* Unit: Hour
Estimated Quantity: 200

Type	Minimum Rate Multiplier	Maximum Rate Multiplier	Agreed Rate Multiplier	Agreed Rate (USD)
Standard Rate				50
Holiday Rate				
Overtime Rate				
Standby/On-Call Rate				
Travel Rate				
Weekend Rate				

TIP Agreed Rate for a given rate type is equal to the Standard Rate times the corresponding rate multiplier

Amount

	Amount (USD)
Labor Amount	10000.00
Expense Amount	

Notes

Note To Supplier

pick supplier

enter name

update rate and qty if needed, but it might cause additional approvals

Cancel Apply

Services Procurement - iProcurement

➤ Create Contractor Assignment

Checkout: Review and Submit Requisition

Requisition 88720050008: Total 10000.00 USD

Created By **Lewis, Michael**
Creation Date **23-Jun-2016 11:11:48**
Description **IT Contractor**
Justification **New consultant for project**

Requisition Attachments

Title	Type	Description	Category	Last Updated By	Last Updated
No results found.					

Lines

Details Line	Description	Cost Center	Contractor Status	Unit
<input type="checkbox"/> Hide 1	IT Contractor	51202	Assigned	Hour

Requester **Lewis, Michael**
Start Date **30-Jun-2016**
End Date
Category Description **IT..**
P-Card Used **No**
Contractor Name **Sales Susan** ←
Contractor Status **Assigned**

Job Details **This job will require SharePoint and Microsoft 360 skills.**
Contact Information **Gary Marines - 469-556-7104**

Services Procurement - iProcurement

➤ Create Contractor Assignment

My Requisitions			
Requisition	Description	Amount	Status
88720050008	IT Contractor	10000.00	Approved, Assigned

changed to assigned

Services Procurement - Purchasing

➤ Create PO

Requisitions | Orders | Agreements | Deliverables | Negotiations | Suppliers

Requisitions: Demand Workbench > Update Standard Purchase Order >
Update Line 1 (Standard Purchase Order 7202049756)

Operating Unit **UL LLC** Currency **USD**

* Indicates required field

* Line Type **Rate Based J** Category **IT..**
Job **Contractor** Unit **Hour**
* Description **IT Contractor** * Price **50**
Supplier Item Negotiated **No**
* Amount **10000.00**

Price Differentials

*Num	*Type	*Multiplier	Enabled	Delete
No results found.				

Contractor **Work Details**

First Name **Sales** Location **United States - Camas**
Last Name **Susan** Organization **720**
* Start Date **30-Jun-2016** Requester **Levis, Michael**
End Date

Billing

PO Charge Account **720.66601.00000.51202.750.098.010** Project
Accrue at Receipt **No** Task
Match Approval Level **3-Way** Expenditure Type
Invoice Match Option **PO(1)** Expenditure Org
Invoice Close Tolerance (%) **1** Expenditure Item Date

Source Document

Document **7202049747** Document Style **Contract Purchase Agreement**
Owning OU **UL LLC**

Services Procurement – HR Self Service

- Create Contractor Assignment, follow HR self service person creation

My Notifications

Type	From	Subject
PO Approval	Lewis, Michael	Purchase Order 7202049756 for Sales Susan has been approved

Information
The current responsibility context has been switched to: UL Manager Self-Service, United States

Place Contingent Worker

Enter the details and click Next to check for potential duplicates and place the contingent worker.
* Indicates required field

* Business Group

* Last Name

First Name

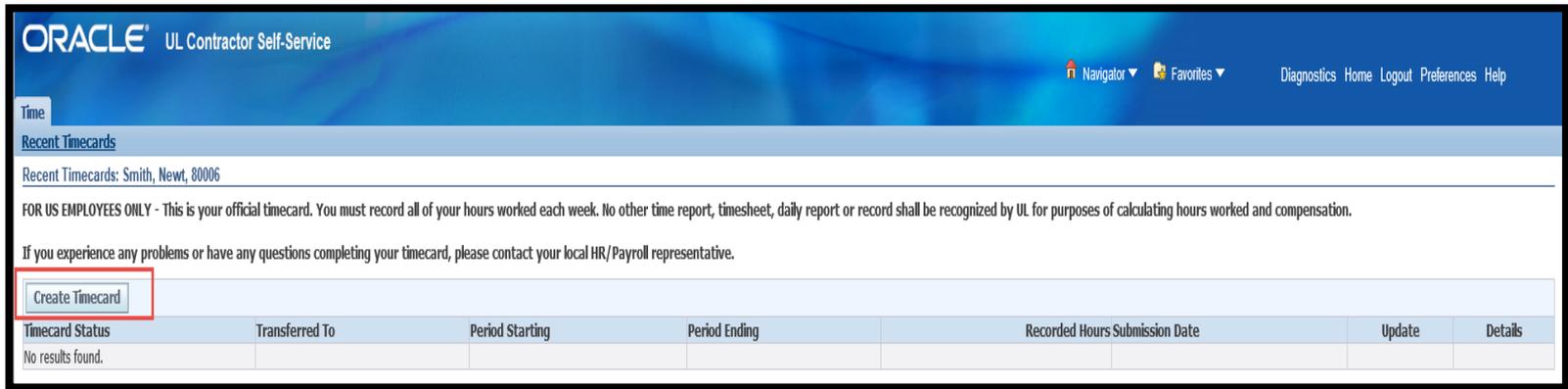
Date of Birth

Social Security

* Start Date

Services Procurement – Timecard Entry

➤ Create Timecard



The screenshot displays the Oracle UL Contractor Self-Service interface. At the top, the Oracle logo and 'UL Contractor Self-Service' are visible. The page includes a navigation bar with 'Navigator', 'Favorites', 'Diagnostics', 'Home', 'Logout', 'Preferences', and 'Help'. Below the navigation bar, the 'Time' section is active, showing 'Recent Timecards' for 'Smith, Newt, 80006'. A message states: 'FOR US EMPLOYEES ONLY - This is your official timecard. You must record all of your hours worked each week. No other time report, timesheet, daily report or record shall be recognized by UL for purposes of calculating hours worked and compensation. If you experience any problems or have any questions completing your timecard, please contact your local HR/Payroll representative.' A 'Create Timecard' button is highlighted with a red box. Below the button is a table with columns: 'Timecard Status', 'Transferred To', 'Period Starting', 'Period Ending', 'Recorded Hours Submission Date', 'Update', and 'Details'. The table content shows 'No results found.'

➤ Key Setup: “Purchasing Timecard Layout” timecard layout for contingent worker in the OTL preference based on person type.

Services Procurement – Timecard Entry

- Create Timecard
- Supervisor approves timecard (becomes receipt)

Time
Recent Timecards
Time Entry: Dirt, Joe, 80000

FOR US EMPLOYEES ONLY - This is your official timecard. You must record all of your hours worked each week. No other time report, timesheet, daily report or record shall be recognized by UL for purposes of calculating hours worked and compensation.
If you experience any problems or have any questions completing your timecard, please contact your local HR/Payroll representative.

Period: September 12, 2016 - September 18, 2016
Template: [] Apply Template

Comments: It was a good two day work week

PO	Line	Type	Mon, Sep 12	Tue, Sep 13	Wed, Sep 14	Thu, Sep 15	Fri, Sep 16	Sat, Sep 17	Sun, Sep 18	Total	Delete
720205712	1	Standard Rate	4	4						0	
										0	
										0	
Add Another Row Recalculate			0	0	0	0	0	0	0	0	

Services Procurement – Timecard Entry

➤ Import Timecard into Purchasing

The screenshot displays the Oracle Purchasing interface. At the top, a 'Submit Request' dialog box is open, showing the following details:

- Run this Request... (with a 'Copy...' button)
- Name: Retrieve Time from OTL
- Operating Unit: (empty)
- Parameters: O2WORKS LLC:::
- Language: American English
- Buttons: Language Settings..., Debug Options

Below the dialog box, the Oracle Purchasing navigation bar is visible, with tabs for Requisitions, Orders, Agreements, Deliverables, Negotiations, and Suppliers. The current view is 'Orders > Standard Purchase Order > Line > Purchasing: Timecard Summary >'. The page title is 'Timecard Details for Period 23-Jun-2016 to 26-Jun-2016'.

