Keys to Launching the iSupplier Portal

Presented to: SCOUG
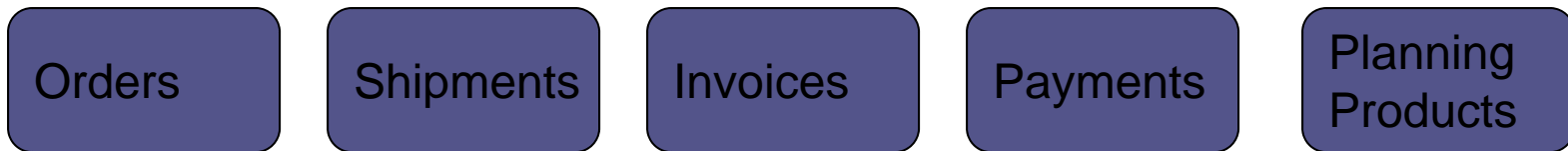
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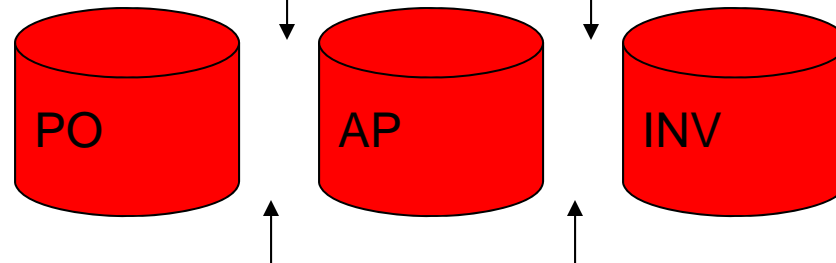ORACLE PARTNER

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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
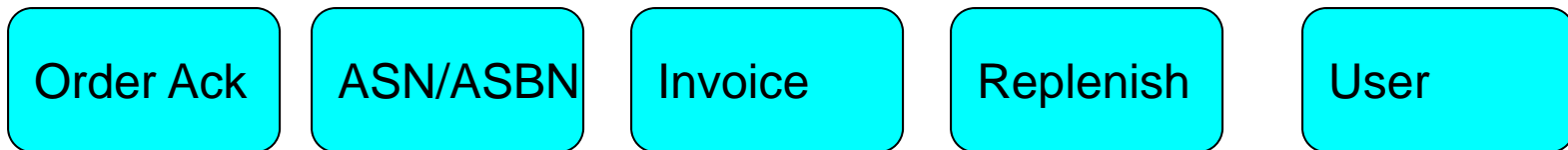 - Determine the Functions to Deploy
  - Setup and Maintain Users

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iSupplier Portal Functions

Orders	Shipments	Invoices	Payments	Planning Products

Self-Service Inquiry Functions

PO   AP   INV

Self-Service Transaction Functions

Order Ack	ASN/ASBN	Invoice	Replenish	User

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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

– Drill down on Order, Agreements, Releases

– Compare revision history changes

– Work orders, timecards with EAM, OTL

– Request changes, cancellations

Shipments Inquiry

– Access expected deliveries and schedules

– View delivery performance (early, on-time, late)

– View quality performance

– Reconcile return shipments

Planning Functions

– View Forecasts

Financial Functions

– Create PO related invoices

– Create Non-PO invoices

– View Invoices

– View Payments

Product Inquiry

– View Approval Supplier List Entries

– View Consigned/View and Replenish VMI

– View Order Modifiers and Quality Plans

– Maintain Capacity

Intelligence

–View KPI's related to the Supplier

–Daily Business Intelligence

Administration

– 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

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Self-Service Transactions

Acceptance of Agreement Changes

From Supplier
- ◉ Always
- ○ Never
- ○ When Price Changes Exceed Tolerance

From Catalog Administrator
- ○ Always
- ◉ Never
- ○ When Price Changes Exceed Tolerance

-Automate supplier agreement change requests based on your choices

-Impacts catalog management

Self-Service Transactions

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

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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

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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?

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Key 2 – Design Responsibilites

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

Key 3 – Personalize Pages
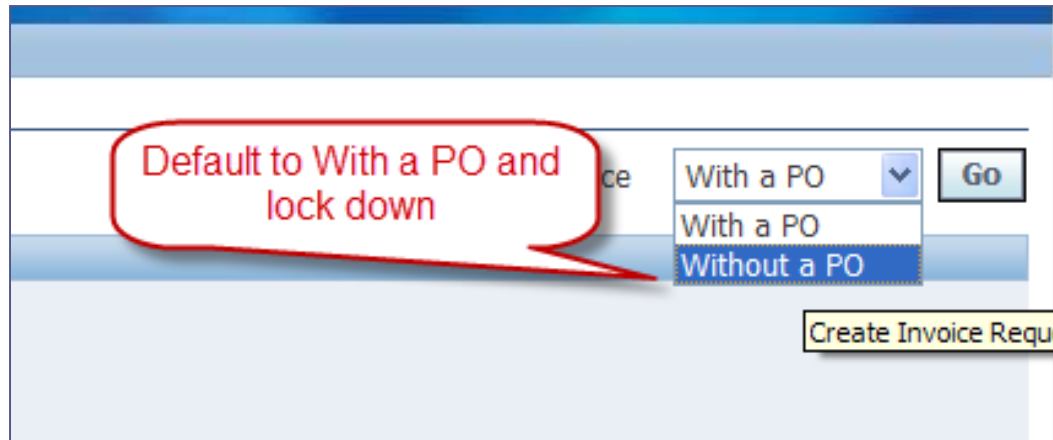
- Determine fields to hide or display
- Control fields updateable on transactions
- Reorder sort criteria
- Change application messages (tips)

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

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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

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Questions?

Thank you

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