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## Training Guide

Oracle Training – iSupplier for End-Users

Jacksonville Aviation Authority (JAA)



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## Introduction

### Oracle iSupplier

Oracle iSupplier Portal is being deployed at JAA to enable suppliers to efficiently manage interaction and communication with the district for all purchasing activity. The portal provides a secure, Internet-based access point that enables direct and real-time access to purchasing and invoicing activity with JAA.

Suppliers access the latest information for their individual accounts, including:

- Purchase Orders
- Shipments and Shipment Notices
- Receipt information
- Delivery information
- Invoice and Payment status

The two-way collaboration enables suppliers to:

- Submit change requests
- Process shipment notices
- Create and submit invoices
- Update profile data

### Sourcing Supplier Portal

Registered suppliers will also have access to the Sourcing Supplier portal. This portal also provides a secure, Internet-based access point that enables direct and real-time access for responding to bid invitations and communicating directly with the JAA purchasing administration.

The Sourcing Supplier Portal enables suppliers to:

- Receive immediate notification of bid request invitations from JAA
- Complete and submit complete bid responses online
- Communicate through messaging directly with JAA purchasing administrators for any questions or information requests related to bid invitations and responses

**iSupplier  
Training Guide**



## Objectives

During this training course, supplier users will learn how to:

- Access the iSupplier portal and Home Page
- Use the Orders tab and related functions
- Use the Shipments tab and related functions
- Use the Finance tab and related functions
- Create and submit invoices
- Create and submit Advanced Shipment Notices
- Perform profile updates through the Admin tab
- Use the Sourcing responsibility to respond to bid requests and communicate directly with JAA purchasing administrators

## Topic 1: iSupplier Portal and Home Page Review

### Supplier Access and Account Setup

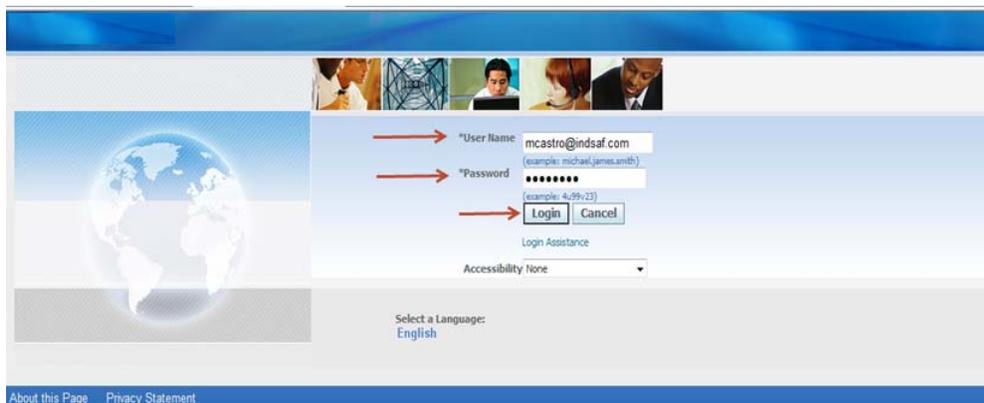
Approved supplier users will be registered at JAA for access to the iSupplier portal.

Registered suppliers will receive valid **UserID** and **Password** login credentials via email from designated JAA administrators. The email information will also include the appropriate **link** to the iSupplier login page for access.

This topic covers:

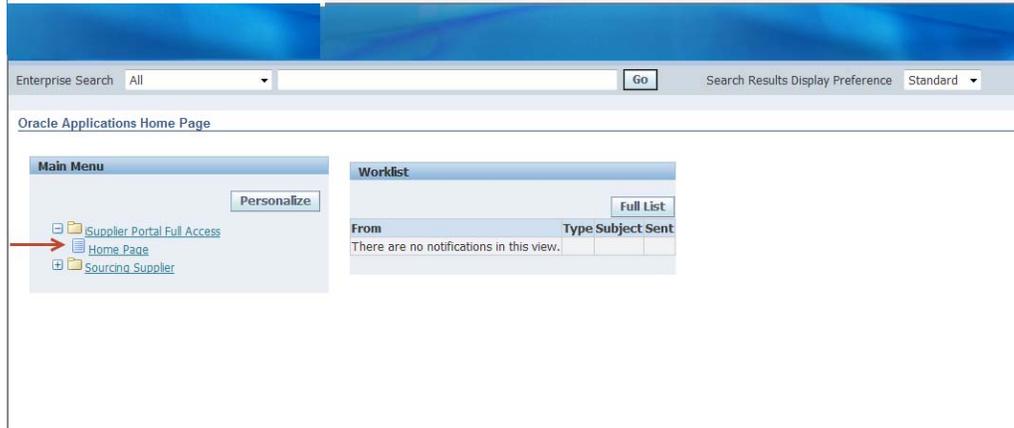
- Navigation to the iSupplier Home Page
- Review of Home Page elements

### iSupplier Login



The **Login** screen is displayed.

- 1- Enter assigned value in the **User Name** field.
- 2- Enter assigned value in the **Password** field.
- 3- Click the **Login** button.



The **Oracle Applications Home Page** is displayed.

- 4- Click the **Supplier Portal Full Access / Home Page** link.



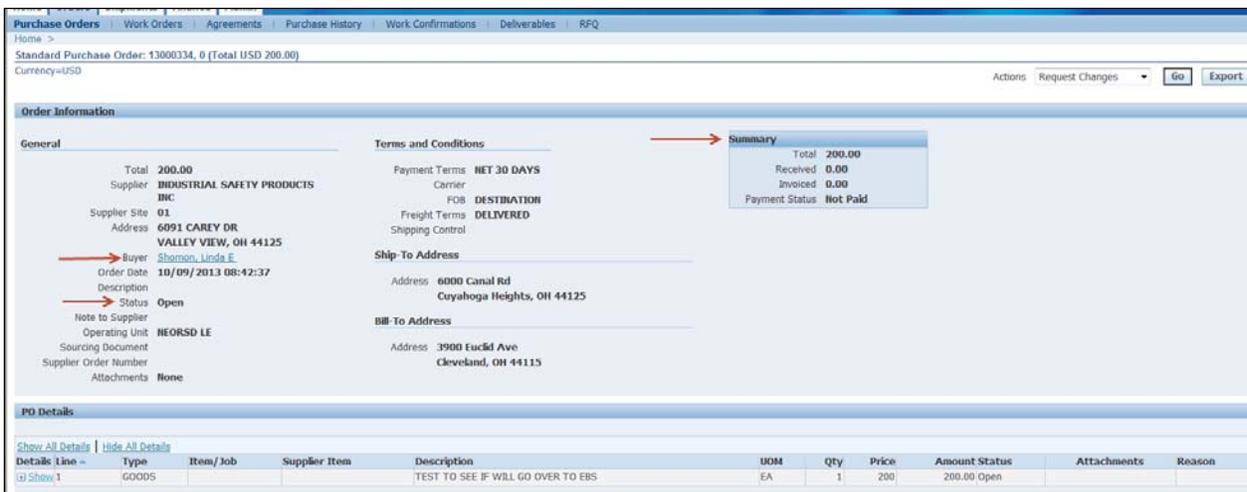
The **iSupplier Portal Home Page** is displayed.

- 5- Note the **Notifications** region of the screen. Notifications from JAA purchasing personnel will be received in this section.
- 6- Note the **Orders At A Glance** region of the screen. This region will always contain the five most recent purchase orders for immediate review, showing **PO Number, Description, and Order Date**.

Orders At A Glance		
PO Number	Description	Order Date
<a href="#">13000334</a>		10/09/2013 08:42:37
<a href="#">13000332</a>		10/08/2013 20:52:06
<a href="#">13000326</a>		10/08/2013 14:19:30
<a href="#">13000290</a>		10/07/2013 12:52:12
<a href="#">13000289</a>		10/07/2013 12:51:44

All purchase orders can be reviewed in **detail** from this region of the screen.

- 7- Click the **link** for the **PO Number** as indicated to drill down to the additional summary information.



**Order Information**

Standard Purchase Order: 13000334, 0 (Total USD 200.00)  
Currency=USD

**General**

Total: 200.00  
Supplier: INDUSTRIAL SAFETY PRODUCTS  
Supplier Site: IBC  
Supplier Address: 6091 CAREY DR, VALLEY VIEW, OH 44125  
Buyer: Shomron, Linda E  
Order Date: 10/09/2013 08:42:37  
Description: TEST TO SEE IF WILL GO OVER TO EBS  
Status: Open  
Note to Supplier: NEORSO LE  
Operating Unit: NEORSO LE  
Sourcing Document: None  
Supplier Order Number: None

**Terms and Conditions**

Payment Terms: NET 30 DAYS  
Carrier: FOS  
Freight Terms: DESTINATION  
Shipping Control: DELIVERED

**Summary**

Total: 200.00  
Received: 0.00  
Invoiced: 0.00  
Payment Status: Not Paid

**Ship-To Address**

Address: 6000 Canal Rd, Cuyahoga Heights, OH 44125

**Bill-To Address**

Address: 3900 Euclid Ave, Cleveland, OH 44115

**PO Details**

Details Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
1	GOODS			TEST TO SEE IF WILL GO OVER TO EBS	EA	1	200	200.00	Open		

The **Order Information** window is displayed.

- 8- Note the **Summary** information for the order.
- 9- Note the additional information shown, including **Buyer** and **Order Status**.



**PO Details**

Show All Details | Hide All Details

Details Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
1	GOODS			TEST TO SEE IF WILL GO OVER TO EBS	EA	1	200	200.00	Open		

Return to Home

The **PO Details** region of the window shows summary information for each line of the order.

- 10- Click the **Show** link to view additional shipment details for the order line.

**PO Details**

Show All Details | Hide All Details

Details Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
Hide 1	GOODS			TEST TO SEE IF WILL GO OVER TO EBS	EA	1	200	200.00	Open		

Shipments

Shipment	Ship-To Location	Ordered Qty	Received Qty	Involved Qty	Ordered Amount	Received Amount	Involved Amount	Invoice Promised Date	Need-By Date	Payment Status	Status	Supplier Line	Split	Reason	Attachments
1	Southerly Internal Location	1			200.00			10/30/2013 00:00:00	10/30/2013 00:00:00		Open				

Return to Home

Actions Request Changes Go Export

Home Orders Shipments Finance Admin Home Logout Preferences Help Diagnostics

The **Shipments** detail is shown, including the **Ship-To Location, Ordered Quantity, Promised Date, Need-By Date, and Status.**

11- Click the **Return to Home** link to return to the main page.

## Topic 2: iSupplier Home Page – Orders Tab

iSupplier portal users will have direct access to summary and detail information related to orders through the **Orders** tab. This tab also provides links to additional information pertaining to orders, including **PO Changes** and **Agreements**.

This topic covers:

- Overview of the Orders tab and summary information
- Review of views related to Purchase Orders
- Access to Purchase Agreements information

### Orders Tab – Summary Information



The **Home Page** is displayed.

1- Click on the **Orders** tab.

Home Orders Shipments Finance Admin

Purchase Orders Work Orders Agreements Purchase History Work Confirmations Deliverables RFQ

Purchase Orders

Multiple PO Change Export

Views

View All Purchase Orders Go Advanced Search

Select PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
13000224	0	NEORS LE	Standard PO		10/09/2013 08:42:37	Shomon, Linda E	USD	200.00	Open		
13000222	0	NEORS LE	Standard PO		10/08/2013 20:52:06	Shomon, Linda E	USD	100.00	Closed		
13000226	0	NEORS LE	Standard PO		10/08/2013 14:19:30	Shomon, Linda E	USD	17.55	Open		
13000290	0	NEORS LE	Standard PO		10/07/2013 12:52:12	Shomon, Linda E	USD	90.00	Open		
13000289	0	NEORS LE	Standard PO		10/07/2013 12:51:44	Shomon, Linda E	USD	100.00	Open		
13000227	0	NEORS LE	Standard PO		10/02/2013 13:33:14	Shomon, Linda E	USD	100.00	Closed		
13000235	0	NEORS LE	Standard PO		10/02/2013 10:52:36	Shomon, Linda E	USD	100.00	Open		
13000206	2	NEORS LE	Global Contract Agreement	sjdydsjydsjlv	10/02/2013 10:49:46	Shomon, Linda E	USD	1,000,000.00	Open		
13000224	0	NEORS LE	Standard PO		10/02/2013 09:43:21	Shomon, Linda E	USD	300.00	Open		

# iSupplier Training Guide



The **Purchase Orders** window is displayed. This window contains all purchase orders. Note the **links** for drilldown to each **PO Number** listed. The window displays 25 order listings at a time.

- 2- Use the **vertical scroll bar** to scroll down the list.
- 3- Click on the **Next 25** link to view the additional listings.

Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
<input type="radio"/>	13000084	0	NEORS LE	Standard PO	yhgtrfe	09/11/2013 20:29:34	Demmerle, Jennifer L.	USD	100.00	Closed		
<input type="radio"/>	13000063	0	NEORS LE	Standard PO		09/11/2013 20:06:45	Demmerle, Jennifer L.	USD	100.00	Closed		
<input type="radio"/>	13000062	0	NEORS LE	Standard PO	dvdsdvsv	09/11/2013 19:04:22	Demmerle, Jennifer L.	USD	100.00	Closed		
<input type="radio"/>	13000040	1	NEORS LE	Standard PO		09/10/2013 22:43:36	Demmerle, Jennifer L.	USD	201.96	Open		
<input type="radio"/>	13000053	0	NEORS LE	Standard PO		09/10/2013 22:31:16	Demmerle, Jennifer L.	USD	100.98	Open		
<input type="radio"/>	13000036	0	NEORS LE	Standard PO		09/10/2013 10:35:08	Demmerle, Jennifer L.	USD	10.87	Open		
<input type="radio"/>	13000029	0	NEORS LE	Global Blanket Agreement	test	09/09/2013 13:15:23	Demmerle, Jennifer L.	USD	10,000.00	Open		
<input type="radio"/>	13000024	0	NEORS LE	Standard PO		09/07/2013 16:02:29	Demmerle, Jennifer L.	USD	120.98	Open		
<input type="radio"/>	13000020	0	NEORS LE	Standard PO		09/06/2013 13:54:07	Demmerle, Jennifer L.	USD	10,009.80	Open		
<input type="radio"/>	13000018	0	NEORS LE	Standard PO		09/06/2013 11:25:27	Demmerle, Jennifer L.	USD	13.00	Open		
<input type="radio"/>	13000008	0	NEORS LE	Standard PO	VSSDL,VJDLV	09/05/2013 09:52:28	Demmerle, Jennifer L.	USD	1,010.00	Open		
<input type="radio"/>	13012	0	NEORS LE	Global Blanket Agreement	(WAM BPO) INV CONTROL - INDUSTRIAL GLOVES TWO-YEAR REQUIREMENT OR UNTIL APPROPRIATED FUNDS HAVE BEEN EXHAUSTED NO QUOTES REQUIRED	09/04/2013 16:28:01	Shomon, Linda E	USD	24,579.58	Open		

The window is refreshed to display the next 25 records.

- 4- Click on the **Previous 25** link to view the previous listings.

Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
<input type="radio"/>	13000334	0	NEORS LE	Standard PO		10/09/2013 08:42:37	Shomon, Linda E	USD	200.00	Open		
<input type="radio"/>	13000332	0	NEORS LE	Standard PO		10/08/2013 20:52:06	Shomon, Linda E	USD	100.00	Closed		
<input type="radio"/>	13000326	0	NEORS LE	Standard PO		10/08/2013 14:19:30	Shomon, Linda E	USD	17.55	Open		
<input type="radio"/>	13000290	0	NEORS LE	Standard PO		10/07/2013 12:52:13	Shomon, Linda E	USD	50.00	Open		
<input type="radio"/>	13000289	0	NEORS LE	Standard PO		10/07/2013 12:51:44	Shomon, Linda E	USD	100.00	Open		
<input type="radio"/>	13000282	0	NEORS LE	Standard PO		10/02/2013 13:33:14	Shomon, Linda E	USD	100.00	Closed		
<input type="radio"/>	13000275	0	NEORS LE	Standard PO		10/02/2013 10:52:36	Shomon, Linda E	USD	100.00	Open		
<input type="radio"/>	13000269	2	NEORS LE	Global Contract Agreement	sjdvjdyjvdydvj	10/02/2013 10:49:46	Shomon, Linda E	USD	1,000,000.00	Open		
<input type="radio"/>	13000234	0	NEORS LE	Standard PO		10/02/2013 09:43:21	Shomon, Linda E	USD	300.00	Open		
<input type="radio"/>	13000228	0	NEORS LE	Standard PO		10/02/2013 09:32:01	Demmerle, Jennifer L.	USD	200.98	Open		
<input type="radio"/>	13000226	0	NEORS LE	Standard PO		10/02/2013 07:58:03	Shomon, Linda E	USD	100.00	Closed		
<input type="radio"/>	13000225	0	NEORS LE	Standard PO		10/01/2013 14:53:23	Shomon, Linda E	USD	120.00	Closed		
<input type="radio"/>	13000223	0	NEORS LE	Standard PO		10/01/2013 13:50:13	Demmerle, Jennifer L.	USD	100.00	Closed		
<input type="radio"/>	13000222	0	NEORS LE	Standard PO		10/01/2013 12:50:06	Demmerle, Jennifer L.	USD	100.00	Closed		
<input type="radio"/>	13000217	0	NEORS LE	Standard PO		10/01/2013 11:24:49	Demmerle, Jennifer L.	USD	100.00	Open		
<input type="radio"/>	13000212	0	NEORS LE	Global Blanket Agreement	sfvsv	09/30/2013 16:48:37	Demmerle, Jennifer L.	USD	1,000.00	Open		
<input type="radio"/>	13000211	0	NEORS LE	Standard PO		09/30/2013 15:45:05	Demmerle, Jennifer L.	USD	10.00	Open		
<input type="radio"/>	13000210	0	NEORS LE	Standard PO		09/30/2013 15:44:40	Demmerle, Jennifer L.	USD	2.00	Open		
<input type="radio"/>	13000207	0	NEORS LE	Standard PO		09/30/2013 13:24:57	Demmerle, Jennifer L.	USD	100.00	Closed		

The order information is listed in sequence by the latest **Order Date**.