PO	Line	Rate Type	23-Jun-2016
7202049756	1	Standard Rate	5

Advanced Procurement – ERS

➤ Evaluated Receipt Settlement or Pay on Receipt

Submit Request

Run this Request...

Copy...

Name: Pay On Receipt AutoInvoice

Operating Unit: UL LLC

Parameters: :1::0:No

Language: American English

Language Settings... Debug Options

Payables Open Interface Import Report

Report Date: 23-JUN-2016 16:19
Page: 1

Source Name: ERS
Group: ERS-20714359
Batch Name: RECEIPTS/23-JUN-16/16324232

Hold Name:
Hold Reason:
GL Date:
Purge: No
Summarize Report N

UL LLC

Payables Open Interface Audit Report

Supplier Number	Supplier Name	Invoice Number	Invoice Date	Invoice Currency	Invoice Amount	Line Number	Invoice Line Accounting Amount	Invoice Line Accounting Date
17685	O2WORKS LLC	ERS-23-JUN-16-41	23-JUN-16	USD	250.00	1	250.00	23-JUN-16
Total Invoices Imported:					1			
Total Functional Currency Invoice Amount:					250.00			

Report Date: 23-JUN-2016 16:19
Page: 2

Source Name: ERS
Group: ERS-20714359
Batch Name: RECEIPTS/23-JUN-16/16324232

Hold Name:
Hold Reason:
GL Date:
Purge: No
Summarize Report N

Services Procurement - iProcurement

Key Setup Profiles

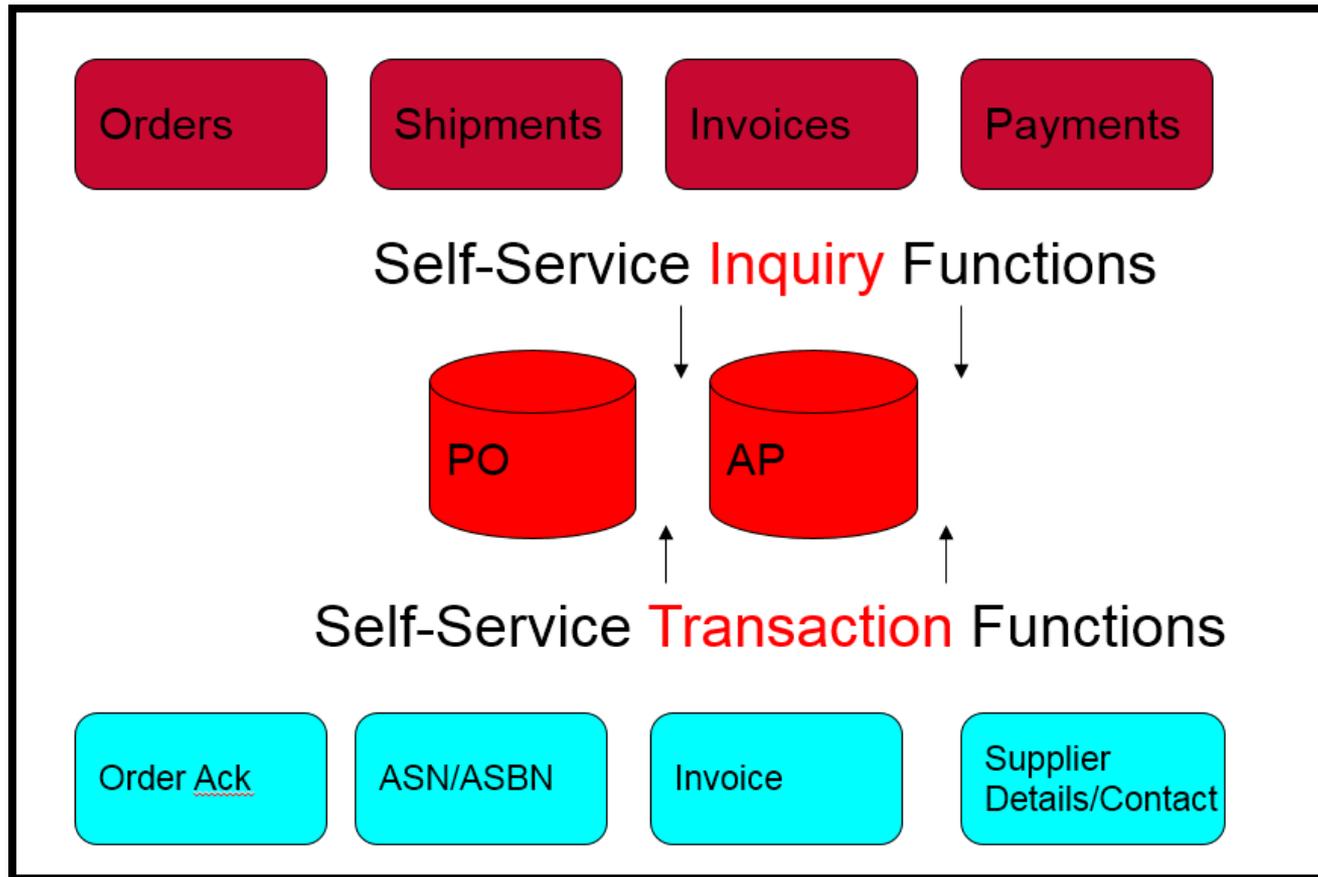
- Set PO: Enable Services Procurement to Yes
- Set POR : Rate Based Services Line Type to your Service line type
- Set POR: Contractor Expense Line Type to your Fixed Price line type



