



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

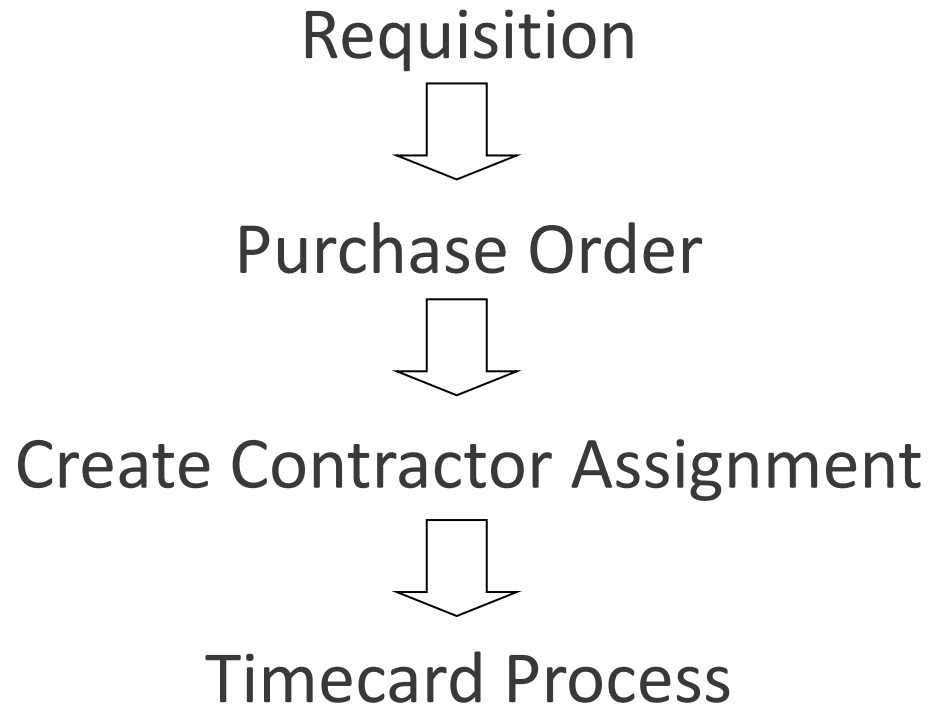
- Utilize some of Oracle's Advanced Procurement options to increase efficiencies!
 - **Services Procurement** – Generate requests for contingent labor from pre-identified vendors when possible.
 - **iSupplier portal** – Used to communicate all aspects of the process. Contingent worker needs, purchase 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



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

ORACLE iProcurement

Shop Requisitions Receiving **Contractors** Assessments

Contractors | Performance

Contractors

Create Contractor Request View Contractor Performance

Views

View Active Contractors Go

Name	Job Description	Requisition	Start Date	End Date	Purchase Order	Supplier	PO Amount Billed (USD)	PO Amount Remaining (USD)	View Timecard
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	

Create Contractor Request 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 Rate Based Temporary Labor

* Job Contractor

Category IT..

Job Description IT Contractor

Important ☒ Require Candidate Screening

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

* Start Date 23-Jun-2016

End Date 30-Jun-2016

* Requester Lewis, Michael

* Location United States - Northbrook

[Enter one-time address](#)

* Contact Information Gary Marines - 469-556-7104

Key Considerations:

➤ Require Candidate Screening or Not?

Services Procurement - iProcurement

Edit Contractor Request

The screenshot shows the 'Edit Contractor Request' form in the iProcurement system. The form is divided into several sections: 'Supplier Information', 'Rate and Budget Information', and 'Contractor Request'. The 'Supplier Information' section contains a table with two rows of supplier data. The first row is for 'AEROTEK INC' with site 'CHICAGO' and source document number '7202049753'. The second row is for 'O2WORKS LLC' with site 'DALLAS 2' and source document number '7202049747'. Both rows are checked. The 'Rate and Budget Information' section contains fields for 'Unit', 'Estimated Quantity', 'Target Rate (USD)', 'Labor Amount (USD)', and 'Expense Amount (USD)'. The 'Unit' is set to 'Hour', 'Estimated Quantity' is 200, 'Target Rate (USD)' is 50, 'Labor Amount (USD)' is 1000.00, and 'Expense Amount (USD)' is empty. The 'Contractor Request' section contains fields for 'Suggested Contractor First Name' and 'Suggested Contractor Last Name'. Callouts are present: 'Suggest a new supplier' points to the 'Suggest Supplier and Contractor' radio button; 'Use preferred suppliers if available' points to the 'Use Preferred Suppliers' radio button; 'Can also have predefined rates for a particular job - requires a global blanket agreement' points to the 'Rate Negotiable' checkbox; 'Discussion point - Do you know who you want to hire?' points to the 'Suggested Contractor First Name' field; and 'Enter target rate, units, and total budget. Also enter an expense amount if needed' points to the 'Target Rate (USD)' field.