- 5- Click the indicator next to **Order Date** to reverse the sequence.

Purchase Orders

Views: All Purchase Orders

Select Order: Acknowledge Request Cancellation Request Changes View Change History

PO Select	Number	Rev	Unit	Operating	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	By	Acknowledge	Attachments
	13002522	0		NEORS	LE	Standard PO	09/04/2013 14:19:46	Sharon, Anthony	USD	16,582.00	Open			
	130113	0		NEORS	LE	Global Blanket Agreement	09/04/2013 16:28:01	Sharon, Linda	USD	24,579.58	Open			
	13000098	0		NEORS	LE	Standard PO	09/05/2013 09:52:28	Denmarck, Jennifer	USD	1,010.00	Open			
	13000018	0		NEORS	LE	Standard PO	09/06/2013 11:25:27	Denmarck, Jennifer	USD	13.00	Open			
	13000020	0		NEORS	LE	Standard PO	09/06/2013 13:54:07	Denmarck, Jennifer	USD	10,009.80	Open			
	13000024	0		NEORS	LE	Standard PO	09/07/2013 16:02:29	Denmarck, Jennifer	USD	120.98	Open			
	13000029	0		NEORS	LE	Global Blanket Agreement	09/09/2013 13:15:23	Denmarck, Jennifer	USD	10,000.00	Open			
	13000036	0		NEORS	LE	Standard PO	09/10/2013 10:35:08	Denmarck, Jennifer	USD	10.87	Open			
	13000033	0		NEORS	LE	Standard PO	09/10/2013 22:31:16	Denmarck, Jennifer	USD	100.98	Open			
	13000049	1		NEORS	LE	Standard PO	09/10/2013 22:43:36	Denmarck, Jennifer	USD	201.96	Open			
	13000052	0		NEORS	LE	Standard PO	09/11/2013 19:04:22	Denmarck, Jennifer	USD	100.00	Closed			

The order information is now listed in sequence by the earliest **Order Date**.

6- Click the indicator next to **Order Date** again to return to the original sequence.

## Utilizing Purchase Order View



Use the **View** function to narrow the order search.

1- Click the **Advanced Search** button.

**Advanced Search**

Specify parameters and values to filter the data that is displayed in your results set.

Show table data when all conditions are met.  
 Show table data when any condition is met.

PO Number is 13000020

Document Type is

Order Date is

Buyer is

Acknowledgement Status is

Go Clear Add Another Acknowledgement Status Add

The **Advanced Search** window is displayed. Note the multiple **parameters** available for search.

2- Enter a specific value in the **PO Number** field.

3- Click the **Go** button to execute the search.

**Advanced Search**

Specify parameters and values to filter the data that is displayed in your results set.  
 Show table data when all conditions are met.  
 Show table data when any condition is met.

PO Number is 13000020  
 Document Type is  
 Order Date is  
 Buyer is  
 Acknowledgement Status is

Go Clear Add Another Acknowledgement Status Add

Select Order: Acknowledge Request Cancellation Request Changes View Change History

Select PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
13000020		NEORSJ LE	Standard PO		09/06/2013 13:54:07	Demmerle, Jennifer L	USD	10,009.80	Open		

Search results are displayed.

- 4- Click the **PO Number** to view additional information for the order.

Standard Purchase Order: 13000020, 0 (Total USD 10,009.80)  
 Currency=USD

**Order Information**

**General**  
 Total 10,009.80  
 Supplier INDUSTRIAL SAFETY PRODUCTS INC  
 Supplier Site 01  
 Address 6091 CAREY DR VALLEY VIEW, OH 44125  
 Buyer Demmerle, Jennifer L  
 Order Date 09/06/2013 13:54:07  
 Description  
 Status Open  
 Note to Supplier  
 Operating Unit NEORSJ LE  
 Sourcing Document  
 Supplier Order Number  
 Attachments None

**Terms and Conditions**  
 Payment Terms NET 30 DAYS  
 Carrier  
 FOB DESTINATION  
 Freight Terms DELIVERED  
 Shipping Control

**Ship-To Address**  
 Address 6000 Canal Rd Cuyahoga Heights, OH 44125

**Bill-To Address**  
 Address 3900 Euclid Ave Cleveland, OH 44115

**Summary**  
 Total 10,009.80  
 Received 10,009.80  
 Invoiced 5,003.92  
 Payment Status Not Paid

**Actions**  
 Request Changes  
 Request Changes  
 Request Cancellation  
 View Change History  
 View PDF  
 View Receipts  
 View Invoices  
 View Payments  
 View Shipments

Go Export

**PO Details**

Show All Details Hide All Details

Details Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
Show 1	GOODS	014455		BALLAST HIGH PRESSURE SODIUM FOR 150 WATT LAMPS 277 VOLT ADVANCE #71A8172001D	EA	10	1000.98	10,009.80	Open		

The **Order Information** window is displayed. Note the **Actions** box with multiple options for viewing additional information related to the order.

- 5- Select the **View Change History** value.
- 6- Click the **Go** button.

Orders: Purchase Orders > View Order Details >  
 Change History for Order  
 Currency=USD

Indicates now values  
 Indicates cancellation

Details Request Date	Line	Shipment	Item	Item	Supplier	Description	Qty	UOM	Rate	Price / Amount	Promised Date	Recd-By Date	Start Date	End Date	Supplier Order Number	Supplier Order Line Number	Additional Changes	Cancellation Split Request	Response
No results found.																			

Return to View Order Details

Home Orders Shipments Finance Admin Home Logout Preferences Diagnostics

About this Page Privacy Statement Copyright (c) 2000, Oracle. All rights reserved.

All **Change Order** history is displayed for the order.

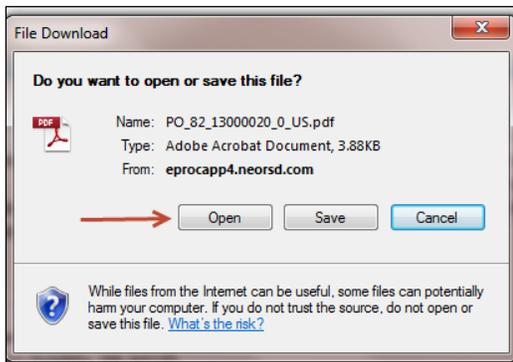
- 7- Click the **Ok** button to close the window.

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Returning to the **Actions** box:

- 8- Select the **View PDF** value.
- 9- Click the **Go** button.



The **File Download** window is displayed.

- 10- Click the **Open** button.

A **PDF** copy of the order is displayed. Use this copy for printing or save to desktop.

- 11- Use the **File>Exit** command to exit from the PDF document.

## Topic 3: iSupplier Home Page – Shipments Tab

iSupplier portal users will have direct access to multiple levels of shipment information through the **Shipments** tab. This tab also provides links to additional information pertaining to shipments, including **Receipts**, **Returns**, and **Performance**.

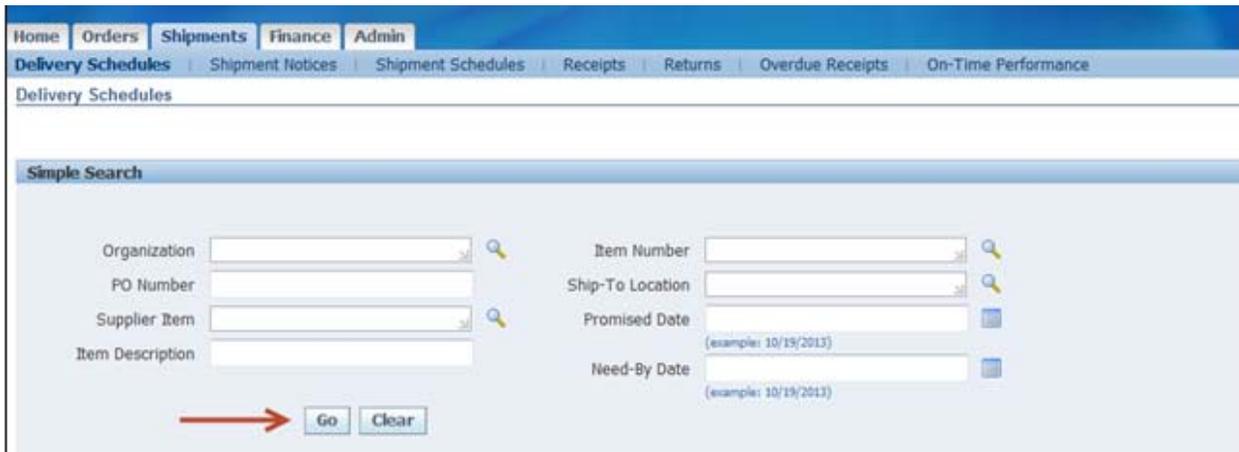
This topic covers:

- Overview of the Shipments tab and summary information
- Review of Shipment Receipts details
- Review of Shipment Returns details
- Review of Overdue Receipts details
- Review of On-Time Performance metrics

### Shipments Tab – Summary Information

The **Home Page** is displayed.

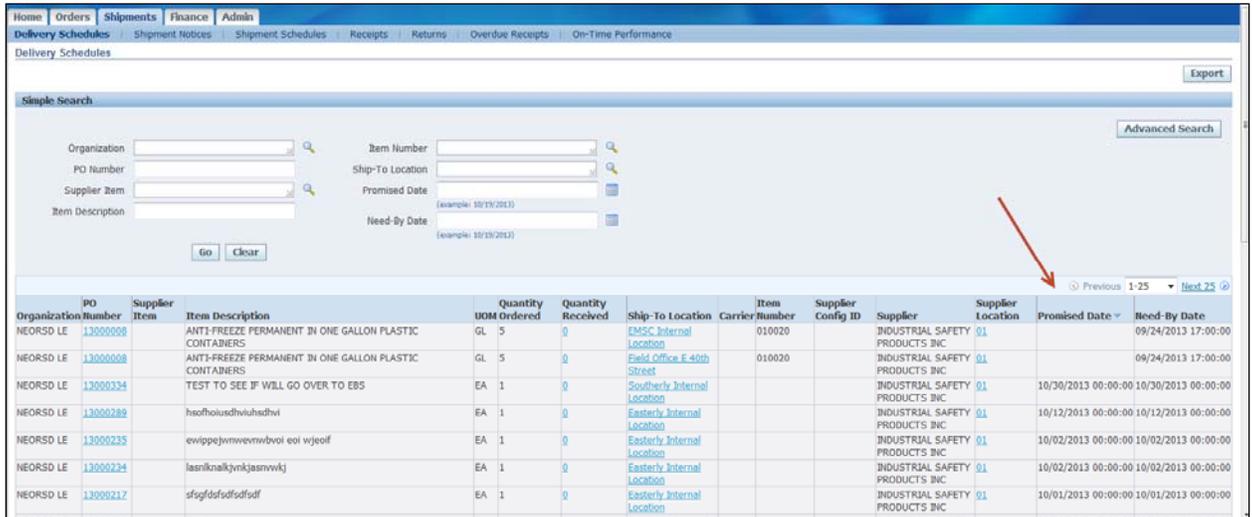
- 1- Click on the **Shipments** tab.



The screenshot shows the iSupplier portal interface. At the top, there are navigation tabs: Home, Orders, Shipments, Finance, and Admin. The 'Shipments' tab is selected. Below the navigation tabs, there are sub-tabs: Delivery Schedules, Shipment Notices, Shipment Schedules, Receipts, Returns, Overdue Receipts, and On-Time Performance. The 'Delivery Schedules' sub-tab is active. Below the sub-tabs, there is a 'Simple Search' section with several input fields: Organization, PO Number, Supplier Item, Item Description, Item Number, Ship-To Location, Promised Date, and Need-By Date. There are also 'Go' and 'Clear' buttons at the bottom of the search section. A red arrow points to the 'Go' button.

The **Delivery Schedules** window is the default window displayed under this tab. Use this window to search for delivery schedule information using multiple criteria.

- 2- To search for **all** delivery schedules, click the **Go** button.



Delivery Schedules

Simple Search

Organization:  Item Number:   
 PO Number:  Ship-To Location:   
 Supplier Item:  Promised Date:  (example: 10/19/2013)  
 Item Description:  Need-By Date:  (example: 10/19/2013)

Go Clear

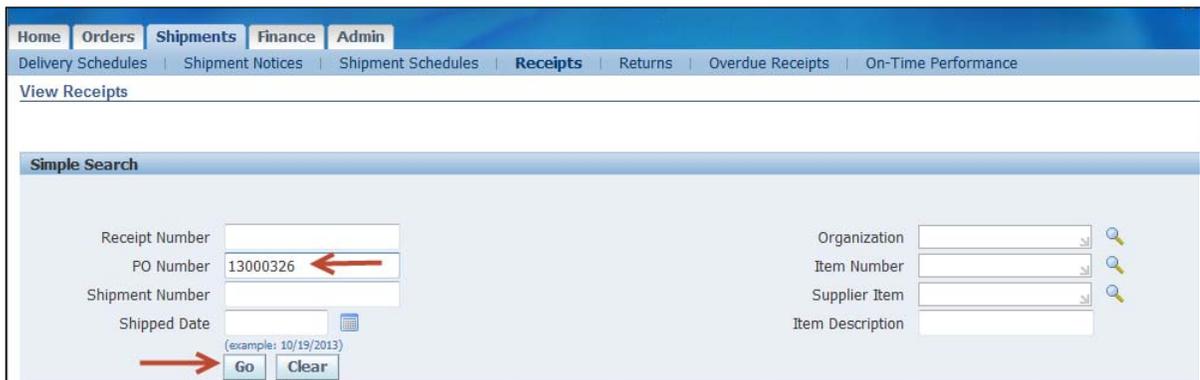
Organization	PO Number	Supplier Item	Item Description	Quantity Ordered	Quantity Received	Ship-To Location	Carrier Number	Item Number	Supplier Config ID	Supplier	Supplier Location	Promised Date	Need-By Date
NEORSO LE	13000008		ANTS FREEZE PERMANENT IN ONE GALLON PLASTIC CONTAINERS	GL 5	0	EMSC Internal Location		010020		INDUSTRIAL SAFETY PRODUCTS INC	01		09/24/2013 17:00:00
NEORSO LE	13000008		ANTS-FREEZE PERMANENT IN ONE GALLON PLASTIC CONTAINERS	GL 5	0	Field Office E-40th Street		010020		INDUSTRIAL SAFETY PRODUCTS INC	01		09/24/2013 17:00:00
NEORSO LE	13000234		TEST TO SEE IF WILL GO OVER TO EBS	EA 1	0	Southerly Internal Location				INDUSTRIAL SAFETY PRODUCTS INC	01	10/30/2013 00:00:00	10/30/2013 00:00:00
NEORSO LE	13000289		hsfohoiusdhviusdhvi	EA 1	0	Easterly Internal Location				INDUSTRIAL SAFETY PRODUCTS INC	01	10/12/2013 00:00:00	10/12/2013 00:00:00
NEORSO LE	13000235		ewippejymwvnmvboi eoi wjeoif	EA 1	0	Easterly Internal Location				INDUSTRIAL SAFETY PRODUCTS INC	01	10/02/2013 00:00:00	10/02/2013 00:00:00
NEORSO LE	13000234		lasriknalkynkjasmvwkj	EA 1	0	Easterly Internal Location				INDUSTRIAL SAFETY PRODUCTS INC	01	10/02/2013 00:00:00	10/02/2013 00:00:00
NEORSO LE	13000217		sfqfdfsdfsdf	EA 1	0	Easterly Internal Location				INDUSTRIAL SAFETY PRODUCTS INC	01	10/01/2013 00:00:00	10/01/2013 00:00:00

The **Delivery Schedules** window shows search results in summary.

- 3- Note the multiple fields of information, included comparison of **Promised Date** and **Need-By Date**.

## Shipment Receipt Details

- 1- Click the **Receipts** link under the **Shipments** tab.



View Receipts

Simple Search

Receipt Number:   
 PO Number: 13000326  
 Shipment Number:   
 Shipped Date:  (example: 10/19/2013)

Organization:   
 Item Number:   
 Supplier Item:   
 Item Description:

Go Clear

The **View Receipts** window is displayed. Multiple search criteria are available for query.