iSupplier Portal

Advanced Procurement – iSupplier Portal

➤ Increase Communication and Self-Service Features



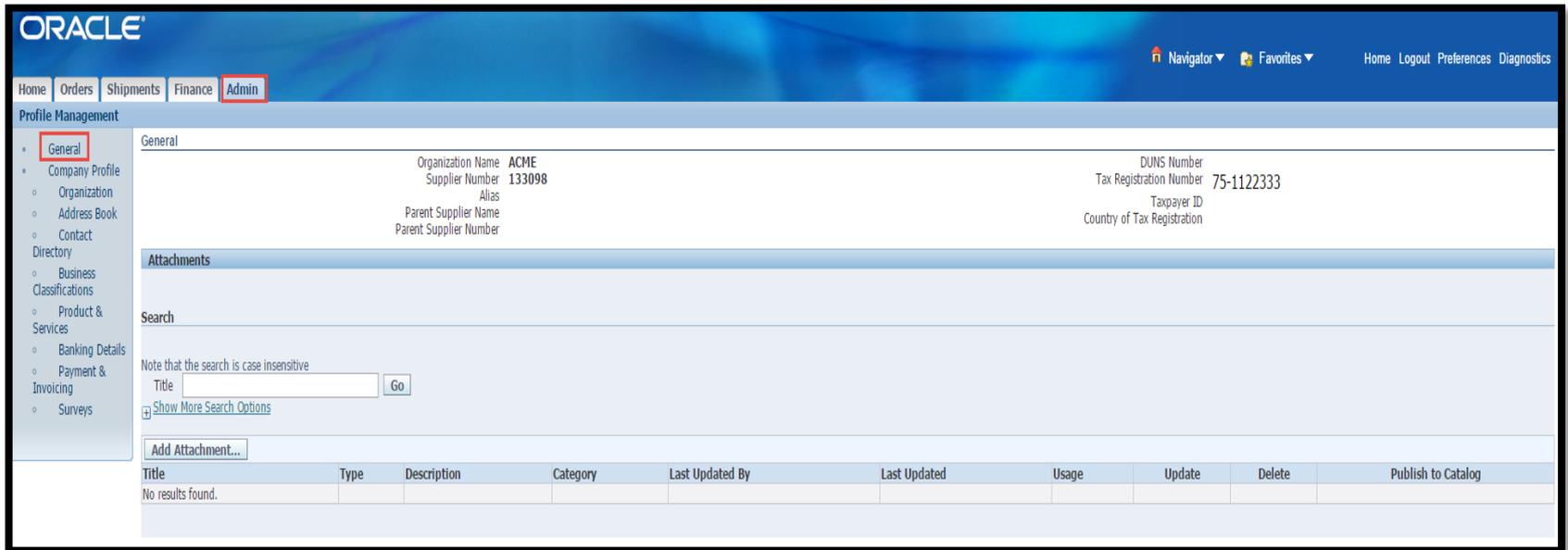
Advanced Procurement – iSupplier Portal

Key Features of iSupplier Portal at UL

1. Self-Service Maintenance
2. Invoice creation
3. Increased Communication: Viewing of PO, Invoice, Receipt Data

Advanced Procurement – iSupplier Portal

➤ Supplier Self Service Administration



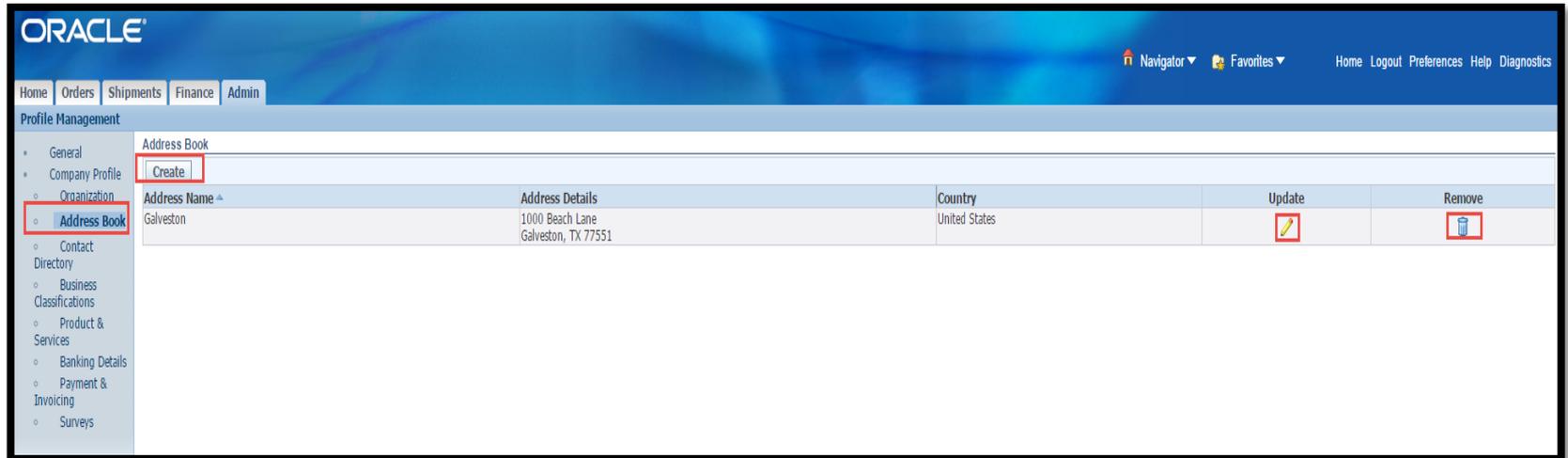
The screenshot displays the Oracle iSupplier Portal's 'Admin' section. The 'Profile Management' area is active, showing the 'General' tab for organization 'ACME'. The page includes a navigation menu with 'Admin' highlighted, a search bar, and a table for attachments. The organization details are as follows:

Field	Value
Organization Name	ACME
Supplier Number	133098
DUNS Number	
Tax Registration Number	75-1122333
Alias	
Parent Supplier Name	
Parent Supplier Number	
Taxpayer ID	
Country of Tax Registration	

The 'Attachments' section is currently empty. Below it is a search bar with the text 'Note that the search is case insensitive' and a 'Go' button. A table for attachments is shown at the bottom, with columns for Title, Type, Description, Category, Last Updated By, Last Updated, Usage, Update, Delete, and Publish to Catalog. The table currently contains the text 'No results found.'

Advanced Procurement – iSupplier Portal

➤ Address Book



ORACLE

Navigator Favorites Home Logout Preferences Help Diagnostics

Home Orders Shipments Finance Admin

Profile Management

Address Book

Create

Address Name ▲	Address Details	Country	Update	Remove
Galveston	1000 Beach Lane Galveston, TX 77551	United States		

Advanced Procurement – iSupplier Portal

Profile Management

Contact Directory : Active Contacts

[Create](#)

First Name	Last Name	Supplier Name ▲	Phone Number	Email	Status	User Account	Addresses	Update
New User	Acme	ACME	469-867-5309	NewUser@acme.com	Current	✓		

Admin: Profile Management: Contact Directory >

Add Contact

* Indicates required field

Contact Information

Contact Title: [▼]

First Name:

Middle Name:

* Last Name:

Alternate Name:

Job Title:

Department:

Email Address:

Uri:

Phone Area Code:

Phone Number:

Phone Extension:

Alternate Phone Area Code:

Alternate Phone Number:

Fax Area Code:

Fax Number:

Inactive Date:

User Account

Create User Account for this Contact:

* Supplier Name:

* Username:

User Notifications

Certification Reminders

Responsibilities

Select All | Select None

Select Responsibility	Application
<input checked="" type="checkbox"/> UL iSupplier Portal Admin	iSupplier Portal
<input type="checkbox"/> UL Sourcing Supplier User	Sourcing

User Access Restrictions

If no Supplier Sites or Contacts are specified, the user will be able to access all the data for this supplier.

Supplier Restriction

Suppliers:

Site Restriction

Modify Sites

Supplier	Site	Operating Unit
Access not restricted by Supplier Site.		

Advanced Procurement – iSupplier Portal

➤ Banking Information

The screenshot displays the 'Banking Details' section of the iSupplier Portal. The page includes a navigation menu on the left with 'Banking Details' selected. The main content area shows a table of banking information. The table has the following columns: Details, Account Number, IBAN, Currency, Bank Name, Start Date, End Date, Priority, Increase Priority, Decrease Priority, Status, and Update. A single row is visible with the following data: Account Number: XXXXXX6789, Bank Name: BANK OF TEXAS, Start Date: 08-Sep-2016, Priority: 1, Status: Approved. The 'Update' button for this row is highlighted with a red box. The 'Add' and 'Create' buttons are also highlighted with a red box. The 'Cancel' and 'Save' buttons are visible at the bottom right of the table.

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
Show	XXXXXX6789			BANK OF TEXAS	08-Sep-2016		1	⬆	⬇	Approved	✎

➤ Any changes to the banking information will require approval from UL.

Advanced Procurement – iSupplier Portal

➤ Invoice Creation

ORACLE iSupplier Portal

Home Orders Shipments Finance Admin

Create Invoices View Invoices View Payments

Invoice Actions

Create Invoice With a PO Go

Search

Note that the search is case insensitive

Supplier ACME

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 Invoice With a PO Go

Supplier can submit an invoice online to UL based on the purchase order lines they have fulfilled.