Supplier Information

☒ Use Preferred Suppliers
☐ Suggest Supplier and Contractor

Select

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="checkbox"/>				
<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="checkbox"/>				

Rate and Budget Information

* Indicates required field

* Unit

Estimated Quantity

* Target Rate (USD)

* Labor Amount (USD)

Expense Amount (USD)

☐ Allow Rate Differential

Contractor Request

Suggested Contractor First Name

Suggested Contractor Last Name

Services Procurement - iProcurement

Edit Contractor Request

Edit Contractor Request

Supplier Information

☐ Use Preferred Suppliers
☒ Suggest Supplier and Contractor

Supplier **Contractor**

☐ New Supplier

Supplier Name: MANPOWER

Site: CHICAGO

Contact: Mingo, Christopher

Contact Phone:

Contact Email: Christopher.mingo@man

Contact Fax:

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

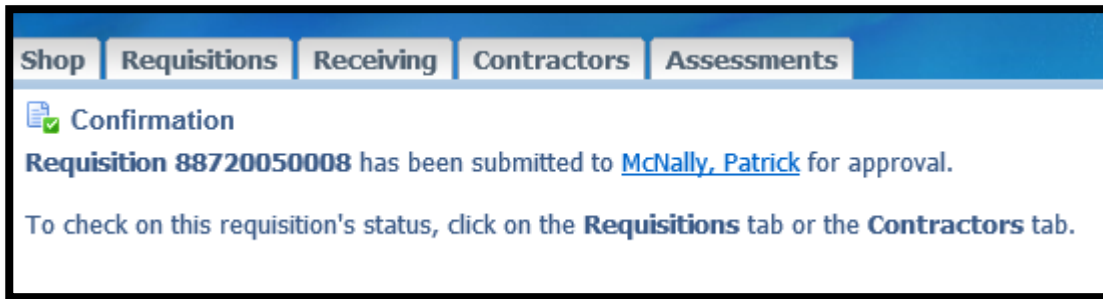
Shopping Cart

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**
To **INSIDE AEROTEK**
Sent **23-Jun-2016 11:24:05**
ID **59428057**

Company Name **Default enterprise name**
Requisition / Line **88720050008 / 1**
Attachments

OK

Reassign

More Information Request

Request Information

Job **Contractor**
Job Description **IT Contractor**
Suggested Contractor
Candidate Screening Required **Yes**

Start Date **30-Jun-2016**
End Date
Requester **Lewis, Michael**
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**
Target Rate (USD) **50**
Estimated Quantity (Hour) **200**
Allow Rate Differential **No**

Estimated Labor Amount (USD) **10000**

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

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

Copy To Cart

Cancel Requisition

Change

Assign Contractor

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

Cancel Apply

Supplier

Select Supplier pick supplier

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

Contractor

* Last Name enter name

First Name

Attach Resume

Schedule

* Start Date

End Date

Rate

* Unit

Estimated Quantity

Type	Minimum Rate Multiplier	Maximum Rate Multiplier	Agreed Rate Multiplier	Agreed Rate (USD)
Standard Rate				<input type="text" value="50"/>
Holiday Rate			<input type="text"/>	<input type="text"/>
Overtime Rate			<input type="text"/>	<input type="text"/>
Standby/On-Call Rate			<input type="text"/>	<input type="text"/>
Travel Rate			<input type="text"/>	<input type="text"/>
Weekend Rate			<input type="text"/>	<input type="text"/>

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

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

Amount

	Amount (USD)
Labor Amount	<input type="text" value="10000.00"/>
Expense Amount	<input type="text"/>

Notes

Note To Supplier

Cancel Apply

Services Procurement - iProcurement

➤ Create Contractor Assignment

Requester Information

Approval

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
	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**