- 2- Enter the **PO Number** value.
- 3- Click the **Go** button.

# iSupplier Training Guide



Home Orders **Shipments** Finance Admin

Delivery Schedules | Shipment Notices | Shipment Schedules | **Receipts** | Returns | Overdue Receipts | On-Time Performance

View Receipts

---

**Simple Search**

Receipt Number

PO Number 13000326

Shipment Number

Shipped Date  (example: 10/19/2013)

Organization

Item Number

Supplier Item

Item Description

Go Clear

Receipt	Creation Date	Organization	Shipment	Shipped Date	Packing Slip	Containers	Waybill/ Airbill	Freight Carrier
<a href="#">36</a>	10/19/2013 13:38:08	Easterly						

Search results are displayed.

- 4- Click the **link** for the **Receipt Number** to view detail information.

Shipments: Receipts >  
Receipt: 36

Creation Date 10/19/2013 13:38:08  
Organization Easterly  
Supplier INDUSTRIAL SAFETY PRODUCTS INC  
Supplier Site 01  
Shipment Number  
Shipment Date

Packing Slip  
Containers  
Waybill/Airbill  
Freight Carrier  
Bill of Lading  
Attachments None

Receipt Transactions

Receipt Date	Promised Date	Need-By Date	Performance	PO Number	Line	Shipment	Item/Job Description	UOM	Ordered	Returned	Net Received	Defects	Location	Attachments	LPH/Lot/Serial Invoice
10/19/2013 13:37:46	10/21/2013 17:00:00	10/21/2013 17:00:00	On-Time	13000326	1	1	278802 GLOVES WELDERS, PREMIUM GRADE COW LEATHER, LARGE MIGHTY WING THUMB 4.5" GAUNTLET SPLIT COW CUFF, MCR MUSTANG 4950L *NO SUBSTITUTION OF SPECIFICATIONS*	PR	2		2		Lossery Internal Location		

Return to Shipments: Receipts

Detail information for the receipt is displayed. Note the inclusion of **Performance** and **Net Received** information for the receipt.

- 5- Click the **Return to Shipments, Receipts** link.

## Shipment Returns Detail

Home Orders **Shipments** Finance Admin

Delivery Schedules | Shipment Notices | Shipment Schedules | **Receipts** | **Returns** | Overdue Receipts | On-Time Performance

View Receipts

---

**Simple Search**

Receipt Number

PO Number 13000326

Shipment Number

Shipped Date  (example: 10/19/2013)

Organization

Item Number

Supplier Item

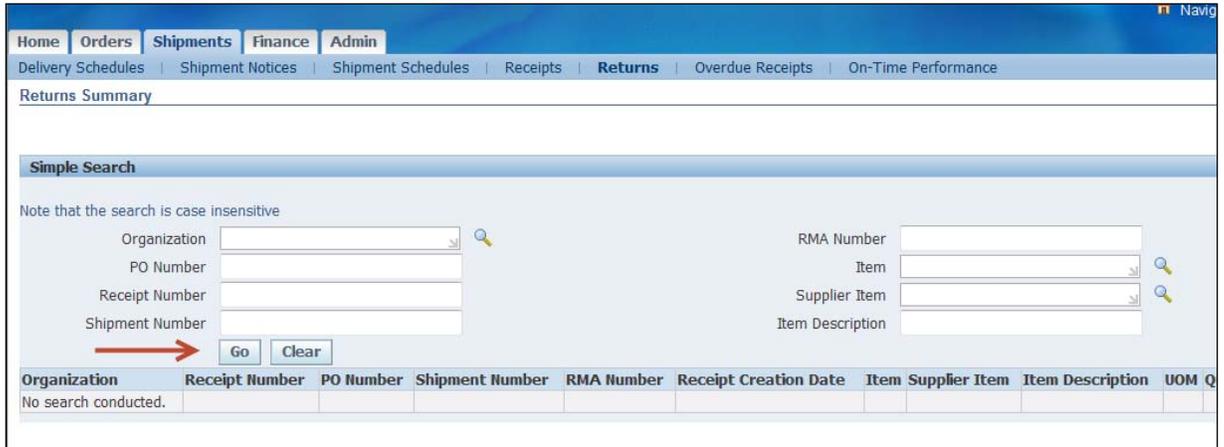
Item Description

Go Clear

Receipt	Creation Date	Organization	Shipment	Shipped Date	Packing Slip	Containers	Waybill/ Airbill	Freight
<a href="#">36</a>	10/19/2013 13:38:08	Easterly						

Receipts Summary

- 1- Click the **Returns** link under the **Shipments** tab.



Home Orders Shipments Finance Admin

Delivery Schedules | Shipment Notices | Shipment Schedules | Receipts | **Returns** | Overdue Receipts | On-Time Performance

Returns Summary

Simple Search

Note that the search is case insensitive

Organization  RMA Number

PO Number  Item

Receipt Number  Supplier Item

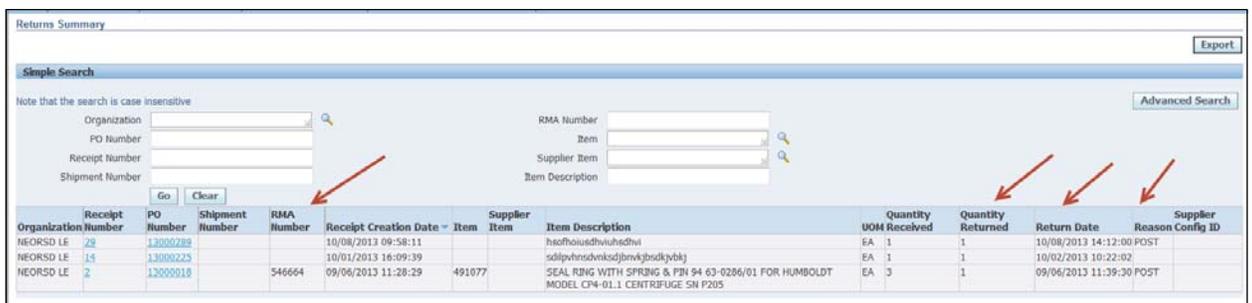
Shipment Number  Item Description

Go Clear

Organization	Receipt Number	PO Number	Shipment Number	RMA Number	Receipt Creation Date	Item	Supplier Item	Item Description	UOM	Q
No search conducted.										

The **Returns Summary** window is displayed. Multiple search criteria are available for query.

2- To view **all** returns information, click the **Go** button.



Returns Summary

Simple Search

Note that the search is case insensitive

Organization  RMA Number

PO Number  Item

Receipt Number  Supplier Item

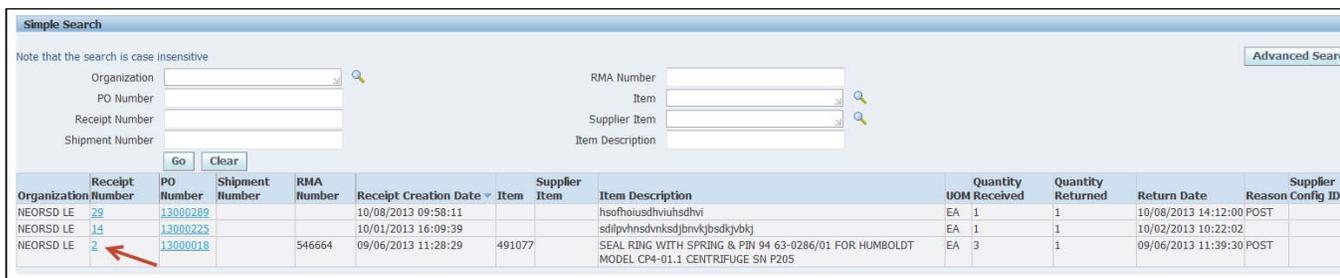
Shipment Number  Item Description

Go Clear

Organization	Receipt Number	PO Number	Shipment Number	RMA Number	Receipt Creation Date	Item	Supplier Item	Item Description	Quantity UOM Received	Quantity Returned	Return Date	Reason	Supplier Config ID
NEORSO LE	29	13000289			10/08/2013 09:58:11			hsfohoiusdthvuhdsdthvi	EA 1	1	10/08/2013 14:12:00	POST	
NEORSO LE	14	13000225			10/01/2013 16:09:39			sdilpvhnsdvnksdjbvnkjbsdqybkj	EA 1	1	10/02/2013 10:22:02		
NEORSO LE	2	13000018		546664	09/06/2013 11:28:29	491077		SEAL RING WITH SPRING & PIN 94 63-0286/01 FOR HUMBOLDT MODEL CP4-01.1 CENTRIFUGE SN P205	EA 3	1	09/06/2013 11:39:30	POST	

In the search results, detail information for the return is displayed.

3- Note the inclusion of **RMA Number**, **Quantity Returned**, **Return Date**, and **Reason** information for each return.



Simple Search

Note that the search is case insensitive

Organization  RMA Number

PO Number  Item

Receipt Number  Supplier Item

Shipment Number  Item Description

Go Clear

Organization	Receipt Number	PO Number	Shipment Number	RMA Number	Receipt Creation Date	Item	Supplier Item	Item Description	Quantity UOM Received	Quantity Returned	Return Date	Reason	Supplier Config ID
NEORSO LE	<a href="#">29</a>	13000289			10/08/2013 09:58:11			hsfohoiusdthvuhdsdthvi	EA 1	1	10/08/2013 14:12:00	POST	
NEORSO LE	<a href="#">14</a>	13000225			10/01/2013 16:09:39			sdilpvhnsdvnksdjbvnkjbsdqybkj	EA 1	1	10/02/2013 10:22:02		
NEORSO LE	<a href="#">2</a>	13000018		546664	09/06/2013 11:28:29	491077		SEAL RING WITH SPRING & PIN 94 63-0286/01 FOR HUMBOLDT MODEL CP4-01.1 CENTRIFUGE SN P205	EA 3	1	09/06/2013 11:39:30	POST	

4- Click the **link** for any **Receipt Number** to view detail information.

Shipments: Returns >  
Receipt Transactions

Receipt Number	PO	Line	Shipment	Description	UOM	Ordered	Returned	Net Received	Defects	Location	Receipt Date	Promised Date	Need-By Date	Performance
2	13000018	1	1	SEAL RING WITH SPRING & PIN 94 63-0286/01 FOR HUMBOLDT MODEL CP4-01.1 CENTRIFUGE SN P205	EA	10	1.0	1		<a href="#">Westerly Internal Location</a>	09/06/2013 11:27:22	09/08/2013 17:00:00	09/08/2013 17:00:00	On-Time

[Return to Shipments: Returns](#) ←

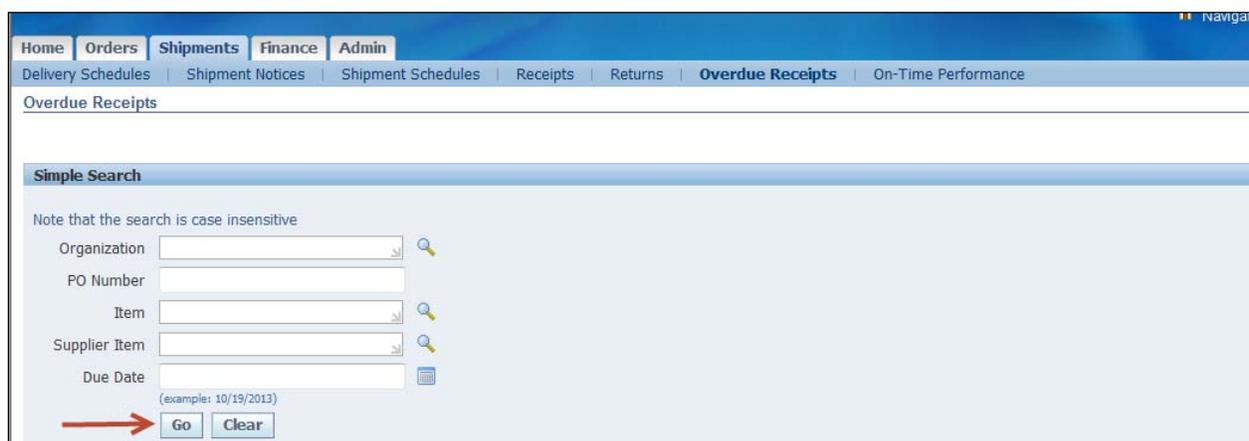
Detail information for the return is displayed.

- 5- Click the **Return to Shipments, Returns** link.

## Overdue Receipts Detail



- 1- Click the **Overdue Receipts** link under the **Shipments** tab.



The screenshot shows the 'Overdue Receipts' search interface. It includes a 'Simple Search' section with the following fields: Organization, PO Number, Item, Supplier Item, and Due Date (with an example of 10/19/2013). There are 'Go' and 'Clear' buttons at the bottom. A red arrow points to the 'Go' button.

The **Overdue Receipts** window is displayed. Multiple search criteria are available for query.

- 2- To view **all** overdue receipts, click the **Go** button.

Organization	PO Number	Item	Supplier Item	Item Description	Due Date	UOM Ordered	Quantity Received	Ship-To Location	Carrier Buyer	Supplier Config ID
NEORS LE	13000289			hszfohdshvshsdhvi	10/12/2013 00:00:00 EA	1	0	Easterly Internal Location	Shomon, Linda E	
NEORS LE	13000245			ewippejmmvnrwboi eoi wjeof	10/02/2013 00:00:00 EA	1	0	Easterly Internal Location	Shomon, Linda E	
NEORS LE	13000234			lasmnkalkymjasmvwtj	10/02/2013 00:00:00 EA	1	0	Easterly Internal Location	Shomon, Linda E	
NEORS LE	13000217			efsgfdsdffsdff	10/01/2013 00:00:00 EA	1	0	Easterly Internal Location	Demmeria, Jennifer L	
NEORS LE	13000036			Testing accounts	09/30/2013 17:00:00 EA	1	0	Southerly Internal Location	Demmeria, Jennifer L	
NEORS LE	13000210			00000	09/30/2013 00:00:00 EA	1	0	Southerly Internal Location	Demmeria, Jennifer L	
NEORS LE	13000211			test test	09/30/2013 00:00:00 EA	1	0	Admin Svcs Internal Location	Demmeria, Jennifer L	
NEORS LE	13000008	010020		ANTI-FREEZE PERMANENT IN ONE GALLON PLASTIC CONTAINERS	09/24/2013 17:00:00 GL	5	0	Field Office E 4th Street	Demmeria, Jennifer L	
NEORS LE	13000008	010020		ANTI-FREEZE PERMANENT IN ONE GALLON PLASTIC CONTAINERS	09/24/2013 17:00:00 GL	5	0	EMSC Internal Location	Demmeria, Jennifer L	
NEORS LE	13000003	391133		EPOXY PRIMER PART A	09/15/2013 17:00:00 GL	6	0	Administration Euclid Ave	Demmeria, Jennifer L	
NEORS LE	13000003	137031		CLOTH DROP 12' X 15' CANVAS 8-OZ HEAVY WEIGHT FOR PAINTERS, TRIMCO #58903	09/15/2013 17:00:00 EA	5	0	Administration Euclid Ave	Demmeria, Jennifer L	
NEORS LE	13000006	002626		ADAPTER BRASS FIRE HOSE SWIVEL STYLE 1 1/2" FEMALE CLEVE FIRE DEPT THRD X 1 1/2" FEMALE NPT --- DDON #DFP15F155	09/11/2013 17:00:00 EA	1	0	Easterly Internal Location	Demmeria, Jennifer L	
NEORS LE	13000003			hifsdghdhrighdflklklf	09/11/2013 00:00:00 EA	1	0	Easterly Internal Location	Demmeria, Jennifer L	
NEORS LE	13000018	491077		SEAL RING WITH SPRING & PIN 94 63-0286/01 FOR HUMBOLDT MODEL CP4-01.1 CENTRIFUGE SH P205	09/08/2013 17:00:00 EA	10	1	Woodsley Internal Location	Demmeria, Jennifer L	
NEORS LE	13000019	BIGMONEY-1		2HP MOTOR	09/08/2013 17:00:00 EA	3	0	Southerly Internal Location	Demmeria, Jennifer L	
NEORS LE	13000024			edghfd	09/08/2013 00:00:00 EA	1	0	Easterly Internal Location	Demmeria, Jennifer L	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	1	0	EMSC Internal Location	Brooks, Antwane	

Search results are listed by **PO Number**, with latest **Due Date** listed first.

3- Click the indicator next to **Due Date** to change the sequence.

Organization	PO Number	Item	Supplier Item	Item Description	Due Date	UOM Ordered	Quantity Received	Ship-To Location	Carrier Buyer	Supplier Config ID
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	4	0	EMSC Internal Location	Brooks, Antwane	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	6	0	EMSC Internal Location	Brooks, Antwane	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	1	0	EMSC Internal Location	Brooks, Antwane	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	1	0	EMSC Internal Location	Brooks, Antwane	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	1	0	EMSC Internal Location	Brooks, Antwane	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	1	0	EMSC Internal Location	Brooks, Antwane	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	1	0	EMSC Internal Location	Brooks, Antwane	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	6	0	EMSC Internal Location	Brooks, Antwane	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	6	0	EMSC Internal Location	Brooks, Antwane	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	1	0	EMSC Internal Location	Brooks, Antwane	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	1	0	EMSC Internal Location	Brooks, Antwane	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	2	0	EMSC Internal Location	Brooks, Antwane	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	2	0	EMSC Internal Location	Brooks, Antwane	
NEORS LE	13002622			Miscellaneous	08/30/2013 00:00:00 EA	4	0	EMSC Internal Location	Brooks, Antwane	

The listing now displays earliest **Due Date** listed first.