Personalized the screen to default and lock to “With a PO”

Advanced Procurement – iSupplier Portal

➤ Increase Communication

The screenshot displays the Oracle iSupplier Portal interface. At the top, there is a navigation bar with tabs for Home, Orders, Shipments, Finance, and Admin. A search bar is located below the navigation tabs, with a dropdown menu set to 'PO Number' and a 'Go' button. On the right side of the navigation bar, there are links for Navigator, Favorites, Home, Logout, Preferences, and Help.

The main content area is divided into several sections:

- Notifications:** A table with columns 'Subject' and 'Date'. It lists five notifications related to purchase orders, each with a 'Full List' link.
- Orders At A Glance:** A table with columns 'PO Number', 'Description', and 'Order Date'. It lists five purchase orders with their respective dates and a 'Full List' link.
- Shipments At A Glance:** A table with columns 'Shipment Number', 'Packing Slip', and 'Shipment Date'. It shows 'No results found.'

On the right side of the interface, there is a sidebar with a navigation menu:

- Orders:** Includes links for Agreements, Purchase Orders, and Purchase History.
- Shipments:** Includes links for Delivery Schedules, Overdue Receipts, and Advance Shipment Notices.
- Receipts:** Includes links for Receipts and On-Time Performance.
- Invoices:** Includes a link for Invoices.
- Payments:** Includes a link for Payments.

Advanced Procurement – iSupplier Portal

➤ PO Data

The screenshot displays the Oracle iSupplier Portal interface. At the top, there is a navigation bar with 'ORACLE iSupplier Portal' on the left and 'Home Logot Preferences Help' on the right. Below this is a secondary navigation bar with 'Home Orders Shipments Finance Admin' and a sub-menu for 'Purchase Orders' containing 'Purchase Orders', 'Agreements', 'View Requests', 'Work Confirmations', 'Timecards', and 'Purchase History'. The main content area is titled 'Purchase Orders' and includes buttons for 'Multiple PO Change' and 'Export'. A 'Views' section shows a dropdown menu set to 'All Purchase Orders' and a 'Go' button, along with an 'Advanced Search' button. Below this is a table of purchase orders with columns for 'Select Order', 'PO Number', 'Rev', 'Operating Unit', 'Document Type', 'Description', 'Order Date', 'Buyer', 'Currency', 'Amount', 'Status', 'Acknowledge By', and 'Attachments'. The table contains 12 rows of data. At the bottom, there is another 'Select Order' section with buttons for 'Acknowledge', 'Request Cancellation', 'Request Changes', and 'View Change History', and another set of 'Multiple PO Change' and 'Export' buttons.

Select Order:	Acknowledge	Request Cancellation	Request Changes	View Change History							
PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
<input type="radio"/>	7202057131	0	UL LLC	Standard PO	08-Sep-2016 10:53:53	Lewis, Michael	USD	55.00	Requires Acknowledgment		
<input type="radio"/>	7202057130	0	UL LLC	Standard PO	08-Sep-2016 10:53:02	Lewis, Michael	USD	70.00	Requires Acknowledgment		
<input type="radio"/>	7202057129	0	UL LLC	Standard PO	08-Sep-2016 10:52:17	Lewis, Michael	USD	500.00	Requires Acknowledgment		
<input type="radio"/>	7202057128	0	UL LLC	Standard PO	08-Sep-2016 10:51:23	Lewis, Michael	USD	1000.00	Requires Acknowledgment		
<input type="radio"/>	7202057127	0	UL LLC	Standard PO	08-Sep-2016 10:50:17	Lewis, Michael	USD	77.70	Requires Acknowledgment		
<input type="radio"/>	7202057126	0	UL LLC	Standard PO	08-Sep-2016 10:49:22	Lewis, Michael	USD	505.00	Requires Acknowledgment		
<input type="radio"/>	7202057125	0	UL LLC	Standard PO	08-Sep-2016 10:46:11	Lewis, Michael	USD	1000.00	Open		
<input type="radio"/>	7202057124	0	UL LLC	Standard PO	08-Sep-2016 10:44:39	Lewis, Michael	USD	582.70	Requires Acknowledgment	13-Sep-2016 00:00:00	
<input type="radio"/>	7202057123	0	UL LLC	Standard PO	08-Sep-2016 10:43:42	Lewis, Michael	USD	77.70	Requires Acknowledgment	11-Sep-2016 00:00:00	
<input type="radio"/>	7202057122	0	UL LLC	Standard PO	08-Sep-2016 10:42:56	Lewis, Michael	USD	505.00	Requires Acknowledgment	09-Sep-2016 00:00:00	
<input type="radio"/>	7202057121	0	UL LLC	Standard PO	08-Sep-2016 10:42:14	Lewis, Michael	USD	1000.00	Requires Acknowledgment	09-Sep-2016 00:00:00	

Advanced Procurement – iSupplier Portal

➤ PO Data

ORACLE iSupplier Portal

Home | Orders | Shipments | Finance | Admin

Purchase Orders | Agreements | View Requests | Work
Orders: Purchase Orders >

Standard Purchase Order: 7202057131, 0 (Total USD 55.00)
Currency=USD

Order Information

General

Total **55.00**
Supplier **ACME**
Supplier Site **Galveston**
Address **1000 Beach Lane
Galveston, TX 77551**
Buyer **Lewis, Michael**
Order Date **08-Sep-2016 10:53:53**
Description
Status **Requires Acknowledgment**
Note to Supplier
Operating Unit **UL LLC**
Sourcing Document
Supplier Order Number
Attachments **None**

PO Details

Show All Details | Hide All Details

Details	Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status
Show	1	Goods			ACME Calibration Tools	Each	10	5.5	55.00	Open

UL LLC
333 Pfingsten Road
Northbrook, 60062
United States

Supplier: **ACME**
1900 Besch Lane
Galveston, TX 77551
United States

Ship To: **2600 N.W. Lake Road
Camas, WA 98607
United States**

Bill To: **333 Pfingsten Road
Northbrook, IL 60062
United States**

Customer Account No.	Supplier Site	Payment Terms	Freight Terms	Unit	Transportation	Ship Via
133095	24410N60	Prepaid	DESTINATIO	N		

Confirm To/Telephone
Lewis, Mr. Michael +1 360 817 5533

Requestor/Driver To
Lewis, Mr. Michael

Note: All prices and amounts on this order are expressed in USD unless otherwise specified, and all invoices must reference the above PO number. Unless otherwise stated within, this Purchase Order shall be governed by UL's Purchase Order Terms and Conditions located at this web site: <http://www.ul.com/supplier>. These terms and conditions are incorporated herein by reference.

Line	Part Number / Description	Delivery Date	Quantity	UOM	Unit Price (USD)	Qty Invoiced	Amount (USD)
1	ACME Calibration Tools Ship To: Use the ship-to address at the top of page 1 Deliver To: Lewis, Mr. Michael (10) Michael.L.Lewis@ul.com	15-SEP-2016	10	Each	5.5	Y	55.00

Advanced Procurement – iSupplier Portal

➤ Receipt Data

The screenshot shows the 'View Receipts' page in the iSupplier Portal. The navigation bar includes 'Home', 'Orders', 'Shipments', 'Finance', and 'Admin'. The 'Receipts' sub-menu is active, showing options for 'Delivery Schedules', 'Shipment Notices', 'Receipts', 'Overdue Receipts', and 'On-Time Performance'. The page features a 'Simple Search' section with the following fields:

- Receipt Number
- PO Number (example: 1234)
- Release Number (example: 1234-2)
- Shipment Number
- Shipped Date (example: 24-Aug-2016)
- Organization
- Item Number
- Supplier Item
- Item Description

Buttons for 'Go', 'Clear', 'Advanced Search', and 'Export' are present. Below the search fields is a table of receipt data:

Receipt	Creation Date	Organization	Shipment	Shipped Date	Packing Slip	Containers	Waybill/Airbill	Freight Carrier	Bill of Lading	PO Number	Invoice	Attachments
26600	08-Sep-2016 13:11:42	UL LLC 720								Multiple		
26599	08-Sep-2016 13:11:30	UL LLC 720								Multiple		
26598	08-Sep-2016 13:11:15	UL LLC 720								Multiple		
26597	08-Sep-2016 13:10:52	UL LLC 720								Multiple		

Advanced Procurement – iSupplier Portal

➤ Invoice Data

Home | Orders | Shipments | Finance | Admin

Create Invoices | **View Invoices** | View Payments

View Invoices Export

Simple Search Advanced Search

Invoice Number

PO Number (example : 1234)

Release Number (example : 1234-2)

Payment Number

Invoice Status

Payment Status

Invoice Amount From To

Amount Due From To

Invoice Date From To

Due Date From To (example: 24-Aug-2016)

Invoice	Invoice Date	Type	Currency	Amount	Due Status	On Hold	Payment Status	Remit-to Supplier	Remit-to Supplier Site	Due Date	Payment	PO Number	Receipt	Discount Date	Available Discount Attachments
ACME1	08-Sep-2016	Standard	USD	75.88	75.88 In-Process		Not Paid			07-NOV-2016		7202057130		18-Sep-2016	1.40

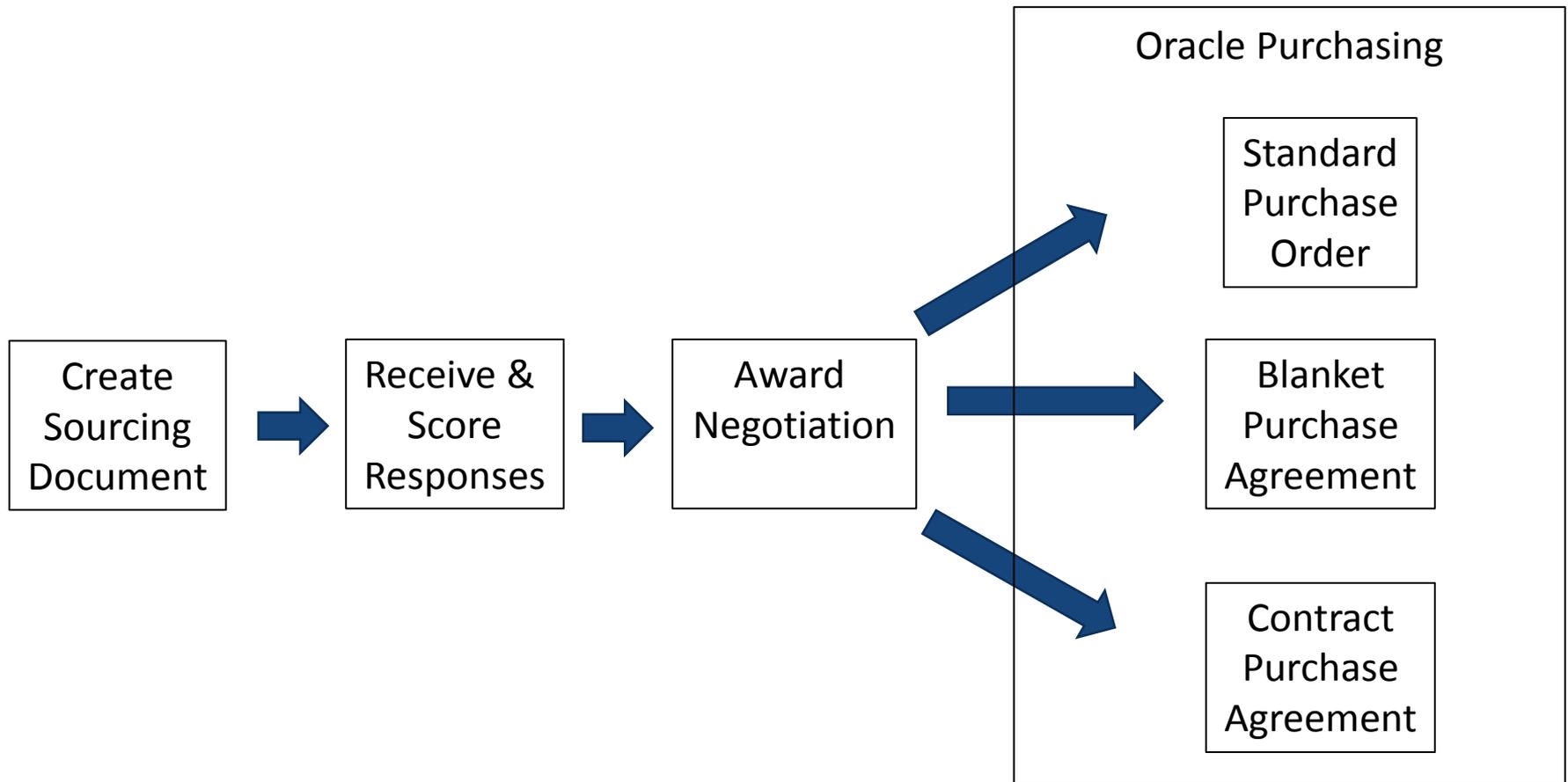


Sourcing

Advanced Procurement – Oracle Sourcing

- Oracle Sourcing increases the sourcing bandwidth of procurement professionals so they can exploit many more savings opportunities and capture more value from each.
- Online collaboration and negotiation makes it easy for participants from multiple organizations to exchange information, conduct bid and auction processes, and create and implement agreements. Professional buyers, business experts, and suppliers exchange information online for a more agile and accurate sourcing process

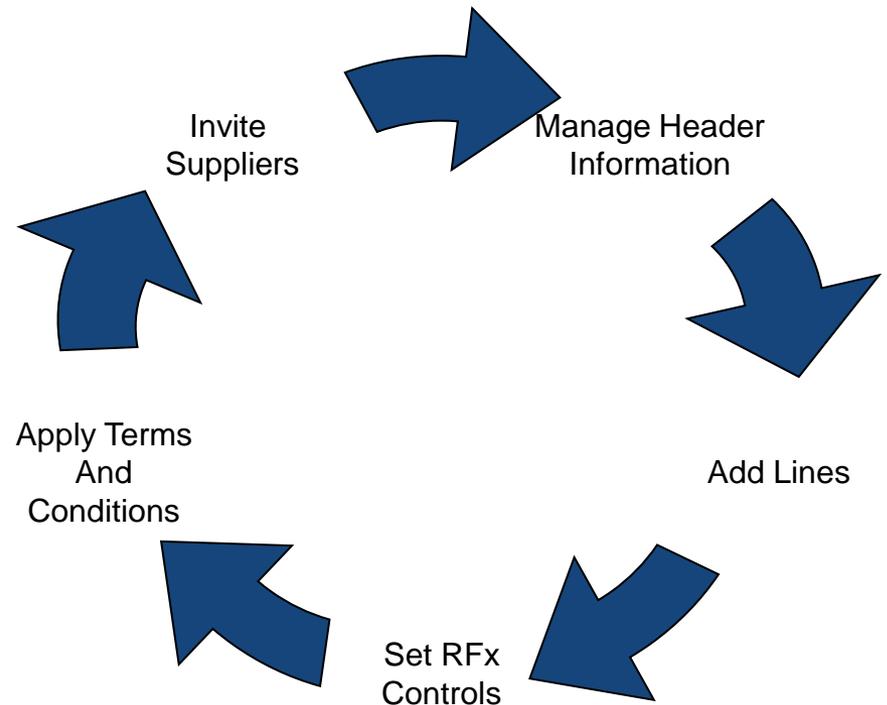
Advanced Procurement – Oracle Sourcing



Advanced Procurement – Oracle Sourcing

➤ Managing and Finalizing Request for Quotation (RFx) Creation

- Header
- Lines
- Control
- Terms and Conditions
- **Supplier Management**



Advanced Procurement – Oracle Sourcing

➤ Header – Team and Terms

ORACLE Sourcing | Requisitions | Negotiations | Intelligence | Administration

Confirmation: RFQ 1001 has been saved as a draft.