* Indicates required field

* Line Type **Rate Based**

Job **Contractor**

* Description **IT Contractor**

Supplier Item

Cancel Actions Add Another Line Go Previous Line

Currency **USD**

Category **IT..**

Unit **Hour**

* Price **50**

Negotiated **No**

* Amount **10000.00**

Price Differentials

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

Add Another Row

Contractor **Work Details**

First Name **Sales**

Last Name **Susan**

* Start Date **30-Jun-2016**

End Date

Location **United States - Camas**

Organization **720**

Requester **Lewis, Michael**

Billing

PO Charge Account **720.66601.00000.51202.750.098.010**

Accrue at Receipt **No**

Match Approval Level **3-Way**

Invoice Match Option **PO(1)**

Invoice Close Tolerance (%) **1**

Project

Task

Expenditure Type

Expenditure Org

Expenditure Item Date

Source Document

Document **7202049747**

Document Style **Contract Purchase Agreement**

Ownning 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

i 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

United States

* Last Name

Susan

First Name

Sales

Date of Birth

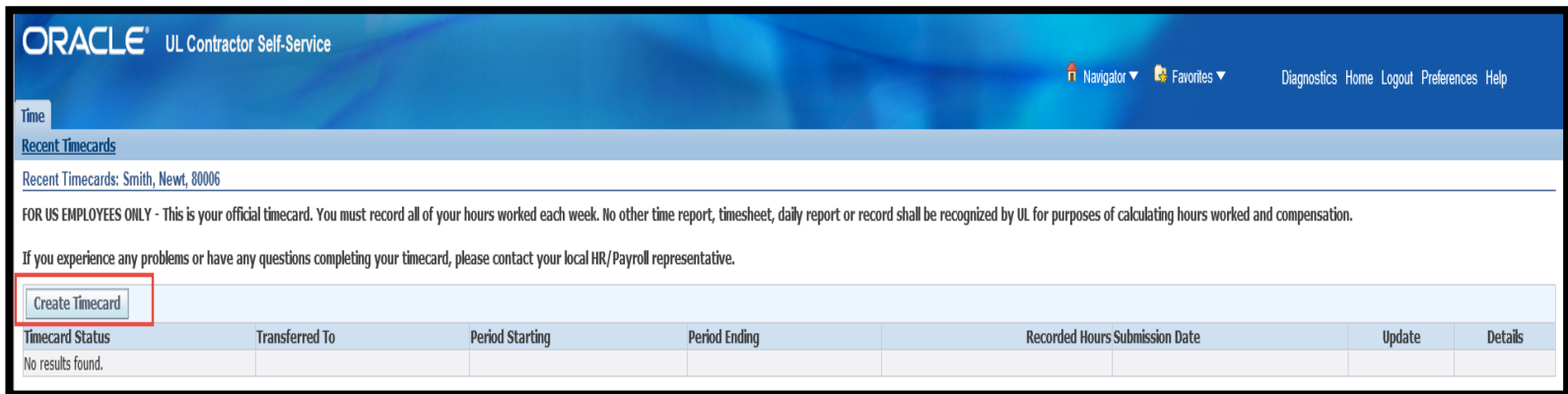
Social Security

* Start Date

23-Jun-2016

Services Procurement – Timecard Entry

➤ Create Timecard



The screenshot shows the Oracle UL Contractor Self-Service interface for Timecard Entry. The header includes the Oracle logo and "UL Contractor Self-Service". Navigation links include Navigator, Favorites, Diagnostics, Home, Logout, Preferences, and Help. The main content area is titled "Time" and "Recent Timecards". It displays "Recent Timecards: Smith, Newt, 80006". A notice 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." Below this, a message says: "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 shows "No results found."

Timecard Status	Transferred To	Period Starting	Period Ending	Recorded Hours Submission Date	Update	Details
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

Cancel Save Continue

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 ⓘ	<input type="text" value="4"/>	<input type="text" value="4"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	
Add Another Row Recalculate			0	0	0	0	0	0	0	0	

Cancel Save Continue

Services Procurement – Timecard Entry

➤ Import Timecard into Purchasing

Submit Request

Run this Request...

Copy...

NameRetrieve Time from OTL

Operating Unit

ParametersO2WORKS LLC:::

LanguageAmerican English

Language Settings...

Debug Options

At these Times...

ORACLE[®] Purchasing

RequisitionsOrdersAgreementsDeliverablesNegotiationsSuppliers

Orders > Standard Purchase Order > Line > Purchasing: Timecard Summary >

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 Amount	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

Payables Open Interface Import Report

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

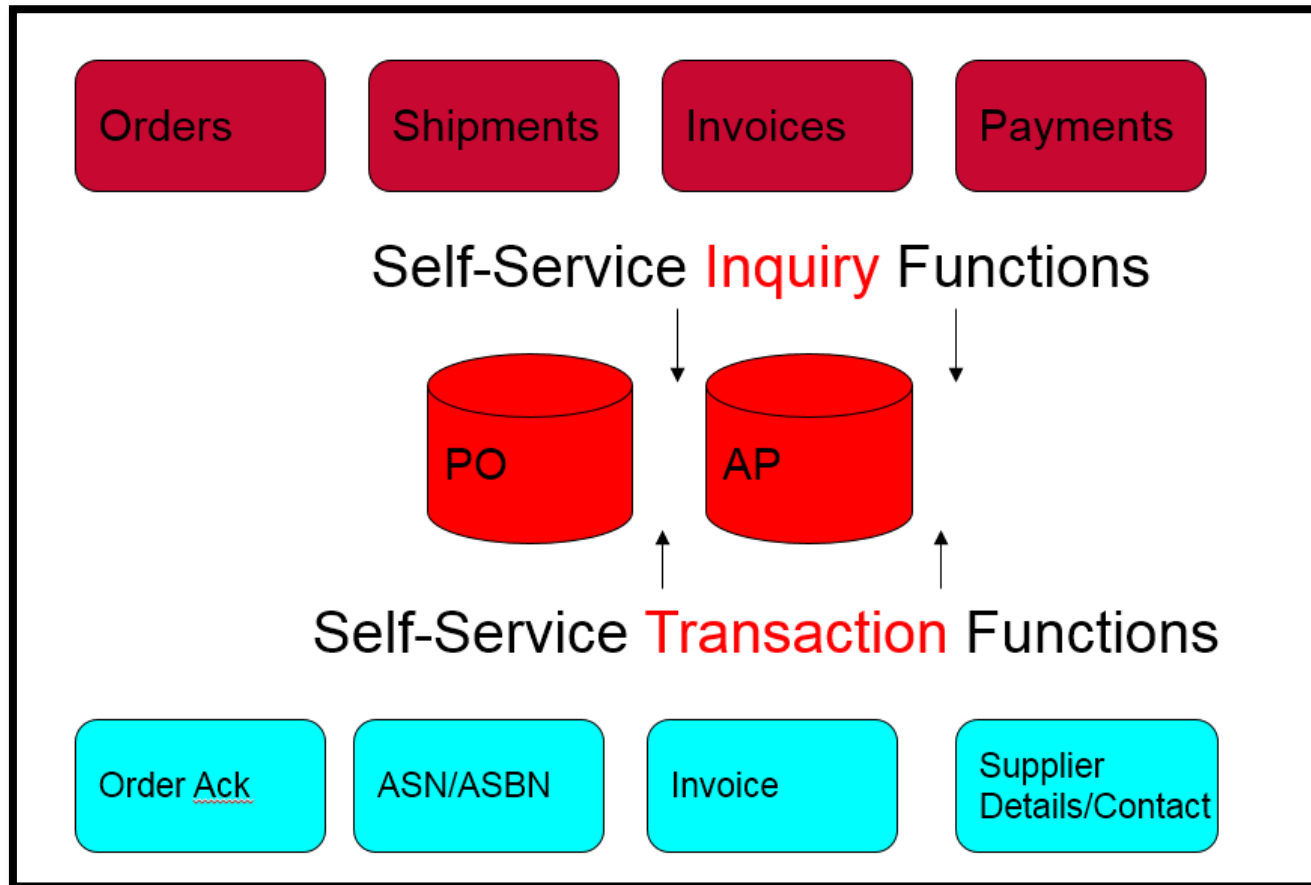
- Set PO: Enable Services Procurement to Yes
- Set POR : Rate Based Services Line Type to your Service line type
- Set POR: Contractor Expense Line Type to your Fixed Price line type