4- Click the indicator next to **Due Date** to return to the original sequence.

## On-Time Performance Detail

Home	Orders	Shipments	Finance	Admin
Delivery Schedules	Shipment Notices	Shipment Schedules	Receipts	Returns
Overdue Receipts	On-Time Performance			

1- Click the **On-Time Performance** link under the **Shipments** tab.

Home | Orders | Shipments | Finance | Admin

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

On-Time Performance

---

**Simple Search**

Note that the search is case insensitive

Organization  PO Number  

Due Date  Shipment Number

(example: 10/19/2013)

Receipt Number  Item

Supplier Item  Waybill/Airbill Number

Delivery Status



The **On-Time Performance** window is displayed. Multiple search criteria are available for query.

- 2- Enter the **PO Number** value.
- 3- Click the **Go** button.

Home | Orders | Shipments | Finance | Admin

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

On-Time Performance

---

**Simple Search**

Note that the search is case insensitive

Organization  PO Number

Due Date  Shipment Number

(example: 10/19/2013)

Receipt Number  Item

Supplier Item  Waybill/Airbill Number

Delivery Status



Organization	PO Number	Due Date	Shipment Number	Receipt Number	Receipt Date	Item	Supplier	Description	Quantity	Waybill/Airbill	Delivery	Configuration
Number							Item		UOM Received	Number	Carrier Status	Id
HEORSO LE	13000326	10/21/2013 17:00:00	29		10/19/2013 13:37:46	278802	UNKNOWN	GLOVES WELDERS, PREMIUM GRADE COW LEATHER, LARGE M/G/TIG W/NG THUMB 4.5" GAUNTLET SPLIT COW CUFF, MCR MUSTANG 4950L *NO SUBSTITUTION OF SPECIFICATIONS*	PR 2		On-Time	

Performance information for the specific PO is displayed. Note the inclusion of **Delivery Status**.

- 4- Click the **Clear** button to perform another search.

**On-Time Performance**

**Simple Search**

Note that the search is case insensitive

Organization  

Due Date    
(example: 10/19/2013)

Receipt Number

Supplier Item  

Delivery Status **Late** 

PO Number

Shipment Number

Item  

Waybill/Airbill Number

**Go** **Clear**

- 5- Select the **Late** value in the **Delivery Status** field.
- 6- Click the **Go** button.

**On-Time Performance** **Export**

**Simple Search** **Advanced Search**

Note that the search is case insensitive

Organization  

Due Date    
(example: 10/19/2013)

Receipt Number

Supplier Item  

Delivery Status **Late** 

PO Number

Shipment Number

Item  

Waybill/Airbill Number

**Go** **Clear**

Organization	PO Number	Due Date	Shipment Number	Receipt Number	Receipt Date	Item	Supplier	Description	Quantity	UOM	Received	Waybill/ Airbill Number	Carrier Status	Delivery Status	Configuration Id
NEORSO LE	13000228	10/04/2013 17:00:00		32	10/19/2013 13:38:34	002626		ADAPTER BRASS FIRE HOSE SWIVEL STYLE 1 1/2" FEMALE CLEVE FIRE DEPT THRD X 1 1/2" FEMALE NPT --- DIXON #DFP15F15S	EA	1				Late	
NEORSO LE	13000228	10/04/2013 17:00:00		32	10/19/2013 13:38:34	002626		ADAPTER BRASS FIRE HOSE SWIVEL STYLE 1 1/2" FEMALE CLEVE FIRE DEPT THRD X 1 1/2" FEMALE NPT --- DIXON #DFP15F15S	EA	1				Late	
NEORSO LE	13000008	09/24/2013 17:00:00		35	10/17/2013 11:43:53	002626		ADAPTER BRASS FIRE HOSE SWIVEL STYLE 1 1/2" FEMALE CLEVE FIRE DEPT THRD X 1 1/2" FEMALE NPT --- DIXON #DFP15F15S	EA	10				Late	
NEORSO LE	13000020	09/06/2013 17:00:00		46	10/17/2013 11:45:23	014455		BALLAST HIGH PRESSURE SODIUM FOR 150 WATT LAMPS 277 VOLT ADVANCE #71A8172001D	EA	10				Late	

Search results are displayed for all late shipment deliveries. Note the inclusion of **Due Date** and **Receipt Date** for comparison purposes.

## Topic 4: iSupplier Home Page – Finance Tab

iSupplier portal users will have direct access to multiple levels of financial information through the **Finance** tab. This tab provides links to invoice and payment information.

This topic covers:

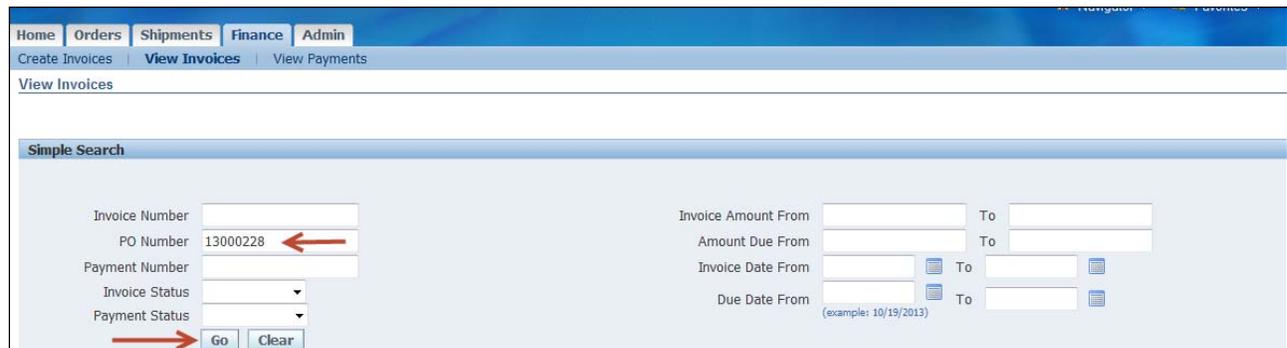
- Overview of the Finance tab and summary information
- Review of Invoice details
- Review of Payments details



The **Home Page** is displayed.

- 1- Click on the **Finance** tab.

## Invoice Information



The **View Invoices** window is displayed. Note the multiple criteria available for query.

- 2- Enter the value in the **PO Number** field.
- 3- Click the **Go** button.



Invoice	Invoice Date	Type	Currency	Amount	Due Status	On Hold	Payment Status	Due Date	Payment	PO Number	Receipt	Attachments
<a href="#">882678</a>	10/17/2013	Standard	USD	100.00	100.00 In-Process		Not Paid	11/15/2013		13000228		

Search results are displayed in summary for all invoices related to the PO.

- 4- Click the **link** under **Invoice** to view details.

# iSupplier Training Guide



Home | Orders | Shipments | Finance | Admin  
 Create Invoices | View Invoices | View Payments  
 Finance: View Invoices >  
 Standard Invoice: RB5678 (Total USD 100.00)  
 Currency=USD

**General**  
 Invoice Date: 10/17/2013  
 Status: In-Process  
 On Hold: None  
 Attachments: None  
 Supplier: INDUSTRIAL SAFETY PRODUCTS INC  
 Supplier Site: 01  
 Address: 6091 CAREY DR, VALLEY VIEW, OH 44125

**Amount Summary**  
 Item: 100.00  
 Freight: 0.00  
 Miscellaneous: 0.00  
 Tax: 0.00  
 Prepayment: 0.00  
 Retainage: 0.00  
 Withholding Tax: 0.00  
 Total: 100.00

**Payment Information**  
 Paid: 0.00  
 Discount Taken: 0.00  
 Due: 100.00  
 Status: Not Paid  
 Payment Date:  
 Payment:  
 Term: NET 30 DAYS

Invoice Lines | Scheduled Payments | Hold Reasons

Line #	Type	Description	Qty UOM	Price	Tax Included	Amount	Retainage/Status	PO Number	PO Line	PO Shipment	Buyer	Receipt
1	Item		1 EA	100.00		100.00	0.00 In-Process	13000228	1	1	Dammarie_Jeanfer.L	

Detail information for the invoice is displayed.

- 5- Note the **Payment Information** summary box.
- 6- Click the **Scheduled Payments** tab.

Home | Orders | Shipments | Finance | Admin  
 Create Invoices | View Invoices | View Payments  
 Finance: View Invoices >  
 Standard Invoice: RB5678 (Total USD 100.00)  
 Currency=USD

**General**  
 Invoice Date: 10/17/2013  
 Status: In-Process  
 On Hold: None  
 Attachments: None  
 Supplier: INDUSTRIAL SAFETY PRODUCTS INC  
 Supplier Site: 01  
 Address: 6091 CAREY DR, VALLEY VIEW, OH 44125

**Amount Summary**  
 Item: 100.00  
 Freight: 0.00  
 Miscellaneous: 0.00  
 Tax: 0.00  
 Prepayment: 0.00  
 Retainage: 0.00  
 Withholding Tax: 0.00  
 Total: 100.00

**Payment Information**  
 Paid: 0.00  
 Discount Taken: 0.00  
 Due: 100.00  
 Status: Not Paid  
 Payment Date:  
 Payment:  
 Term: NET 30 DAYS

Invoice Lines | Scheduled Payments | Hold Reasons

Due Date	Amount	Remaining Amount	Status	Method
11/16/2013	100.00	100.00	Not Paid	Check

**Payment Schedule** information for the invoice is displayed.

- 7- Click the **Hold Reasons** tab.

Home | Orders | Shipments | Finance | Admin  
 Create Invoices | View Invoices | View Payments  
 Finance: View Invoices >  
 Standard Invoice: RB5678 (Total USD 100.00)  
 Currency=USD

**General**  
 Invoice Date: 10/17/2013  
 Status: In-Process  
 On Hold: None  
 Attachments: None  
 Supplier: INDUSTRIAL SAFETY PRODUCTS INC  
 Supplier Site: 01  
 Address: 6091 CAREY DR, VALLEY VIEW, OH 44125

**Amount Summary**  
 Item: 100.00  
 Freight: 0.00  
 Miscellaneous: 0.00  
 Tax: 0.00  
 Prepayment: 0.00  
 Retainage: 0.00  
 Withholding Tax: 0.00  
 Total: 100.00

**Payment Information**  
 Paid: 0.00  
 Discount Taken: 0.00  
 Due: 100.00  
 Status: Not Paid  
 Payment Date:  
 Payment:  
 Term: NET 30 DAYS

Invoice Lines | Scheduled Payments | Hold Reasons

Hold Name	Hold Reason	Hold Date	Release Name	Release Reason	Release Date
No results found.					

[Return to Finance, View Invoices](#)

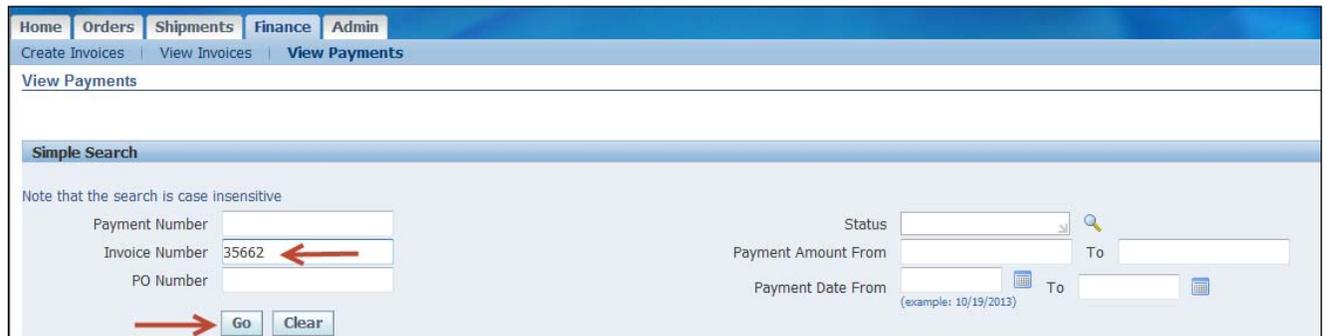
**Hold and Release** information for the invoice is displayed.

- 8- Click the **Return to Finance, View Invoices** link.

## Payments Information

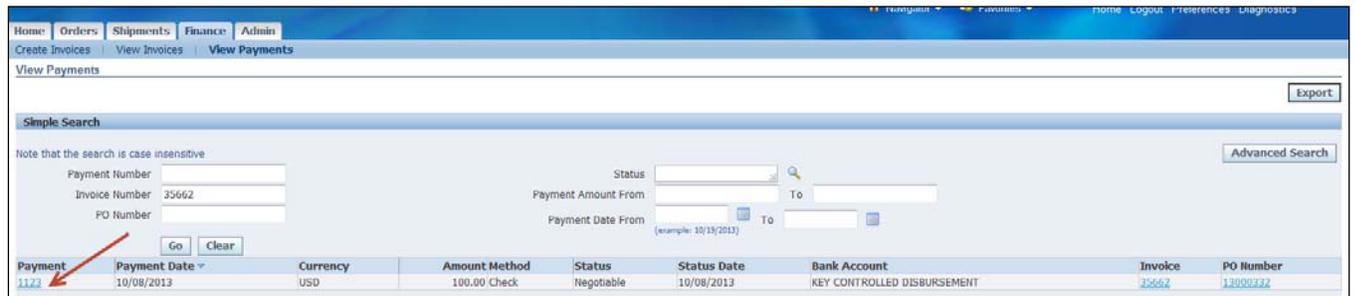


1- Click the **View Payments** link under the **Finance** tab.



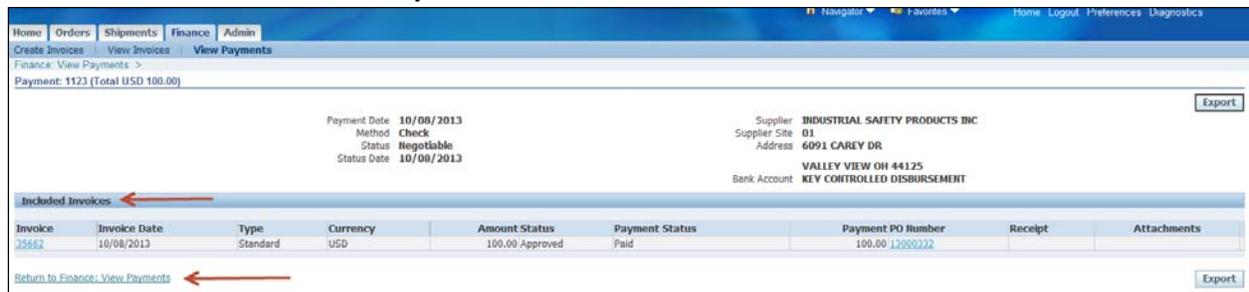
The **View Payments** window is displayed. Note the multiple criteria available for query.

- 2- Enter the value in the **Invoice Number** field.
- 3- Click the **Go** button.



Search results are displayed.

- 4- Click the **link** under the **Payment** to view detail information.



# iSupplier Training Guide



Detail information for the payment is displayed. If desired, user can drill down on details for all **Included Invoices** associated with the payment.

- 5- Click the **Return to Finance, View Payments** link.

## Topic 5: Create Invoices

Registered iSupplier users can create and submit invoices directly through the portal. Once submitted, the invoice status can be viewed online through standard inquiry screens.