Create RFQ 1001: Header

* Indicates required field

Buttons: Cancel | Online Discussions | Save as Draft | Review

Header Information:

- Title: Surfboard RFQ
- Negotiation Style: Standard Negotiation
- Quote Style: Blind
- Event: [Dropdown]
- Security Level: Public
- Sourcing Project: [Dropdown]
- Buyer: Lewis, Mr. Michael
- Operating Unit: UL LLC
- Outcome: Standard Purchase Order
- Description: RFQ to provide 10 Surfboards to UL for various beach projects

Collaboration Team

Select Members: Notify

Select * Member	Position	Approver	Access	Task	Target Date	Last Notified	Remove
<input type="checkbox"/> Cady, Robert (Bob)		<input type="checkbox"/>	Scoring				
<input type="checkbox"/> Chang, Wei-Chia (Megan)		<input type="checkbox"/>	Scoring				
<input type="checkbox"/> Lewis, Michael		<input type="checkbox"/>	Full				
<input type="checkbox"/> McNally, Patrick		<input checked="" type="checkbox"/>	Full				

Buttons: Add Another Row

Terms

- * Bill-To Address: United States - Northbrook
- * Ship-To Address: United States - Northbrook
- FOB: DESTINATION
- Payment Terms: NET45
- Carrier: [Dropdown]
- Freight Terms: Prepaid

Currency: USD | Price Precision: 2 | Manage Response Currencies

Advanced Procurement – Oracle Sourcing

➤ Header - Requirements

Requirements

Display Scoring Criteria to Suppliers **No** [Select Scoring Settings](#)

Select Requirement: [Add Section](#) [Add Requirement](#) [Move](#) [Delete](#) | Actions [Add Requirement List](#) [Go](#) [Manage Dependencies](#)

[Select All](#) | [Select None](#) | [Expand All](#) | [Collapse All](#)

Select Focus Title	Type	Target	Maximum Score	Update
<input type="checkbox"/> Requirements				
<input type="checkbox"/> General Information				✎
<input type="checkbox"/> Insurance	Supplier Required	Yes	5	✎
<input type="checkbox"/> Employee	Supplier Required	20	5	✎
<input type="checkbox"/> Environmental Impacts				✎
<input type="checkbox"/> Foam Type	Supplier Required		5	✎

Grand Total

Maximum Score 15 [Recalculate](#)

Notes and Attachments

Note to Suppliers

[Add Attachment...](#)

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

[Cancel](#) [Online Discussions](#) [Save as Draft](#) [Review](#)

Advanced Procurement – Oracle Sourcing

➤ Lines

Requisitions | Negotiations | Intelligence | Administration

Lines: Create Line 1 (RFQ 1001)

* Indicates required field

Line Type: Goods Currency: USD
 Price Precision: 2 decimal places
 Item: Start Price:
 Rev: Target Price: 347
 * Description: Surfboards Display To Suppliers
 * Category: IT.. Current Price: 467
 Unit of Measure: Each Need-By From: 02-Jun-2016 12:59:04
 * Quantity: 200 Need-By To: 02-Jun-2017 12:59:17
 * Ship-To Address: United States - Northbrook

Attribute

Attribute	Group	Attribute Type	Value Type	Target Value	Display Target	Weight	Score	Delete
White	General	Required	Text	<input type="text"/>	<input type="checkbox"/>	5	<input type="text"/>	<input type="button" value="Delete"/>
<input type="button" value="Recalculate"/> Total						5		

Cost Factors

Line Target Price: Display to Suppliers

Cost Factor	Description	Type	Pricing Basis	Display To Suppliers	Target Value	Display Target	Delete
AP Freight Cost	AP Freight Cost from Oracle Transportation	Supplier	Fixed Amount	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="Delete"/>

Notes and Attachments

Note to Suppliers:

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
No results found.									

Advanced Procurement – Oracle Sourcing

➤ Controls

Requisitions | Negotiations | Intelligence | Administration

Header Create RFQ 1001: Controls
Lines * Indicates required field

Control Schedule

Suppliers

Preview Date Immediately
 Specify Time

Open Date Immediately
 Specify Time

* Close Date 01-Jun-2016 13:28:22

Award Date 01-Jun-2016 13:28:33

Response Rules

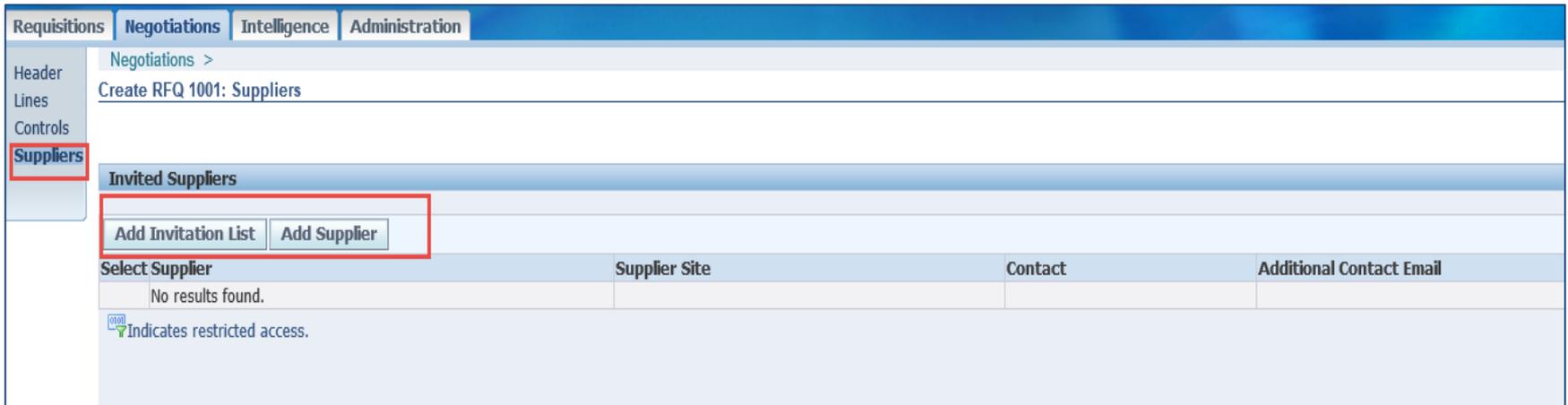
- Restrict to invited suppliers
- Allow supplier to select lines on which to respond
- Display best price to suppliers
- Require full quantity
- Allow multiple responses
- Allow manual close before the Close Date
- Allow manual extend when the negotiation is open

Buttons: Cancel, Online Discussions, Save as Draft, Review

Advanced Procurement – Oracle Sourcing

➤ Invite Suppliers

- Pick suppliers to invite individually
- Pick a reusable list of suppliers
- Invite additional contacts to register with supplier invitation



The screenshot shows the Oracle Sourcing interface for 'Create RFQ 1001: Suppliers'. The 'Suppliers' tab is selected in the left-hand navigation menu. The main content area is titled 'Invited Suppliers' and contains two buttons: 'Add Invitation List' and 'Add Supplier', which are highlighted with a red box. Below the buttons is a table with the following columns: 'Select Supplier', 'Supplier Site', 'Contact', and 'Additional Contact Email'. The table currently displays 'No results found.' and a small icon with the text 'Indicates restricted access.'

Select Supplier	Supplier Site	Contact	Additional Contact Email
No results found.			