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 under 'Profile Management'. The 'General' tab is selected in the left-hand navigation menu. The main content area shows the 'General' profile information for the organization 'ACME' with a 'Supplier Number' of '133098'. Fields for 'DUNS Number', 'Tax Registration Number', 'Taxpayer ID', and 'Country of Tax Registration' are also visible. Below this is an 'Attachments' section and a 'Search' area with a text input field and a 'Go' button. At the bottom, there is an 'Add Attachment...' button and a table with columns: Title, Type, Description, Category, Last Updated By, Last Updated, Usage, Update, Delete, and Publish to Catalog. The table currently shows 'No results found.'

ORACLE

Home Orders Shipments Finance **Admin**

Navigator Favorites Home Logout Preferences Diagnostics

Profile Management

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

General

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

Attachments

Search

Note that the search is case insensitive
Title
[Show More Search Options](#)

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

Advanced Procurement – iSupplier Portal

➤ Address Book

The screenshot shows the Oracle iSupplier Portal interface. At the top, the Oracle logo is on the left, and navigation links (Navigator, Favorites, Home, Logout, Preferences, Help, Diagnostics) are on the right. Below the header, there's a tabbed menu with Home, Orders, Shipments, Finance, and Admin. The main content area is titled 'Profile Management' and contains a sidebar with a tree view of navigation options: General, Company Profile, Organization, Address Book (highlighted), Contact Directory, Business Classifications, Product & Services, Banking Details, Payment & Invoicing, and Surveys. The main panel shows the 'Address Book' section with a 'Create' button. Below this is a table with the following data:

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

Advanced Procurement – iSupplier Portal

Home Orders Shipments Finance Admin

Profile Management

General
Company Profile
Organization
Address Book
Contact
Directory
Business Classifications
Product & Services

Contact Directory : Active Contacts

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 Title
First Name Joe
Middle Name New
* Last Name User
Alternate Name
Job Title Sr. Sales
Department
Email Address JoeNew@acme.com
Uri

Phone Area Code
Phone Number
Phone Extension
Alternate Phone Area Code
Alternate Phone Number
Fax Area Code
Fax Number
Inactive Date (example: 28-Sep-2016 19:45:00)

User Account

Create User Account for this Contact ☒
* Supplier Name ACME
* Username JoeNew@acme.com

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
ACME

Site Restriction

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 left sidebar shows a navigation menu with 'Banking Details' highlighted. The main content area includes a table with the following data:

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase Priority	Decrease Priority	Status	Update
Show	XXXXXXXX6789			BANK OF TEXAS	08-Sep-2016		1	⬆	⬇	Approved	

Buttons for 'Add', 'Create', 'Update', 'Cancel', and 'Save' are visible. A red box highlights the 'Update' button in the table row.

➤ 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 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

ORACLE iSupplier Portal

Home Orders Shipments Finance Admin

Search PO Number Go

Navigator Favorites Home Logout Preferences Help

Notifications

[Full List](#)

Subject	Date
UL LLC - Standard Purchase Order 7202057131,0 requires your accep...	08-Sep-2016 10:54:39
UL LLC - Standard Purchase Order 7202057130,0 requires your accep...	08-Sep-2016 10:53:43
UL LLC - Standard Purchase Order 7202057129,0 requires your accep...	08-Sep-2016 10:53:00
UL LLC - Standard Purchase Order 7202057128,0 requires your accep...	08-Sep-2016 10:51:33
UL LLC - Standard Purchase Order 7202057127,0 requires your accep...	08-Sep-2016 10:50:21

Orders At A Glance

[Full List](#)

PO Number	Description	Order Date
7202057131		08-Sep-2016 10:53:53
7202057130		08-Sep-2016 10:53:02
7202057129		08-Sep-2016 10:52:17
7202057128		08-Sep-2016 10:51:23
7202057127		08-Sep-2016 10:50:17

Shipments At A Glance

[Full List](#)

Shipment Number	Packing Slip	Shipment Date
No results found.		