This topic covers:

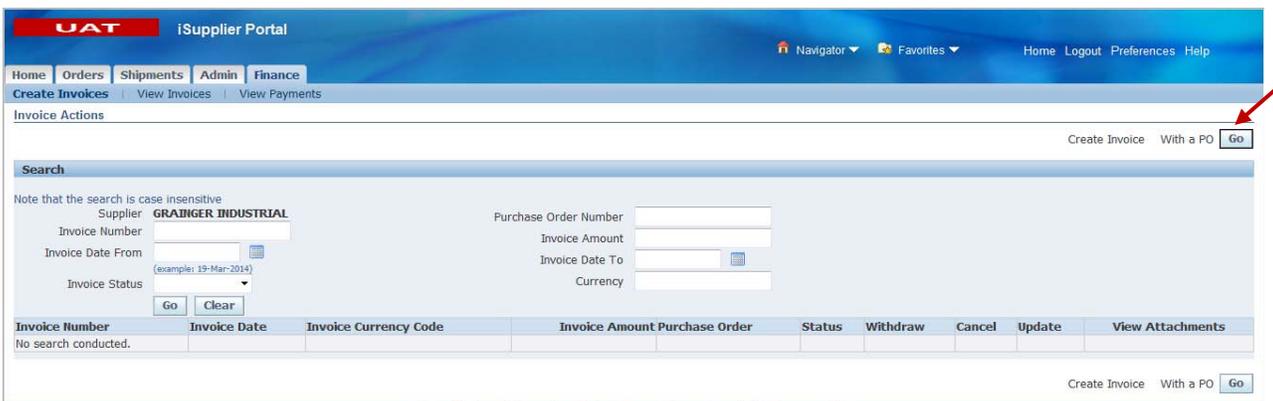
- Invoice creation and submission
- Confirmation of invoice submission status

### Invoice Creation



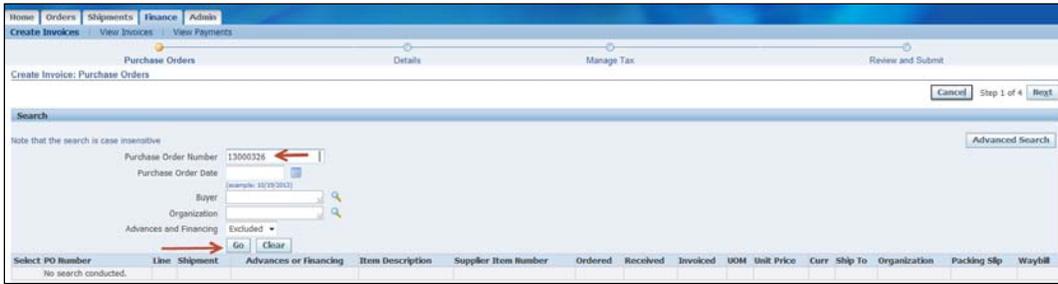
The **Home** tab is displayed.

- 1- Click on the **Finance** tab.



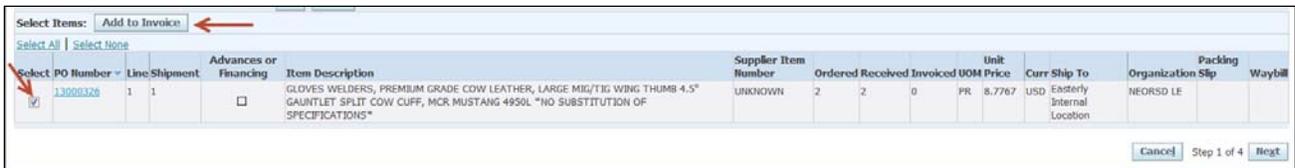
The **Invoice Actions** window is displayed.

- 2- Click the **Go** button to Create Invoice With a PO



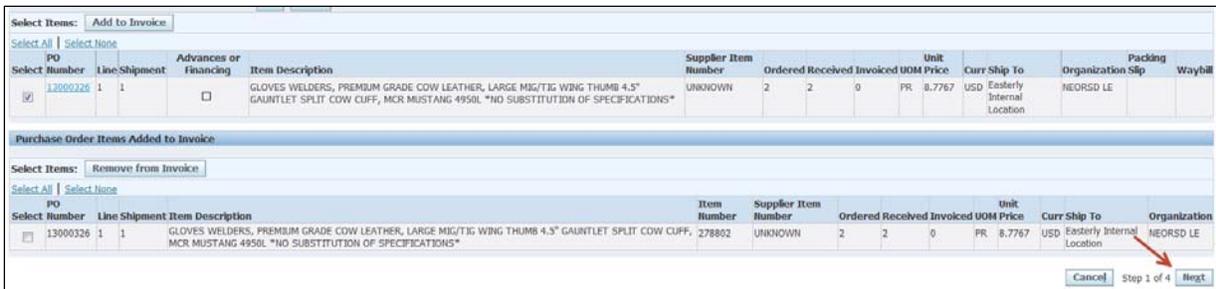
The **Create Invoice: Purchase Orders** window is displayed.

- 3- Using the **Search** window, enter the value in the **Purchase Order Number** field.
- 4- Click the **Go** button.



Search results are displayed, showing all eligible PO lines.

- 5- Click the **Select** button next to line for **PO Number**.
- 6- Click the **Add to Invoice** button.



The line is now included in the **Purchase Order Items Added to Invoice** window.

- 7- Click the **Next** button.

# iSupplier Training Guide



Create Invoices | View Invoices | View Payments

Purchase Orders | **Details** | Manage Tax | Review and Submit

Create Invoice: Details  
\* Indicates required field

Supplier

\* Supplier: INDUSTRIAL SAFETY PRODUCTS INC  
 \* Tax Payer ID: 34-1792160  
 \* Remit To: [Search Icon] ←  
 Address: [Search Icon]  
 Remit To Bank Account: [Search Icon]  
 Unique Remittance Identifier: [Search Icon]  
 Remittance Check Digit: [Search Icon]

Invoice

\* Invoice Number: [Text Field]  
 \* Invoice Date: 10/19/2013  
 Invoice Type: Invoice  
 Currency: USD  
 Invoice Description: [Text Field]  
 Test: [Text Field]  
 Attachment: None Add...

Customer

\* Customer Tax Payer ID: [Text Field]  
 Customer Name: [Text Field]  
 Address: [Text Field]

Items

PO Number	Line	Shipment	Item Description	Supplier Item Number	Ship To	Available Quantity	Quantity	Unit Price	UOM	Amount
13000326	1	1	GLOVES WELDERS, PREMIUM GRADE COW LEATHER, LARGE MIG/TIG WING THUMB 4.5" GAUNTLET SPLIT COW CUFF, MCR MUSTANG 4990L *NO SUBSTITUTION OF SPECIFICATIONS*	UNKNOWN	Easterly Internal Location	2		8.7767	PR	17.55

The **Create Invoice: Details** window is displayed. Use this window to complete detail information for the invoice.

**Note:** Required fields are indicated with \* and must be completed to proceed from this window.

8- Use the **Search** (magnifying glass) icon to find the appropriate **Remit To** value.

Search and Select: Remit To

Cancel Select

**Search**

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By: Remit To [Text Field] Go ←

**Results**

Select	Quick Select	Supplier	Remit To	Address	Organization
	No search conducted.				

[About this Page](#)

Cancel Select

The **Search and Select** window is displayed.

9- Click the **Go** button.

Search and Select: Remit To

Cancel Select

**Search**

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By Remit To  Go

**Results**

Select	Quick Select	Supplier	Remit To	Address	Organization
<input type="radio"/>		INDUSTRIAL SAFETY PRODUCTS INC	01	6091 CAREY DR VALLEY VIEW OH 44125	NEORS LE

[About this Page](#)

Cancel Select

The **Results** window is displayed.

10- Use the **Quick Select** button to select the appropriate **Remit To** value.

Create Invoices | View Invoices | View Payments

Purchase Orders | **Details** | Manage Tax | Review and Submit

Create Invoice: Details

\* Indicates required field

Cancel Back Step 2 of 4 Next

Supplier	Invoice
* Supplier: INDUSTRIAL SAFETY PRODUCTS INC Tax Payer ID: 34-1792100 * Remit To: 01 Address: 6091 CAREY DR VALLEY VIEW OH 44125 Remit To Bank Account: <input type="text"/> Unique Remittance Identifier: <input type="text"/> Remittance Check Digit: <input type="text"/>	* Invoice Number: 75567212 * Invoice Date: 10/19/2013 <small>(Example: 8/7/2013)</small> Invoice Type: Invoice Currency: USD Invoice Description: <input type="text"/> Test: <input type="text"/> Attachment: None Add...

The **Remit To** value is entered into the field.

11- Enter the appropriate value in the **Invoice Number** field.

12- Enter the appropriate value in the **Invoice Date** field. (Use the **Calendar** icon or enter date manually into field).

**Customer**

\* Customer Tax Payer ID  

Customer Name

Address

In the **Customer** section of the window:

13- Use the **Search** (magnifying glass) icon to find the appropriate **Customer Tax Payer ID** value.

Search and Select: Customer Tax Payer ID

**Search**

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By    ←

**Results**

Select	Quick Select	Registration Number	Legal Entity	Legislative Category	Country Of Registration	Legal Address
		No search conducted.				

[About this Page](#)

The **Search and Select** window is displayed.

14- Click the **Go** button.

**Search**

To find your item, select a filter item in the pulldown list and enter a value in the text field, then select the "Go" button.

Search By

**Results**

Select	Quick Select	Registration Number	Legal Entity	Legislative Category	Country Of Registration	Legal Address
<input type="radio"/>		SYS11976	NEORSD LE	Income Tax	US	3900 Euclid Ave Cleveland Cuyahoga 44115

[About this Page](#)

The **Results** window is displayed.

15- Use the **Quick Select** button to select the appropriate **Registration Number** value.

# iSupplier Training Guide



All required fields have now been entered for the invoice.  
16- Click the **Next** button.

Review the invoice information.  
17- Click the **Submit** button.

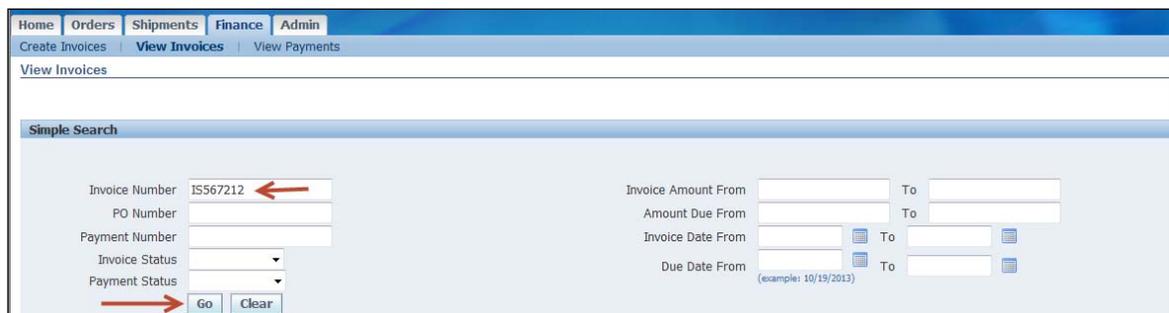
The **Confirmation** window is displayed. The invoice has now been submitted to the NEORISD AP Department.

## Confirmation of Invoice Submission Status



To confirm the status of the submitted invoice:

- 1- Click the **View Invoices** link.



Home Orders Shipments Finance Admin  
Create Invoices View Invoices View Payments

View Invoices

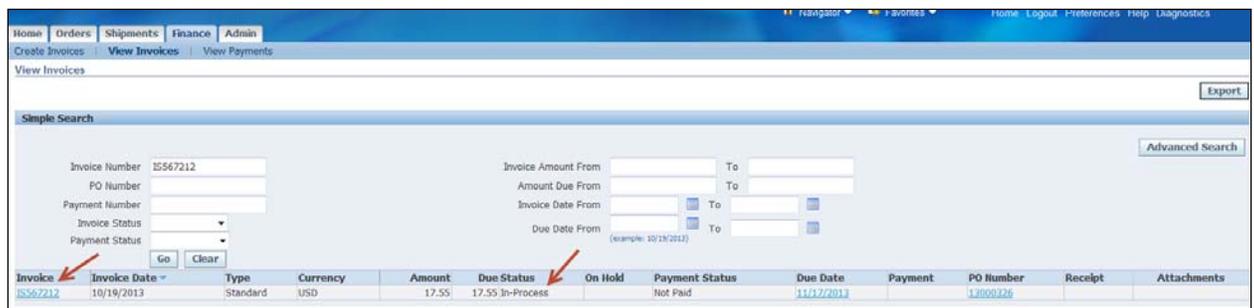
Simple Search

Invoice Number IS567212  
PO Number  
Payment Number  
Invoice Status  
Payment Status  
Go Clear

Invoice Amount From To  
Amount Due From To  
Invoice Date From To  
Due Date From To  
(example: 10/19/2013)

The **View Invoices** window is displayed.

- 2- Enter the value in the **Invoice Number** field.
- 3- Click the **Go** button.



Home Orders Shipments Finance Admin  
Create Invoices View Invoices View Payments

View Invoices

Simple Search

Invoice Number IS567212  
PO Number  
Payment Number  
Invoice Status  
Payment Status  
Go Clear

Invoice Amount From To  
Amount Due From To  
Invoice Date From To  
Due Date From To  
(example: 10/19/2013)

Invoice	Invoice Date	Type	Currency	Amount	Due Status	On Hold	Payment Status	Due Date	Payment	PO Number	Receipt	Attachments
IS567212	10/19/2013	Standard	USD	17.55	17.55 In-Process		Not Paid	11/17/2013		13000326		

Search results are displayed.

- 4- Note the summary information for the invoice, including the **Status** of In-Process.

## Topic 6: Create Advance Shipment Notices

Registered iSupplier users can create and submit Advance Shipment Notices (ASN) directly through the portal. Once submitted, the status of the ASN can be viewed online through standard inquiry screens.

This topic covers:

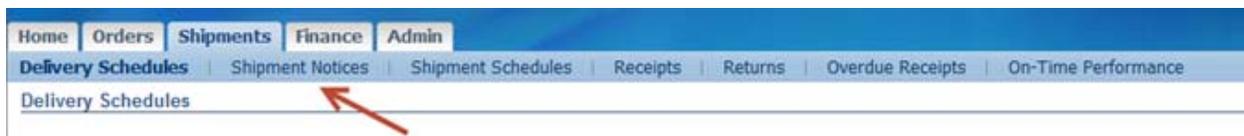
- Creation steps for Advance Shipment Notices
- Steps for viewing submitted Advance Shipment Notices
- Steps for cancelling submitted Advance Shipment Notices

### Advance Shipment Notice (ASN) Creation



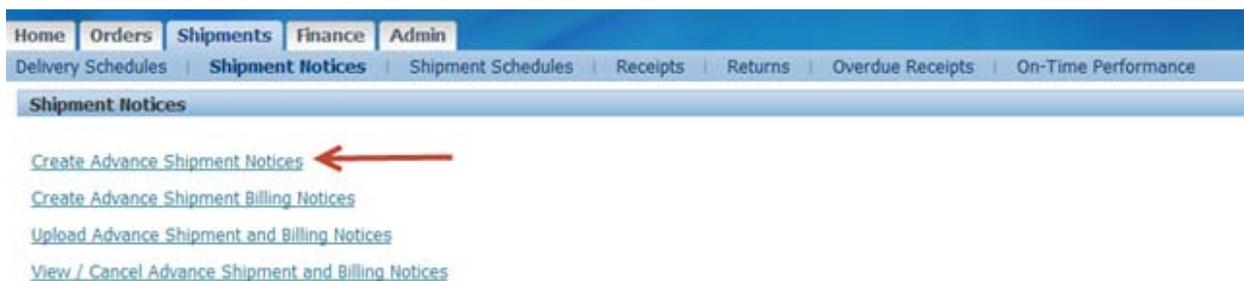
The **Home** tab is displayed.

- 1- Click on the **Shipments** tab.



The **Shipments** window is displayed.

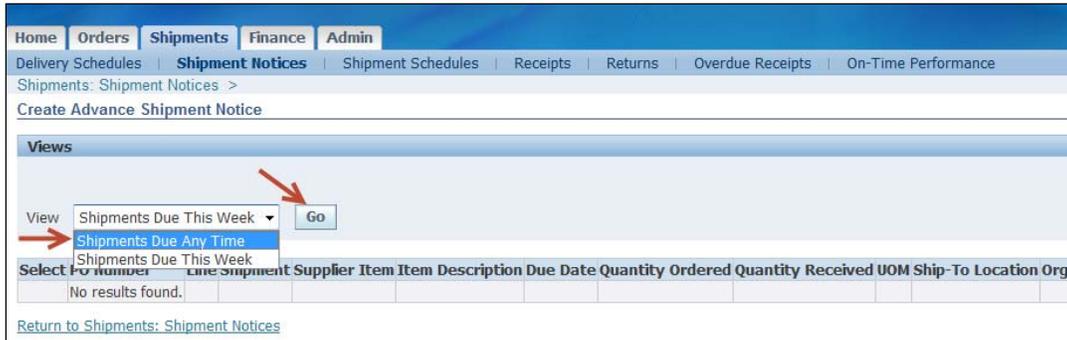
- 2- Click the **Shipment Notices** link.



The **Shipment Notices** window is displayed.

- 3- Click the **Create Advance Shipment Notices** link.

# iSupplier Training Guide



The **Create Advance Shipment Notice** window is displayed. To search for shipments, use the **Views** window.

- 4- Select the **Shipments Due Any Time** value in the **View** field.
- 5- Click the **Go** button.