Advanced Procurement – Oracle Sourcing

➤ Invite Suppliers

- Search on detailed criteria or specific names

Suppliers: Add Suppliers (RFQ 1001)

Search Suppliers

Status:

Supplier Name:

Category Selection: Commodity Category All categories in RFQ 1001

Search Category in: Supplier Profile Approved Supplier List Negotiation History

[Show Approved Supplier List and Business Classifications Criteria](#)

Select Suppliers:

Select All | Select None

Select Supplier	Approved Supplier List Entry	Purchasing Documents	Negotiations	
			Invited	Awarded
<input checked="" type="checkbox"/> Surf Boards R Us		5	1	0

Invited Suppliers
No Invited Suppliers exist. Search Suppliers and Add to Invited Suppliers from the search results table

Advanced Procurement – Oracle Sourcing

➤ Register New Suppliers

The screenshot shows the Oracle Sourcing interface for registering a new supplier. The page title is 'ORACLE Sourcing'. The navigation bar includes 'Requisitions', 'Negotiations', 'Intelligence', and 'Administration'. The 'Negotiations' tab is active, and the sub-tab 'Suppliers: Register New Supplier' is selected. A red box highlights the sub-tab and its instructions: 'Registered supplier will be added to the invited suppliers list.' and '* Indicates required field'. The form contains the following fields:

- * Supplier Name
- * Address Name
- Country (Dropdown menu, currently set to 'United States')
- * Address Line 1
- Address Line 2
- Address Line 3
- Address Line 4
- * City/Town/Locality
- County
- * State/Region
- Province
- * Postal Code
- Contact First Name
- * Contact Last Name
- Contact Phone Area Code
- Contact Phone
- Contact Phone Extension
- Contact Fax Area Code
- Contact Fax
- * Contact Email

Buttons for 'Cancel', 'Register', and 'Register and Approve' are located at the top right and bottom right of the form area. A red box highlights the 'Register' and 'Register and Approve' buttons at the top right.

Advanced Procurement – Oracle Sourcing

➤ Review

ORACLE Sourcing Navigator Favorites Home Logout Preferences Help Diagnostics

Requisitions Negotiations Intelligence Administration

Create RFQ 1001: Review

Title **Surfboard RFQ** Cancel Actions Supplier Printable View Go Submit For Approval
Status **Draft**

Header Lines Controls Suppliers Update

Buyer **Lewis, Mr. Michael** Approval Status **Requires Approval**
 Negotiation Style **Standard Negotiation** Operating Unit **UL LLC**
 Quote Style **Blind** Outcome **Standard Purchase Order**
 Security Level **Public** Event
 Sourcing Project
 Description **RFQ to provide 10 Surfboards to UL for various beach projects**

Collaboration Team

Member	Position	Approver	Approval Status	Access	Task	Target Date	Task Completed	Last Notified
Cady, Robert (Bob)		No		Scoring				
Chang, Wei-Chia (Megan)		No		Scoring				
Lewis, Michael		No		Full				
McNally, Patrick		Yes		Full				

Terms

Bill-To Address [United States - Northbrook](#) Payment Terms **NET45**
 Ship-To Address [United States - Northbrook](#) Carrier
 FOB **DESTINATION** Freight Terms **Prepaid**

Currency

RFQ Currency **USD** Price Precision **2**

Requirements

Display Scoring criteria to Suppliers **No**

[Show All Details](#) | [Hide All Details](#)

Details	Section	Scoring Team	Maximum Score
Show	General Information		10
Show	Environmental Impacts		5
			Total 15

Abstract and Forms

Advanced Procurement – Oracle Sourcing

➤ View and Submit

The screenshot displays two overlapping windows. The left window is Adobe Reader showing a PDF document titled '1001_SUPPLIER_US.pdf'. The document content includes:

Request for Quotation 1001

Title: Surfboard RFQ
 Preview Date: Immediately
 Close Date: 01-JUN-2016 13:28:22
 Time Zone: [blank]
 Open Date: Immediately
 Award Date: 01-JUN-2016 13:28:33
 Event: Not Specified
 Note: Not Specified

Please submit your response to:

Company: UL LLC
 Buyer: Lewis, Mr. Michael
 Location: UL LLC
 333 Pfingsten Road
 Northbrook, IL
 United States
 Phone: +1 360 817 5533
 Fax: +1 360 817 6067
 Email: Michael.L.Lewis@ul.com

When submitting your response, please include the following information:

Your Company Name	
Address	
Contact Details	
Response Valid Until	

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The right window is a browser showing a review page for '01: Review'. It features a blue header with navigation links (Home, Logout, Preferences, Help, Diagnostics) and a 'Favorites' dropdown. Below the header, there are buttons for 'Cancel', 'Actions', 'Supplier Printable View' (dropdown), 'Go', and 'Submit For Approval'. The status is 'Draft'. An 'Update' button is visible on the right. The page also displays 'Approval Status: Requires Approval', 'Operating Unit: UL LLC', and 'Outcome: Standard Purchase Order'. At the bottom, there is a table with columns: Task, Target Date, Task Completed, and Last Notified. Below the table, 'Payment Terms' are listed as 'NET45' and 'Carrier' is listed.

Advanced Procurement – Oracle Sourcing

➤ Setup considerations

Notification Subscription

✔ TIP Selected notifications will be sent to users

Cancel Apply

Buyer Notifications

Notifications	Auction	RFQ	RFI
Negotiation Approval: Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Negotiation Approval: Rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Negotiation Open	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Collaboration Team Task Completed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Online Discussion Message Sent to Buyer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Response Submitted	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Award Approval: Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Award Approval: Rejected	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Supplier Notifications

Notifications	Auction	RFQ	RFI
New Round to Excluded Suppliers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Online Discussion Message Sent to Supplier	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Negotiation Cancellation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Negotiation Early Close	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Negotiation Extension	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Response Disqualification to Disqualified Suppliers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Response Disqualification to Other Invitees and Respondents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Award Decision	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Cancel Apply

Advanced Procurement – Oracle Sourcing

➤ Supplier Response

- Accept Terms and Conditions

Requisitions | Negotiations | Intelligence | Administration

Negotiations > RFQ: 1001 >

Terms and Conditions

The following terms and conditions must be accepted before a quote is placed in this RFQ.

Cancel Accept

Please note that you are accepting the standard UL terms and conditions as attached in this document and responding as such.

Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
Undefined	Short Text		To Supplier	UL52364	31-May-2016	One-Time			

* I have read and accepted the terms and conditions

Cancel Accept

Copyright (c) 2006, Oracle. All rights reserved. Requisitions Negotiations Intelligence Administration Close Window Preferences Help Diagnostics

Advanced Procurement – Oracle Sourcing

➤ Supplier Response

- Header Information

Requisitions | **Negotiations** | Intelligence | Administration

Negotiations > RFQ: 1001 > Create Surrogate Quote: Select Supplier and Contact >

Confirmation
Quote 1 for RFQ 1001 (Surfboard RFQ) has been saved as a draft.
Create Quote: 1 (RFQ 1001)

Title Surfboard RFQ

Time Left **21:15:15**
Close Date **01-Jun-2016 13:28:22**

Cancel View RFQ Quote By Spreadsheet Save Draft Continue

Header Lines

Supplier **Surf Boards R Us**
RFQ Currency **USD**
Quote Currency **USD**
Price Precision **2 decimals maximum**

Quote Received Time 31-May-2016 16:12:19
Quote Valid Until 22-Jun-2016
Reference Number Response1234
Note to Buyer Thank you

Attachments

Add Attachment...