Orders

- [Agreements](#)
- [Purchase Orders](#)
- [Purchase History](#)

Shipments

- [Delivery Schedules](#)
- [Overdue Receipts](#)
- [Advance Shipment Notices](#)

Receipts

- [Receipts](#)
- [On-Time Performance](#)

Invoices

- [Invoices](#)

Payments

- [Payments](#)

Advanced Procurement – iSupplier Portal

➤ PO Data

The screenshot displays the Oracle iSupplier Portal interface. At the top, the Oracle logo and 'iSupplier Portal' text are visible. Navigation tabs include Home, Orders, Shipments, Finance, and Admin. A secondary navigation bar shows 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'. Below this is a 'Views' section with a dropdown menu set to 'All Purchase Orders' and a 'Go' button. An 'Advanced Search' button is also present. The main table lists purchase orders with columns for Select, PO Number, Rev, Operating Unit, Document Type, Description, Order Date, Buyer, Currency, Amount, Status, Acknowledge By, and Attachments. The table contains 10 rows of data, all for 'UL LLC' and 'Standard PO' documents, with various order dates and amounts. The bottom of the interface features another set of navigation tabs (Acknowledge, Request Cancellation, Request Changes, View Change History) and 'Multiple PO Change' and 'Export' buttons.

Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
<input type="radio"/>	Z202057131	0	UL LLC	Standard PO		08-Sep-2016 10:53:53	Lewis, Michael	USD	55.00	Requires Acknowledgment		
<input type="radio"/>	Z202057130	0	UL LLC	Standard PO		08-Sep-2016 10:53:02	Lewis, Michael	USD	70.00	Requires Acknowledgment		
<input type="radio"/>	Z202057129	0	UL LLC	Standard PO		08-Sep-2016 10:52:17	Lewis, Michael	USD	500.00	Requires Acknowledgment		
<input type="radio"/>	Z202057128	0	UL LLC	Standard PO		08-Sep-2016 10:51:23	Lewis, Michael	USD	1000.00	Requires Acknowledgment		
<input type="radio"/>	Z202057127	0	UL LLC	Standard PO		08-Sep-2016 10:50:17	Lewis, Michael	USD	77.70	Requires Acknowledgment		
<input type="radio"/>	Z202057126	0	UL LLC	Standard PO		08-Sep-2016 10:49:22	Lewis, Michael	USD	505.00	Requires Acknowledgment		
<input type="radio"/>	Z202057125	0	UL LLC	Standard PO		08-Sep-2016 10:46:11	Lewis, Michael	USD	1000.00	Open		
<input type="radio"/>	Z202057124	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"/>	Z202057123	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"/>	Z202057122	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"/>	Z202057121	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

The screenshot displays the Oracle iSupplier Portal interface for viewing a Purchase Order (PO). The browser address bar shows the URL: https://supplier-dev.ul.com/OA_HTML/OA.jsp?OAFunc=POS_VIEW_ORDER&PoHeaderId=%. The page title is "iSupplier Portal: View Order ...".

Navigation Menu: Home | Orders | Shipments | Finance | Admin

Order Information:

- Purchase Orders:** Agreements | View Requests | Work
- Orders: Purchase Orders >
- Standard Purchase Order: 7202057131, 0 (Total USD 55.00)
- Currency=USD

General Information:

- 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: Requires Acknowledgment
- 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

Supplier Information:

UL LLC
333 Pfingsten Road
Northbrook, 60062
United States

Supplier Address: ACME
1000 Beach 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 Info:

Customer Account No.	Supplier Site	Payment Terms	Freight Terms	Incoterms	Transportation	Ship Via
133095	24610N60	Prepaid	DESTINATION			

Confirm To/Telephone: Lewis, Mr. Michael +1 260 817 5533

Requester/Driver To: Lewis, Mr. Michael

Notes: 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/suppliers>. These terms and conditions are incorporated herein by reference.

Line Item Details:

Line	Part Number / Description	Delivery Date	Quantity	UOM	Unit Price (USD)	Qty. Discount	Amount (USD)
1	ACME Calibration Tools	15-SEP-2016	10	Each	5.5	Y	55.00

Ship To: Use the ship-to address at the top of page 1

Deliver To: Lewis, Mr. Michael (10)

Michael.L.Lewis@ul.com

Advanced Procurement – iSupplier Portal

➤ Receipt Data

[Home](#) | [Orders](#) | [Shipments](#) | [Finance](#) | [Admin](#)
[Delivery Schedules](#) | [Shipment Notices](#) | [Receipts](#) | [Overdue Receipts](#) | [On-Time Performance](#)

View Receipts Export

Simple Search

Receipt Number

Organization

PO Number

Item Number

Release Number

Supplier Item

Shipment Number

Item Description

Shipped Date

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		

Export

Advanced Procurement – iSupplier Portal

➤ Invoice Data

Home Orders Shipments Finance Admin
Create Invoices **View Invoices** View Payments
View InvoicesExport

Simple SearchAdvanced Search

Invoice Number

PO Number
(example : 1234)

Release Number
(example : 1234-2)