Select PO Number	Line	Shipment	Supplier Item	Item Description	Due Date	Quantity Ordered	Quantity Received	UOM	Ship-To Location	Organization Name	Ship-To Organization	Currency	Supplier Site
13002622	3	1		Miscellaneous	08/30/2013 00:00:00	1	0	EA	EMSC Internal Location	NEORSO LE	EMSC	USD	01
13002622	4	1		Miscellaneous	08/30/2013 00:00:00	2	0	EA	EMSC Internal Location	NEORSO LE	EMSC	USD	01
13002622	2	1		Miscellaneous	08/30/2013 00:00:00	1	0	EA	EMSC Internal Location	NEORSO LE	EMSC	USD	01
13002622	1	1		Miscellaneous	08/30/2013 00:00:00	1	0	EA	EMSC Internal Location	NEORSO LE	EMSC	USD	01
13002622	19	1		Miscellaneous	08/30/2013 00:00:00	1	0	EA	EMSC Internal Location	NEORSO LE	EMSC	USD	01
13002622	18	1		Miscellaneous	08/30/2013 00:00:00	4	0	EA	EMSC Internal Location	NEORSO LE	EMSC	USD	01
13002622	17	1		Miscellaneous	08/30/2013 00:00:00	1	0	EA	EMSC Internal Location	NEORSO LE	EMSC	USD	01
13002622	16	1		Miscellaneous	08/30/2013 00:00:00	6	0	EA	EMSC Internal Location	NEORSO LE	EMSC	USD	01
13002622	15	1		Miscellaneous	08/30/2013 00:00:00	1	0	EA	EMSC Internal Location	NEORSO LE	EMSC	USD	01
13002622	14	1		Miscellaneous	08/30/2013 00:00:00	1	0	EA	EMSC Internal Location	NEORSO LE	EMSC	USD	01
13002622	13	1		Miscellaneous	08/30/2013 00:00:00	6	0	EA	EMSC Internal Location	NEORSO LE	EMSC	USD	01
13002622	12	1		Miscellaneous	08/30/2013 00:00:00	6	0	EA	EMSC Internal Location	NEORSO LE	EMSC	USD	01

Eligible shipment lines are displayed as a result of the query.

- 6- Click the **Advanced Search** button.

To search, please enter at least one search criteria.  
Specify parameters and values to filter the data that is displayed in your results set.

Show table data when all conditions are met.  
 Show table data when any condition is met.

PO Number is 1300008

Ship-To Location is

Supplier Site is

Item is

Go Clear Add Another Item Add

Select PO Number Line Shipment Supplier Item Item Description Due Date Quantity Ordered Quantity Received UOM Ship-To Location Organization Name Ship-To Organization Currency Supplier Site

No search conducted.

The **Advanced Search** window is displayed. Use this window to narrow the search.

- 7- Enter the value in the **PO Number** field.

# iSupplier Training Guide



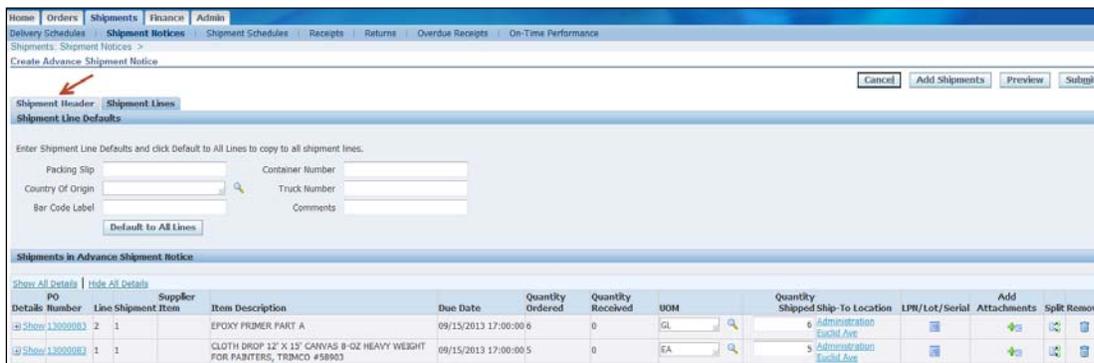
8- Click the **Go** button.



Search results are displayed for eligible shipment lines.

9- Click the **Select** button for each shipment line to be added.

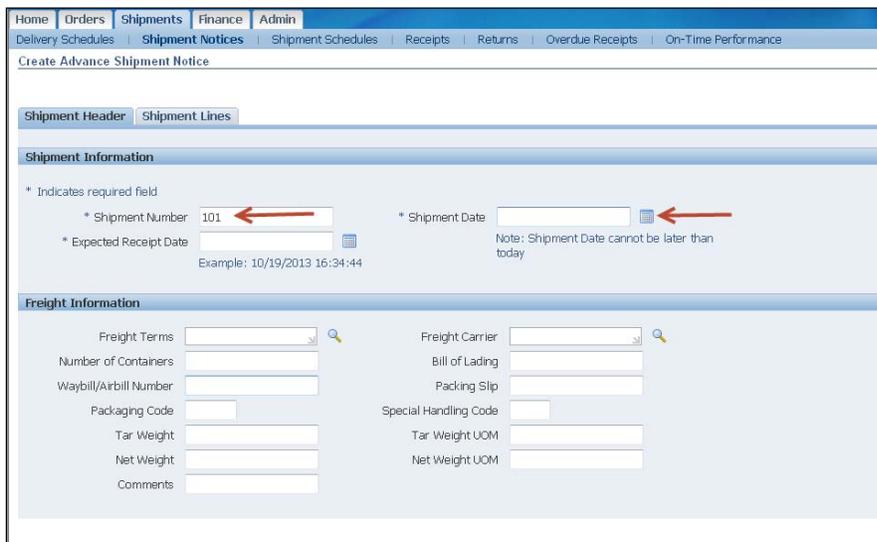
10- Click the **Add to Shipment Notice** button.



The lines are added in the **Shipments In Advanced Shipment Notice** section of the window.

**Note:** User can change quantities, remove lines, or split lines as needed from this window.

11- Click the **Shipment Header** tab.



The **Shipment Header** window is displayed. Use this window to complete header information for the ASN.

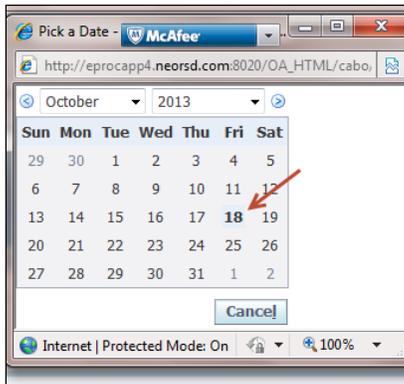
# iSupplier Training Guide



**Note:** Required fields are indicated with \* and must be completed to proceed from this window.

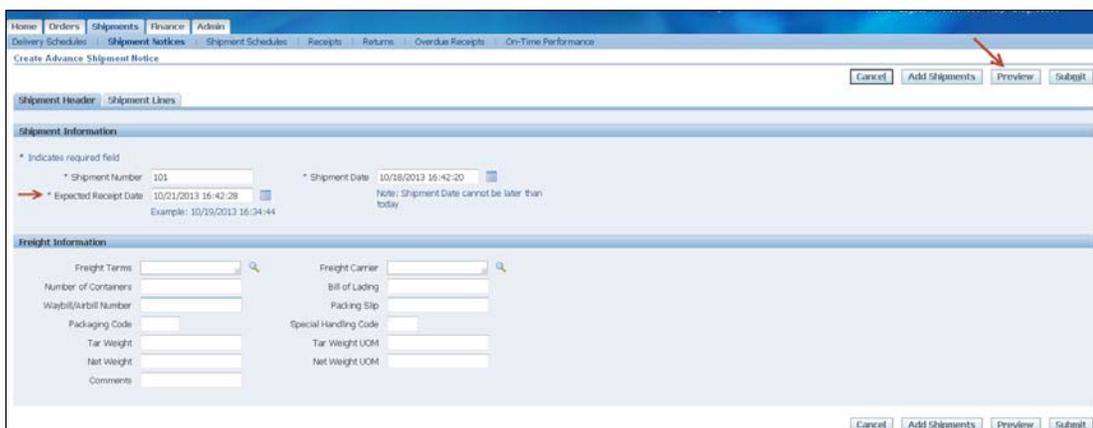
12- Enter the value in the **Shipment Number** field.

13- Click the **Calendar** icon for the **Shipment Date** field.

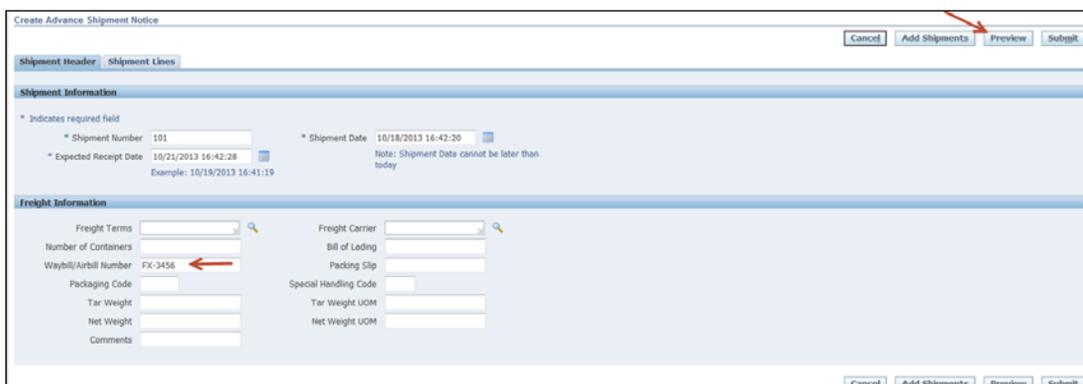


The **calendar** is displayed.

14- Click the appropriate **day** value.



15- Repeat the process to enter the value for the **Expected Receipt Date** field.



# iSupplier Training Guide



Use the **Freight Information** section to add additional information if desired:

- 16- Enter value in the **Waybill/Airbill Number** field.
- 17- Click the **Preview** button.

Home | Orders | Shipments | Finance | Admin

Delivery Schedules | **Shipment Notices** | Shipment Schedules | Receipts | Returns | Overdue Receipts | On-Time Performance

Advance Shipment Notice Information

Cancel Back **Submit**

**Shipment Information**

Shipment Number 101  
Expected Receipt Date 10/21/2013 16:42:28  
Shipment Date 10/18/2013 16:42:20

**Freight Information**

Freight Terms	Comments
Ship-From Location Code	Freight Carrier
Number of Containers	Bill of Lading
Waybill/Airbill Number <b>FX-3456</b>	Packing Slip
Packing Code	Special Handling Code
Tar Weight	Tar Weight UOM
Net Weight	Net Weight UOM

**Shipment Lines**

Show All Details | Hide All Details

PO	Details	Number	Line	Shipment	Supplier	Item	Item Description	Due Date	Quantity Ordered	Quantity Received	UOM	Quantity Shipped	Ship-To Location	Attachments
	Show 13000083	2	1				EPOXY PRIMER PART A	09/15/2013 17:00:00	0	0	GL	5	Administration Euclid Ave	Administration Euclid Ave
	Show 13000083	1	1				CLOTH DROP 12' X 15' CANVAS 8-OZ HEAVY WEIGHT FOR PAINTERS, TRIMCO #58903	09/15/2013 17:00:00	0	0	EA	5	Administration Euclid Ave	Administration Euclid Ave

Review the completed ASN information.

- 18- Click the **Submit** button.

Home | Orders | Shipments | Finance | Admin

Delivery Schedules | **Shipment Notices** | Shipment Schedules | Receipts | Returns | Overdue Receipts | On-Time Performance

**Advance Shipment Notice Confirmation**

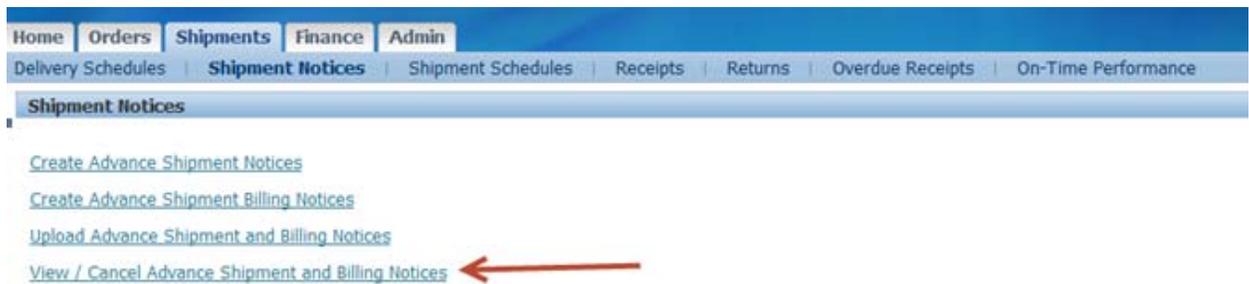
Your Advance Shipment Notice 101 has been submitted.

[Return to Advance Shipment Notices](#)

The **Confirmation** window is displayed.

- 19- Click the **Return to Advance Shipment Notices** link.

## View Advance Shipment Notices



The **Shipment Notices** window is displayed.

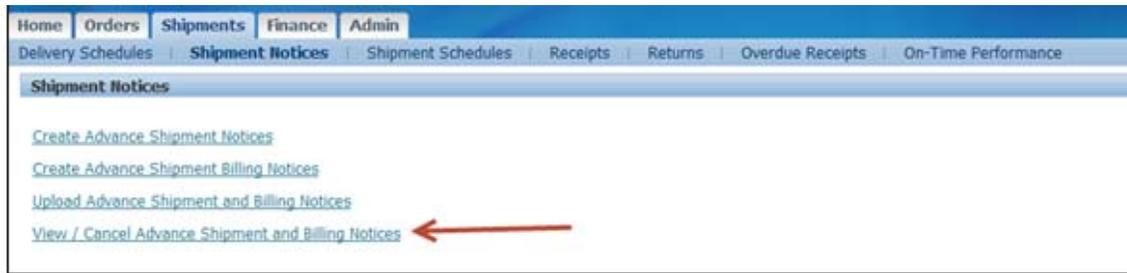
- 1- Click on the **View / Cancel Advance Shipment and Billing Notices** link.



The **Views** window is displayed. Note the default view showing the **Last 25 Shipment Notices** now includes the created ASN.

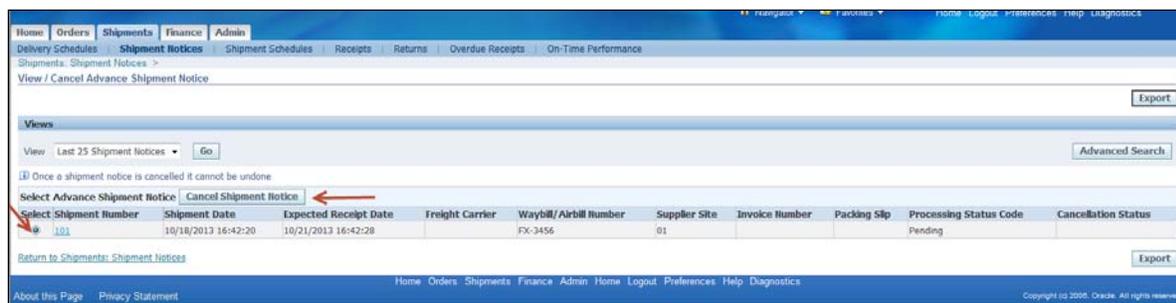
- 2- Note the **Processing Status Code** of **Pending** for the newly created ASN.
- 3- Click the **Return to Shipments: Shipment Notices** link.

## Cancel Advance Shipment Notices



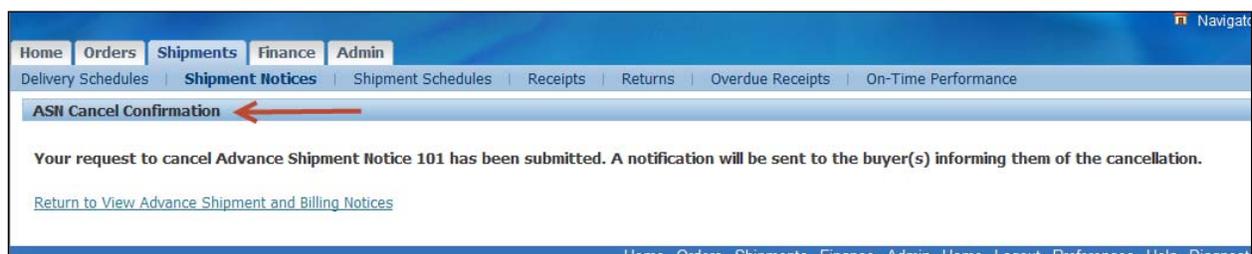
The **Shipment Notices** window is displayed.

- 1- Click on the **View / Cancel Advance Shipment and Billing Notices** link.



The **Views** window is displayed. Note the default view showing the **Last 25 Shipment Notices** now includes the created ASN.

- 2- Note the **Processing Status Code** of **Pending** for the newly created ASN.
- 3- Click the **Select** button next to the **Shipment Number** to be cancelled.
- 4- Click the **Cancel Shipment Notice** button.



The **Confirmation** window is displayed.

**Note:** Once a shipment notice is cancelled, it cannot be undone.

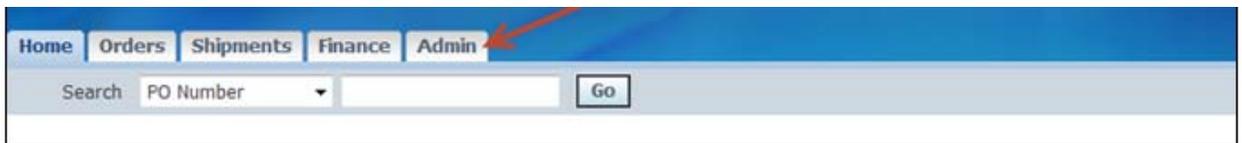
## Topic 7: iSupplier Administrative Updates

Registered iSupplier users can maintain updated profile information directly through the portal. Changes to address, contact, product, and business classification information can be submitted for review and approval by JAA purchasing administration.