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Requirements

Expand All | Collapse All

Focus Title	Target Value	Quote Value
Requirements		
General Information		
Insurance		YES
Employee		300
Environmental Impacts		
Foam Type		Polystyrene

Cancel View RFQ Quote By Spreadsheet Save Draft Continue

Advanced Procurement – Oracle Sourcing

➤ Supplier Response

- Line Information

Requisitions | Negotiations | Intelligence | Administration

Negotiations > RFQ: 1001 > Create Surrogate Quote: Select Supplier and Contact >
Create Quote: 1 (RFQ 1001)

Title: Surfboard RFQ

Time Left: 21:12:59
Close Date: 01-Jun-2016 13:28:22

Header | Lines

Line	Update	RFQ Currency	Price Precision	Rank	Start Price	Target Price	Line Price	Quote Price	Total Score	Unit	Target Quantity	Quote Quantity	Promised Date
1		USD	2 decimals maximum	Blind			330	345.00	5	Each	200	200	23-Jun-2016

Indicates more information requested. Click the Update icon.

Cancel View RFQ Quote By Spreadsheet Save Draft Continue

Requisitions | Negotiations | Intelligence | Administration

Create Quote 1: Line 1 (RFQ 1001)

Description: Surfboards
Unit: Each
Start Price: 345.00
Target Price: 345.00
Target Quantity: 200
Quote Quantity: 200

Close Date: 01-Jun-2016 13:28:22
Quote Currency: USD
Rank: Blind
Ship-To: United States - Northbrook
Need-By Date: 02-Jun-2016 12:59:04 to 02-Jun-2017 12:59:17
Promised Date: 23-Jun-2016

Pay Items

Attributes

Group	Attribute	Attribute Type	Target Value	Quote Value
General	White	Required		Yes

Notes

Attachments

Cost Factors

Cost Factor	Type	Target Value	Quote Value	Pricing Basis
Line Price	Supplier		330	Per-Unit (Each)
Freight	Supplier		15	Per-Unit (Each)

Cancel Save Draft Apply

Advanced Procurement – Oracle Sourcing

➤ Buyer Monitor

Requisitions | **Negotiations** | Intelligence | Administration

Negotiations >
Live Console (RFQ 1001)
Title Surfboard RFQ Time Left **21:00:57** Actions Analyze by Quote

Overview

Symbol	Supplier	Quote	Online
<input checked="" type="radio"/>	Surf Boards R...	1	
<input type="checkbox"/>	Paddle Boards ...	2	<input type="button" value="Go"/>

View Best Quotes by Time

View Savings by Supplier

Lines

1: Surfboards

Select Line	Savings	Quotes
<input checked="" type="radio"/> 1 Surfboards	26.12%	2

View Best Quotes by Time

View Savings by Supplier

RFQ Currency USD
This page was last updated: 31-May-2016 16:26:51
[TIP](#) [Icon Key](#)
[Return to Negotiations](#)

Advanced Procurement – Oracle Sourcing

➤ Award and generate purchasing document

Requisitions | Negotiations | Intelligence | Administration

Create Purchase Order (RFQ 1001)

* Indicates required field

Cancel Save Submit

Title [Surfboard RFQ](#) Operating Unit **UL LLC**

Purchasing Document Style **Standard Purchase Order**

Standard Purchase Order Details

[Show All Details](#) | [Hide All Details](#)

Details Supplier	Contact	*Supplier Site	*Buyer	*Acceptance Required	Initiate Approval
Hide Surf Boards R Us	Man, Sales	Galveston ▾	Lewis, Michael 🔍	Document ▾	<input type="checkbox"/>

Item, Rev	Description	Promised Date	Award Quantity	Line Price (PO Currency)
	Surfboards	23-Jun-2016 16:15:13	200 (Each)	330.00 (USD)

Cancel Save Submit

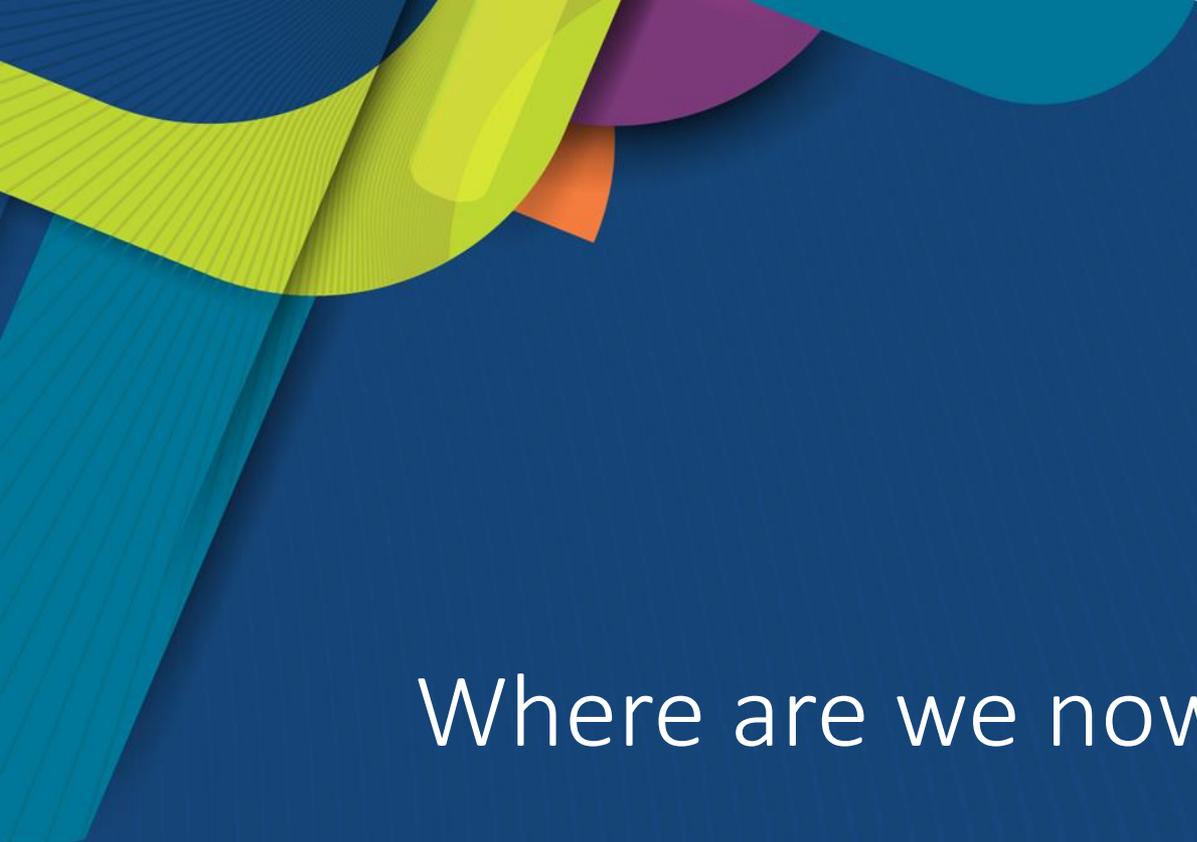


Roll Out Considerations

Advanced Procurement - Considerations

- Can your suppliers handle evaluated receipt settlement?
- Bank information entry and country specific requirements.
- Contingent worker maintenance requires HR support. Are they ready?
- Sourcing Complexity – what you put into it is what you get out of it.

➤ COORDINATION & COMMUNICATION



Where are we now?

Advanced Procurement – Where are we now

iSupplier

- 59 users across 16 suppliers
- 45 invoice lines entered via portal

Services Procurement

- 41 contractors

Sourcing

- 2 events: 1 RFI, 1 RFQ

Advanced Procurement – Next Steps

- Global Expansion of iSupplier: Focus on high invoice volume suppliers. Expansion of Services Procurement.
- Expanded timecard invoice reporting/visibility for services suppliers on pay on receipt (who & when a payment is for).
- Communication templates to engage sourcing, payables, key requisitioners, supplier sales & receivables.