Payment Number

Invoice Status

Go

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	

Export

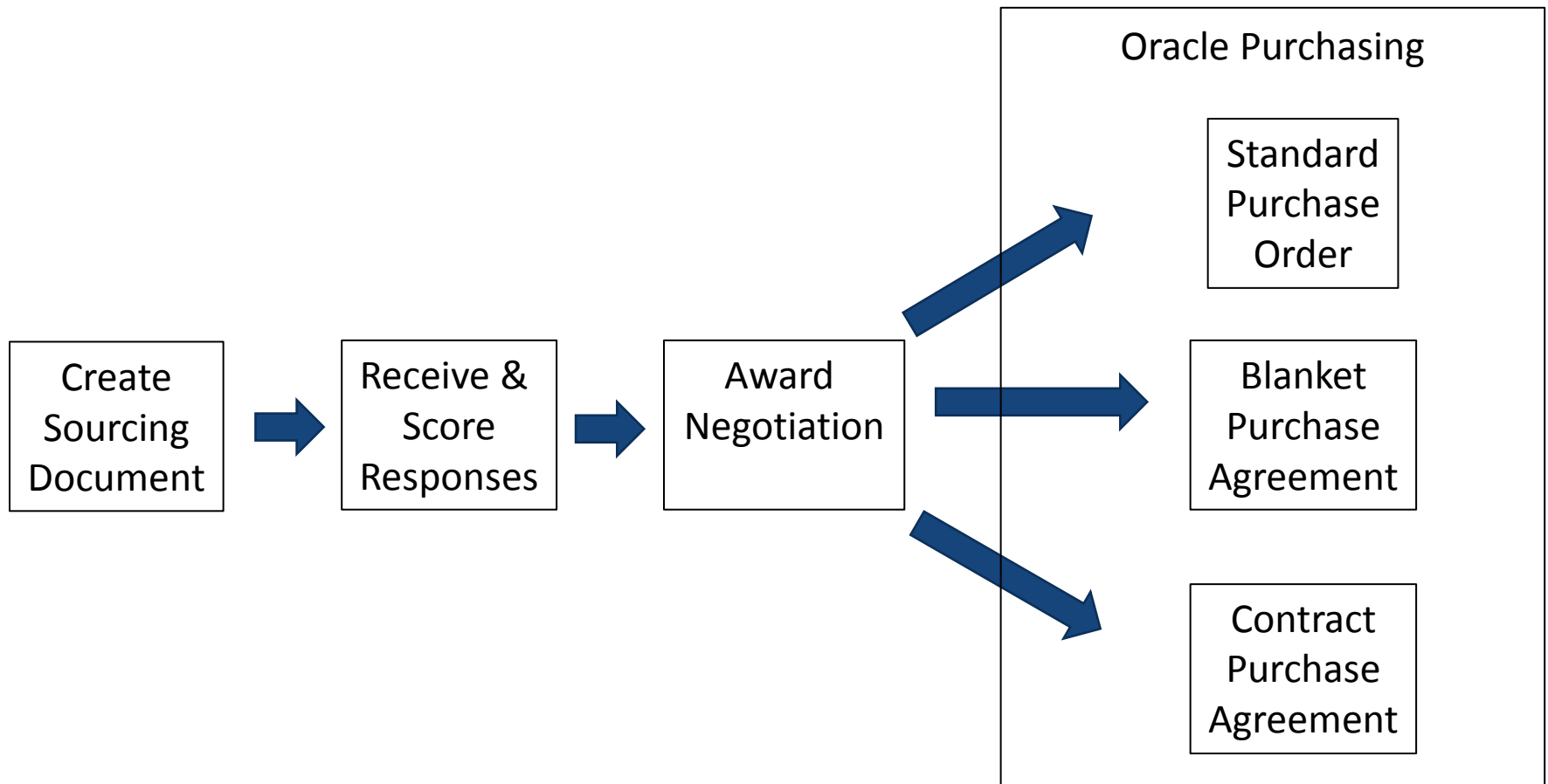


Sourcing

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

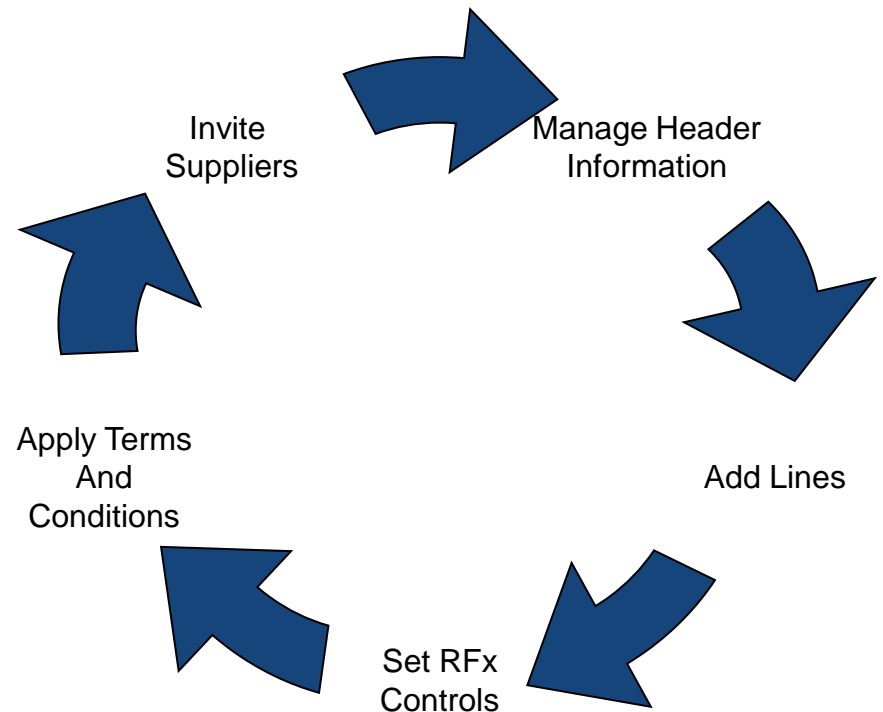
Advanced Procurement – Oracle Sourcing



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

Header

Confirmation
RFQ 1001 has been saved as a draft.

Create RFQ 1001: Header

* Indicates required field

* Title: Surfboard RFQ

Negotiation Style: Standard Negotiation

Quote Style: Blind

Event:

Security Level: Public

Sourcing Project:

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 All | Select None

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				

Add Another Row

Terms

* Bill-To Address: United States - Northbrook

* Ship-To Address: United States - Northbrook

Payment Terms: NET45

Carrier:

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"/>	<input type="checkbox"/> Requirements				
<input type="checkbox"/>	<input type="checkbox"/> General Information				✎
<input type="checkbox"/>	Insurance	Supplier Required	Yes	5	✎
<input type="checkbox"/>	Employee	Supplier Required	20	5	✎
<input type="checkbox"/>	<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

Sequence

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="Add Another Row"/>						<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"/>
<input type="button" value="Add Another Row"/>							

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

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

Requisitions Negotiations Intelligence Administration

Negotiations >

Create RFQ 1001: Suppliers

Header
Lines
Controls
Suppliers

Invited Suppliers

Add Invitation List Add Supplier

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

Indicates restricted access.

Advanced Procurement – Oracle Sourcing

➤ Invite Suppliers

- Search on detailed criteria or specific names

Requisitions | Negotiations | Intelligence | Administration

Suppliers: Add Suppliers (RFQ 1001)

Cancel Register New Supplier Apply

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](#)

Search Clear

Select Suppliers: **Add to Invited 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

⚠ Indicates supplier on purchase order hold