This topic covers:

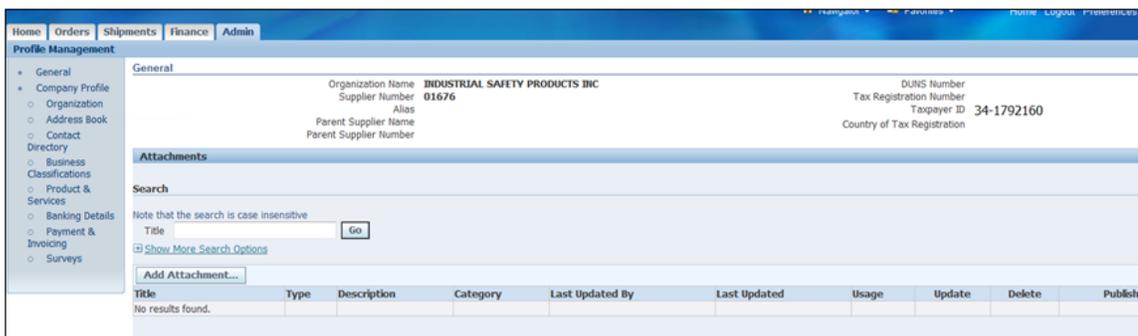
- Access to the Admin tab for viewing and updating profile information
- Updating supplier address information
- Updating supplier contact information
- Updating supplier product information
- Updating supplier business classification information

### Access the Admin Tab



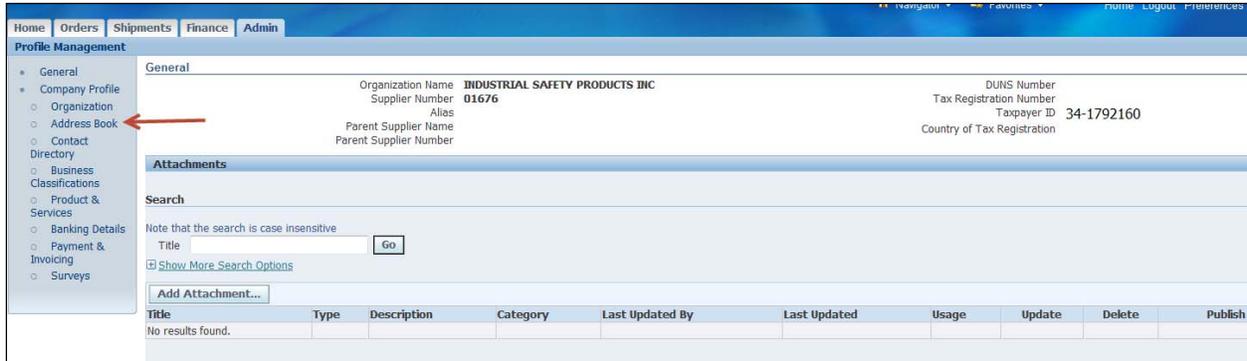
The **Home Page** is displayed.

- 1- Click the **Admin** tab.



The **Profile Management** window is displayed. Use this window to update all profile information.

## Update Supplier Address

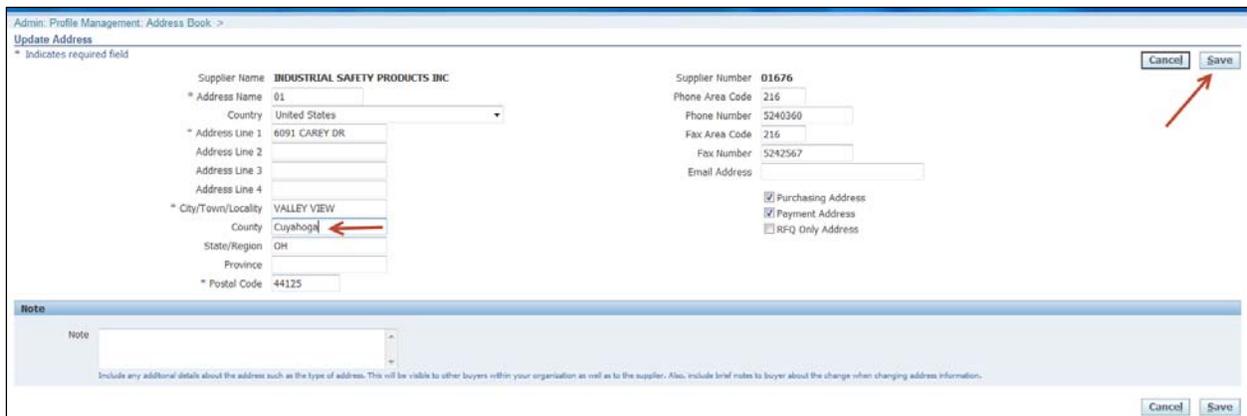


1- Click the **Address Book** link.



The **Address Book** window is displayed. All current addresses for the supplier are listed here.

2- Click the **Update** icon.



The **Update Address** window is displayed. Use this window to make any changes or additions to address information.

3- Enter the value in the **County** field.

4- Click the **Save** button.



The **Confirmation** window is displayed.

## Update Supplier Contact Information



1- Click the **Contact Directory** link.



The **Contact Directory: Active Contacts** window is displayed. All active contacts for the supplier are listed here.

2- Click the **Update** icon.



The **Update Contact** window is displayed. Use this window to make any changes or additions to contact information.

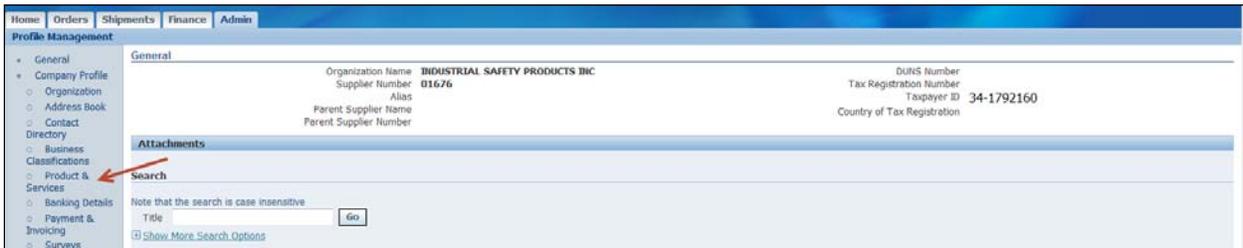
3- Enter the value in the **Department** field.

4- Click the **Save** button.



The **Confirmation** window is displayed. Note the **Status** of **Change Pending** as a result of the update.

## Update Products and Services Information



1- Click the **Products & Services** link.



The **Products & Services** window is displayed. All current **approved** products and services for the supplier are listed.

2- Click the **Add** button.



The **Add Products and Services** window is displayed. Use this window to browse through the values, or select the **Search** option for a specific search if desired.

**Note:** Only **applicable** values are listed or available for search for each supplier.

- 3- Click the checkbox for the desired Applicable value(s).
- 4- Click the **Apply** button.



The **Confirmation** window is displayed.

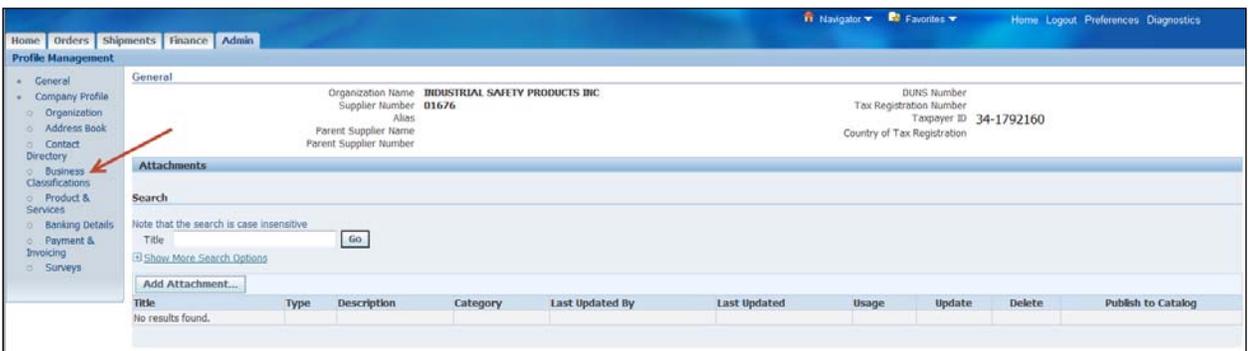
- 5- Click the **Return to Products and Services** link.



The Products and Services window is displayed with the added value.

- 6- Note the **Approval Status of Pending Approval** for the added value.

## Update Supplier Business Classifications



- 1- Click on the **Business Classifications** link.

# iSupplier Training Guide



UAT iSupplier Portal

Home Orders Shipments Admin Finance

Profile Management

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

Business Classifications

Cancel Save

**Certification**

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

Last Certified By

TIP Date format example: 19-Mar-2014

Classification	Applicable	Certificate Number	Certifying Agency	Expiration Date
JSEB	<input type="checkbox"/>			
Minority Owned	<input type="checkbox"/>			
Non Certified Minority	<input type="checkbox"/>			
Non Certified Women	<input type="checkbox"/>			
Service-disabled Veteran Owned	<input type="checkbox"/>			
Small Business	<input type="checkbox"/>			
Veteran Owned	<input checked="" type="checkbox"/>			
Women Owned	<input type="checkbox"/>			

Cancel Save

The **Business Classifications** window is displayed.

- 2- Select the appropriate classification. Enter additional certifying information if known.
- 3- Click the **Certification** checkbox.
- 4- Click the **Save** button.

UAT iSupplier Portal

Home Orders Shipments Admin Finance

Profile Management

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

Business Classifications

Cancel Save

**Certification**

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

Last Certified **03-Apr-2014** By **KATIE ABORDO**

TIP Date format example: 19-Mar-2014

Classification	Applicable	Certificate Number	Certifying Agency	Expiration Date
JSEB	<input type="checkbox"/>			
Minority Owned	<input type="checkbox"/>			
Non Certified Minority	<input type="checkbox"/>			
Non Certified Women	<input type="checkbox"/>			
Service-disabled Veteran Owned	<input type="checkbox"/>			
Small Business	<input type="checkbox"/>			
Veteran Owned	<input checked="" type="checkbox"/>			
Women Owned	<input type="checkbox"/>			

Cancel Save

The **Business Classification** window is updated with **Last Certified** information.

## Topic 8: Sourcing Supplier Portal

### Supplier Access to Sourcing Supplier Portal

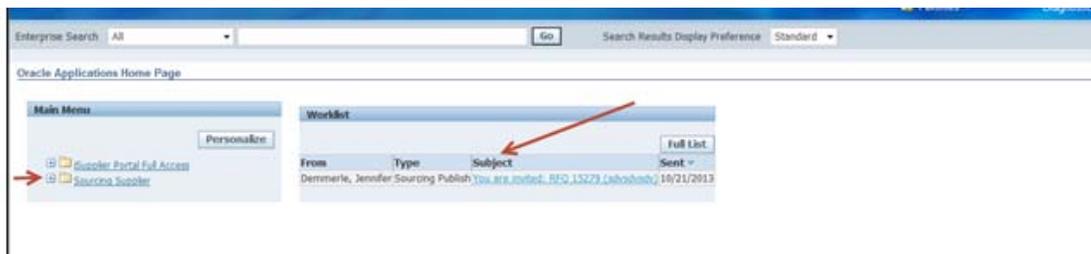
Approved supplier users will be registered at JAA for access to this portal.

Registered suppliers will receive valid **UserID** and **Password** login credentials via email from designated JAA administrators. The email information will also include the appropriate **link** to the login page for access.

This topic covers:

- Navigation to the Sourcing Supplier Home Page and Review
- Responding to RFQ invitations through online quote creation
- Creating online discussions through portal messaging

### Sourcing Supplier Home Page



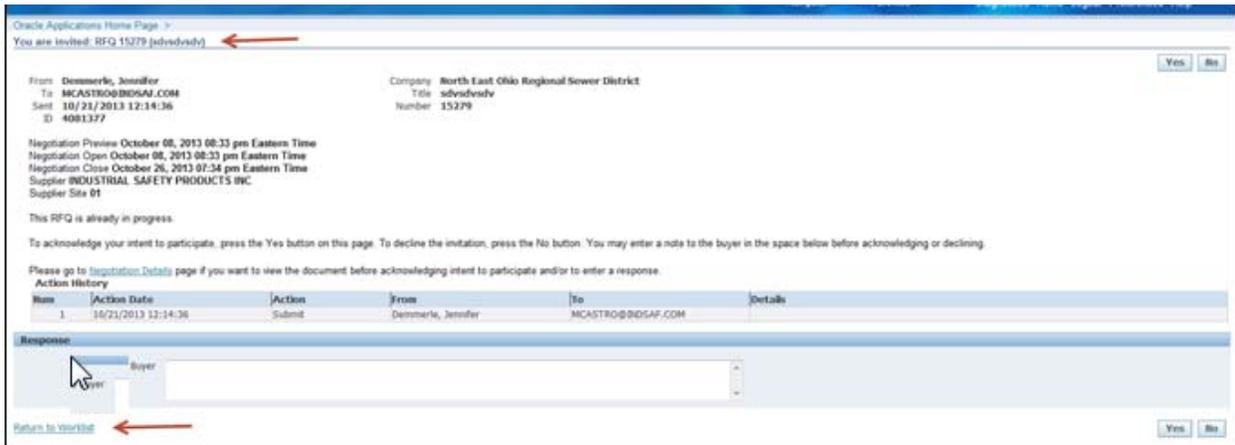
The **Oracle Applications Home Page** is displayed.

Note the **Sourcing Supplier** responsibility listed. This responsibility provides access to the **Home Page** for Sourcing Supplier.

Note the **Worklist** region of this page. All **Invitations** for quote responses will be listed here.

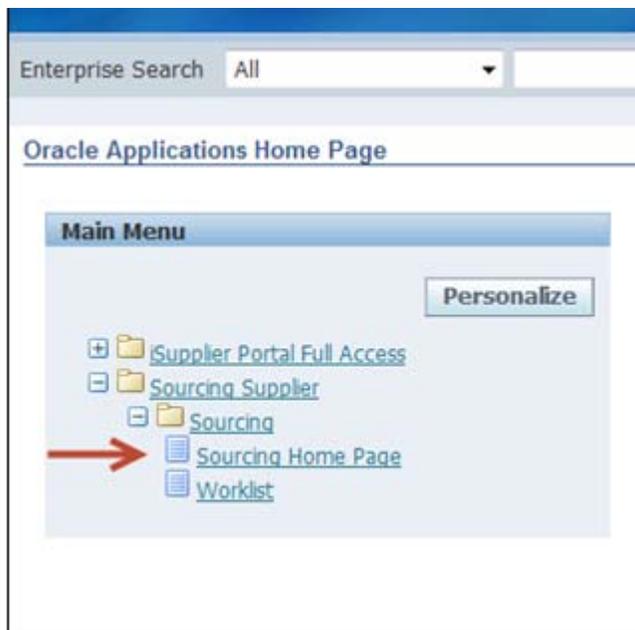
- 1- Click the **Subject** link to view the details of the invitation.

# iSupplier Training Guide

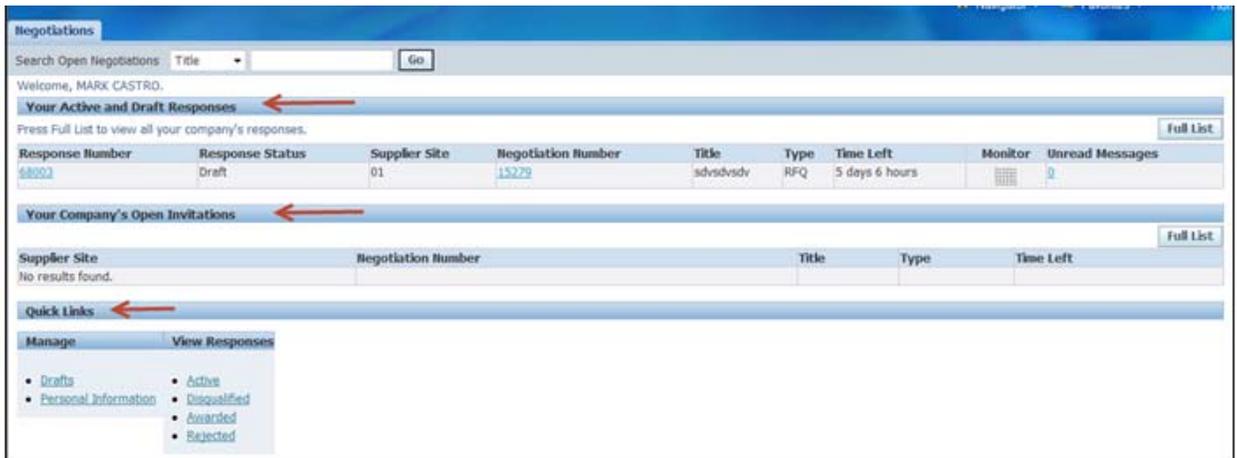


The **Invitation Details** are displayed. Supplier users can respond directly from this screen, or create a separate detailed **quote** for response.