Cancel Register New Supplier Apply

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

ORACLE[®] Sourcing

Requisitions | **Negotiations** | Intelligence | Administration

Negotiations >

Suppliers: Register New Supplier
Registered supplier will be added to the invited suppliers list.
* Indicates required field

Supplier Name *

Address Name *

Country 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 *

Cancel Register Register and Approve

Cancel Register Register and Approve

Advanced Procurement – Oracle Sourcing

➤ Review

ORACLE Sourcing

RequisitionsNegotiationsIntelligenceAdministration

Create RFQ 1001: Review

CancelActionsSupplier Printable ViewGoSubmit For Approval

StatusDraft

TitleSurfboard RFQ

HeaderLinesControlsSuppliers

BuyerLewis, Mr. Michael

Negotiation StyleStandard Negotiation

Quote StyleBlind

Security LevelPublic

Sourcing Project

DescriptionRFQ to provide 10 Surfboards to UL for various beach projects

Approval StatusRequires Approval

Operating UnitUL LLC

OutcomeStandard Purchase Order

Event

Update

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 AddressUnited States - Northbrook

Ship-To AddressUnited States - Northbrook

FOBDestination

Payment TermsNET45

Carrier

Freight TermsPrepaid

Currency

RFQ CurrencyUSD

Price Precision2

Requirements

Display Scoring criteria to SuppliersNo

Show All DetailsHide 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 the Oracle Sourcing interface for a Request for Quotation (RFQ) titled "Request for Quotation 1001". The interface is split into two main sections: a document viewer on the left and a control panel on the right.

Document Viewer (Left):

- Title:** Surfboard RFQ
- Preview Date:** Immediately
- Open Date:** Immediately
- Close Date:** 01-JUN-2016 13:28:22
- Award Date:** 01-JUN-2016 13:28:23
- Time Zone:** Event Not Specified
- Note:** Not Specified

Please submit your response to:

- Company:** UL LLC
- Buyer:** Lewis, Mr. Michael
- Location:** UL LLC
- Address:** 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

Legal Notice: This document has important legal consequences. The information contained in this document is proprietary of UL LLC. It shall not be used, reproduced, or disclosed to others without the express and written consent of UL LLC.

Control Panel (Right):

- Actions:** Cancel, Supplier Printable View (selected), Go, Submit For Approval
- Status:** Draft
- Approval Status:** Requires Approval
- Operating Unit:** UL LLC
- Outcome:** Standard Purchase Order
- Event:**
- Update** button
- Task Table:**

Task	Target Date	Task Completed	Last Notified

Payment Terms: NET45

Carrier:

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

The screenshot shows the 'Terms and Conditions' window in Oracle Sourcing. The window has a blue header bar with tabs for 'Requisitions', 'Negotiations', 'Intelligence', and 'Administration'. Below the header, the breadcrumb 'Negotiations > RFQ: 1001 >' is visible. The main content area is titled 'Terms and Conditions' and contains the text: 'The following terms and conditions must be accepted before a quote is placed in this RFQ.' Below this text is a large text area with a scroll bar, containing the text: 'Please note that you are accepting the standard UL terms and conditions as attached in this document and responding as such.' To the right of the text area are 'Cancel' and 'Accept' buttons. Below the text area is an 'Attachments' section with a table. The table has columns: Title, Type, Description, Category, Last Updated By, Last Updated, Usage, Update, Delete, and Publish to Catalog. The table contains one row with the title 'Undefined', type 'Short Text', category 'To Supplier', last updated by 'UL52364', last updated '31-May-2016', usage 'One-Time', and icons for 'Update', 'Delete', and 'Publish to Catalog'. Below the table is a checkbox labeled '* I have read and accepted the terms and conditions'. At the bottom right of the window are 'Cancel' and 'Accept' buttons. The footer of the window contains the text 'Copyright (c) 2006, Oracle. All rights reserved.' and a navigation bar with links: 'Requisitions', 'Negotiations', 'Intelligence', 'Administration', 'Close Window', 'Preferences', 'Help', and 'Diagnostics'.

Requisitions > RFQ: 1001 >

Terms and Conditions

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

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

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)

Header | Lines

Title: Surfboard RFQ

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

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
<input type="checkbox"/> Requirements		
<input type="checkbox"/> General Information		
Insurance		YES ▾
Employee		300
<input type="checkbox"/> 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	Ship-To	Rank	Start Price	Target Price	Line Price	Quote Price	Total Score	Unit	Target Quantity	Quote Quantity	Promised Date
1		USD	2 decimals maximum	United States - Northbrook	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: Line 1 (RFQ 1001)

Description: Surfboards
Unit: Each
Start Price: 345.00
Target Price: 345.00
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

✓ TIP Total pay item amount must add up to the line amount.

Attributes

Total Score	Group	Attribute	Attribute Type	Target Value	Quote Value
5	General	White	Required		Yes

Notes

Note to Buyer:

Attachments

Add Attachment...

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

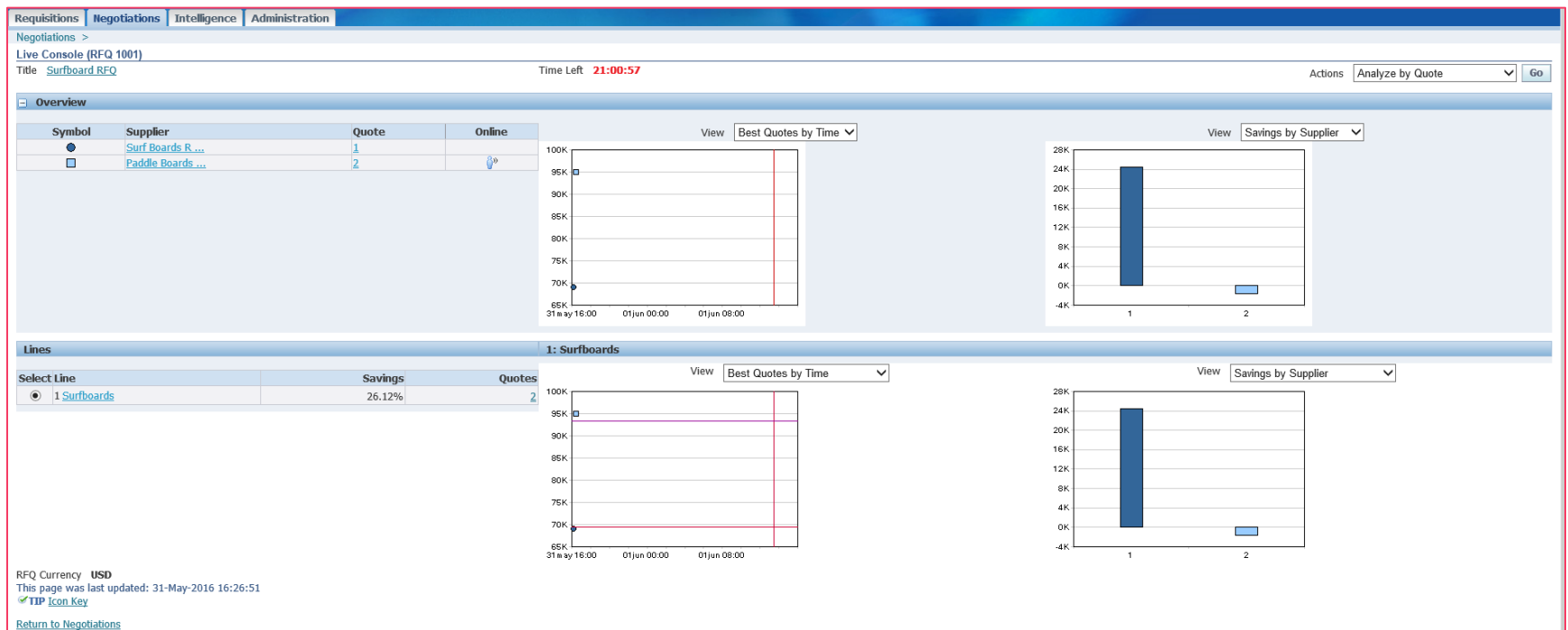
Cost Factors

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



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.