- 2- Click the **Return to Worklist** link.



- 3- Use the **Sourcing / Sourcing Home Page** link to navigate to the **Home Page**.



The **Home Page** is displayed.

- 4- Note the information contained in the **Your Active and Draft Responses** region of the page. You will use this region to navigate directly to all responses.
- 5- Note the information contained in the **Your Company's Open Invitations** region of the page. All open invitations for RFQ response will be listed here.
- 6- Note the **Quick Links** region of the page. You will use this region to navigate **directly** to view Responses by **Type (Active/Disqualified/Accepted/Rejected)**. Use this region to also update **Personal Information** related to contact information for responses.

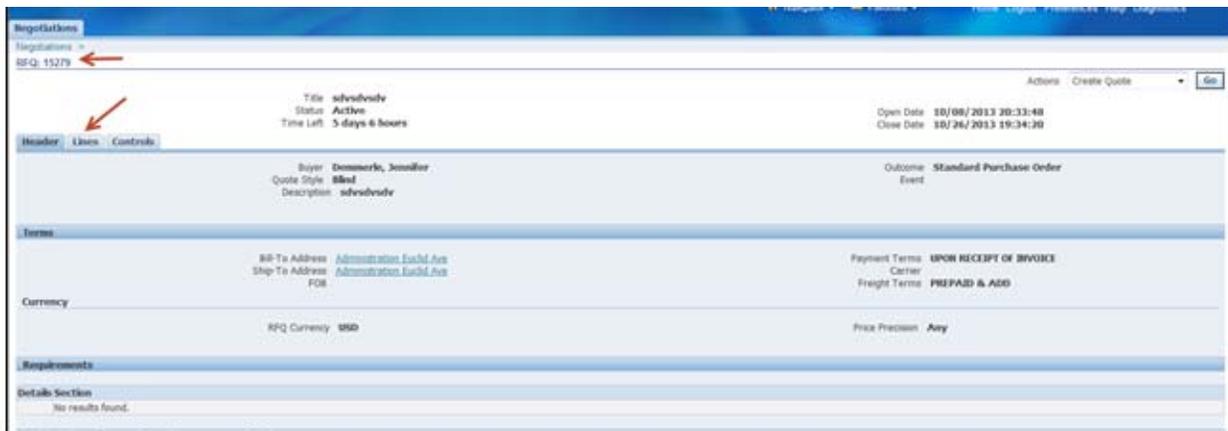
## Creating Quotes

Registered supplier users can immediately respond to JAA bid invitations through the portal. Completed quotes can include notes to buyer, and any attachments that the supplier user wants to add as part of the response. Prior to submission, quote responses can be **validated** to ensure all required information is entered on the response.



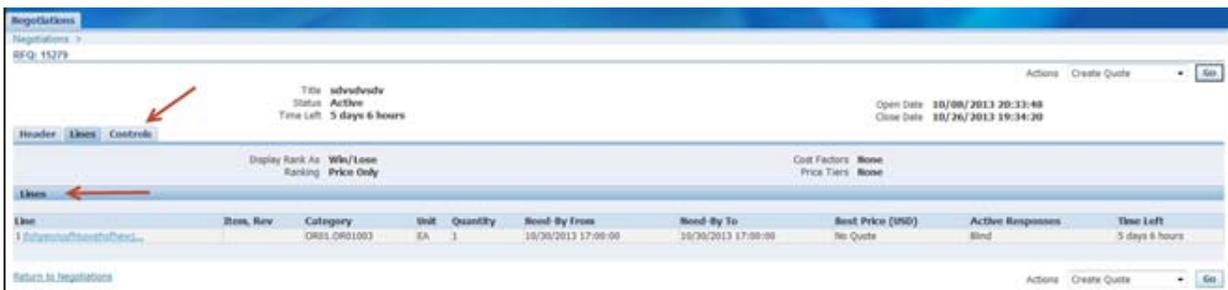
All active quote responses are listed in the **Your Active and Draft Responses** section of the Home Page.

- 1- Click the [link](#) under the **Negotiation Number** field to access the negotiation.



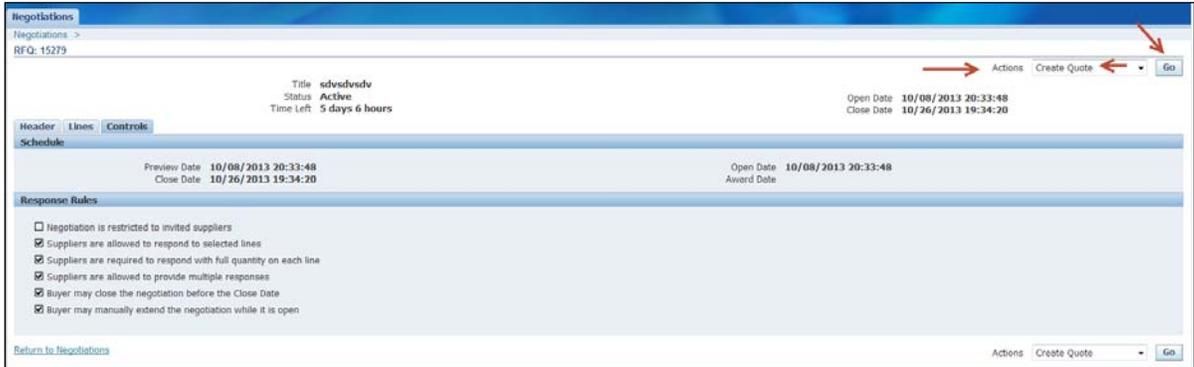
The **Negotiations** window is displayed, showing **summary** information for the RFQ.

- 2- Click on the **Lines** tab to access the lines of the RFQ.



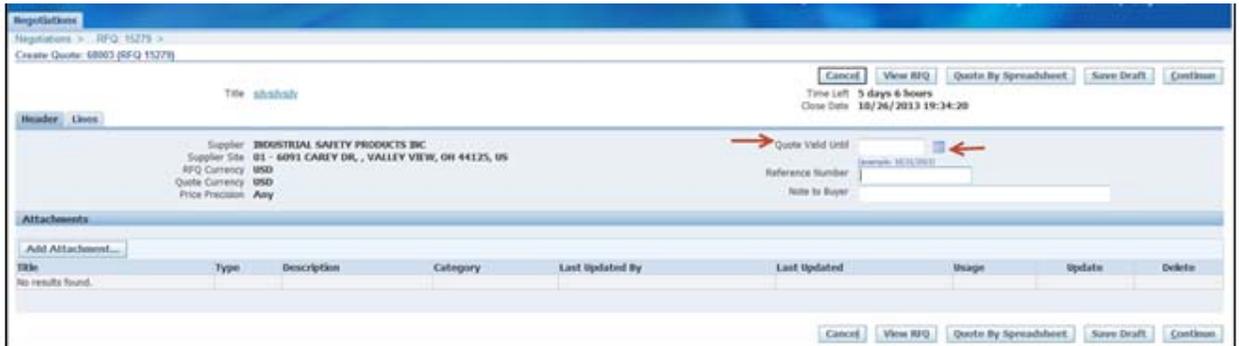
The **RFQ Lines** window is displayed, showing all detail lines information for the RFQ.

- 3- Click on the **Controls** tab to view response rules for the RFQ.



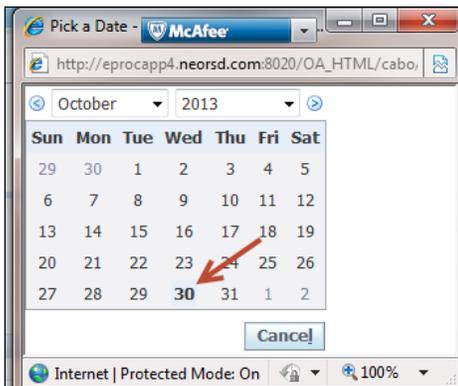
The **Controls** window is displayed, listing the **Schedule** information and all valid **Response Rules** established by JAA for the RFQ.

- 4- Review the information in this window.
- 5- To initiate the creation of the quote response, select the **Create Quote** value in the **Actions** box.
- 6- Click the **Go** button.



The **Create Quote** window is displayed. The window defaults to the **Header** area of the quote.

- 7- Use the **Calendar** icon to enter the appropriate value for the **Quote Valid Until** date.

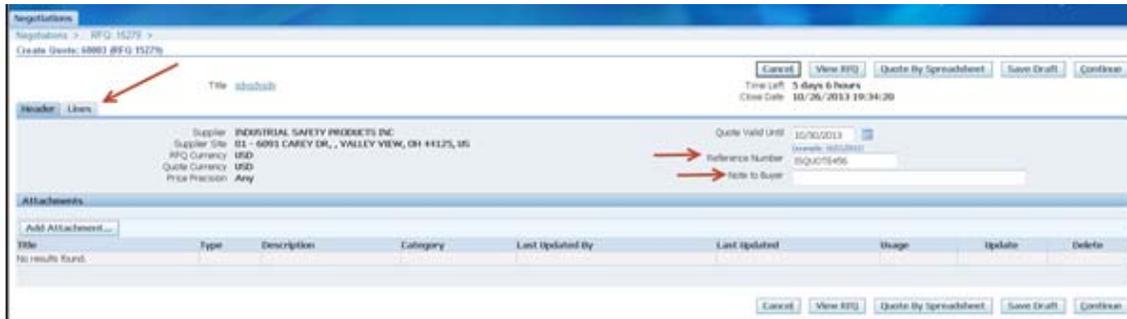


The **Calendar** window is displayed.

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8- Select the appropriate **Day** value.

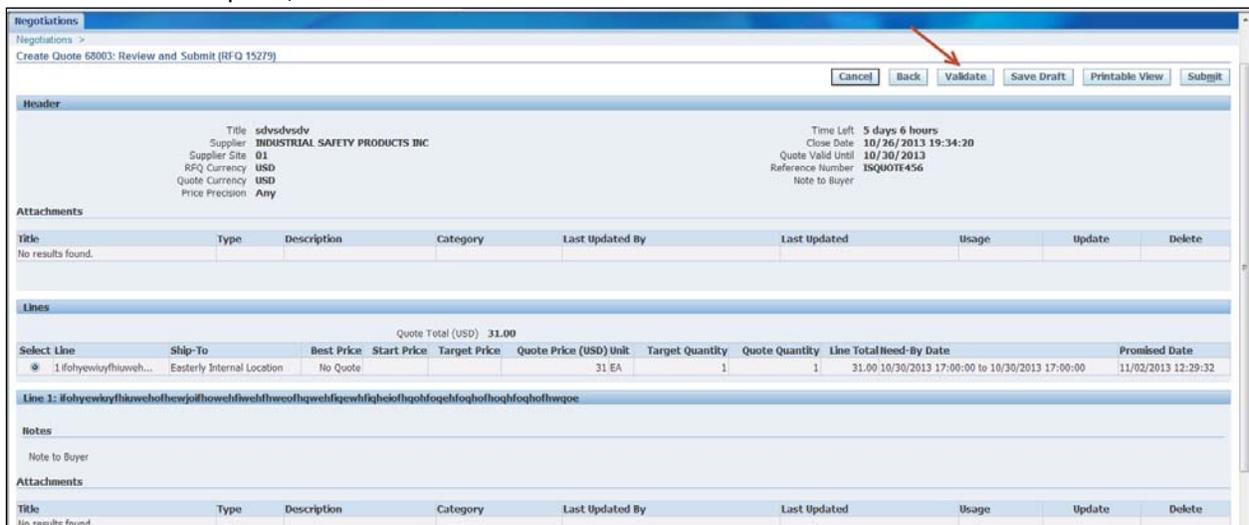


- 9- Enter the value for the **Reference Number** of the quote response.
- 10- If desired, enter a **Note to Buyer** (up to 240 characters) in the designated field.
- 11- Click the **Lines** tab.



The **Lines** window is displayed.

- 12- Enter the **Quote Price** and **Promised Date** for each line.
- 13- When complete, click the **Continue** button.



The **Review and Submit** window is displayed.

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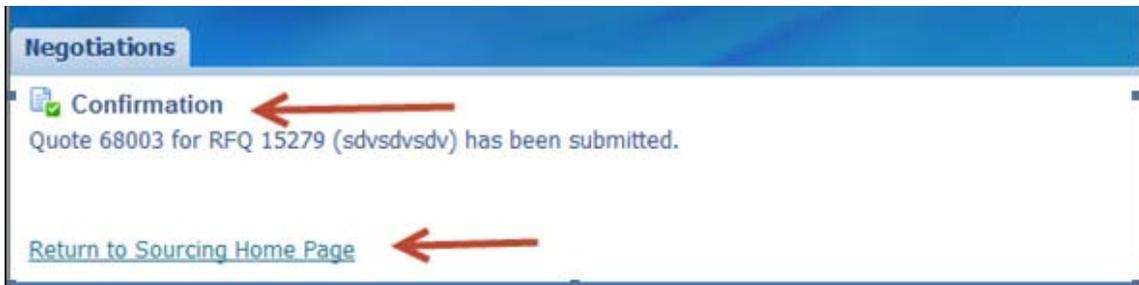
14- Use the **Validate** button to initiate pre-validation of the quote to ensure all required information has been entered prior to submission.

**Note:** At any point in quote creation, the user can click the **Save Draft** button prior to submission, and return to the quote to continue creation in another session.



The **Confirmation** window is displayed to indicate validation with no errors.

15- Click the **Submit** button.



The **Confirmation** window is displayed to confirm successful submission of the quote.

16- Click the **Return to Sourcing Home Page** link.

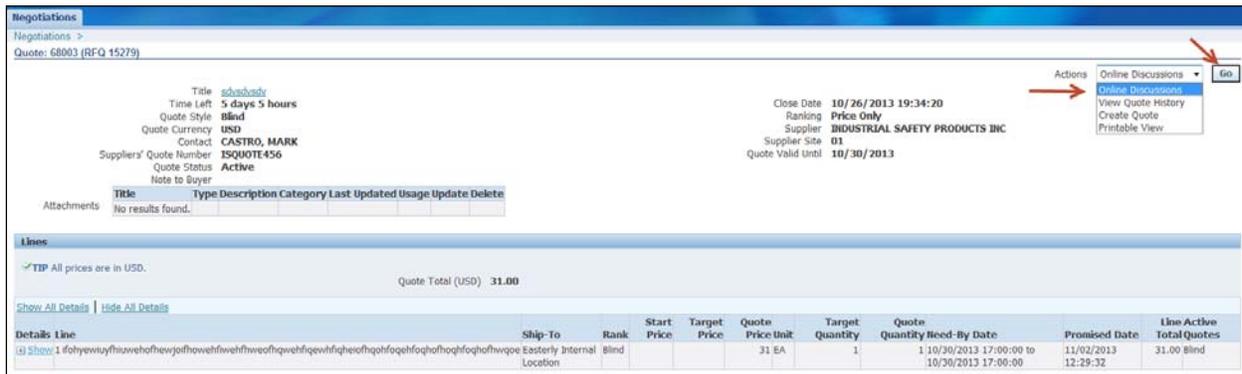
## Creating Online Discussions

Portal supplier users can utilize the **messaging** capabilities to communicate directly with JAA Purchasing Administrators with questions or requests for more information during negotiations. Users will receive updates when message responses are received from JAA personnel.



All active quote responses are listed in the **Your Active and Draft Responses** section of the Home Page.

- 1- Click the **link** under the **Response Number** field to open the response.



The **Quote** window is displayed.

- 2- To initiate the creation of a **discussion**, select the **Create Discussion** value in the **Actions** box.
- 3- Click the **Go** button.

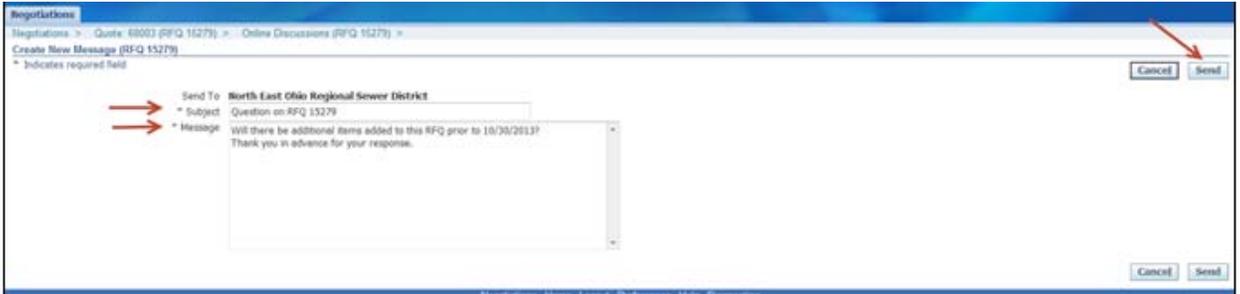


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The **Online Discussions** window is displayed. Any previous messages or replies related to this quote will be listed in the **Messages** region of the window.

- 4- Click the **New Message** button.



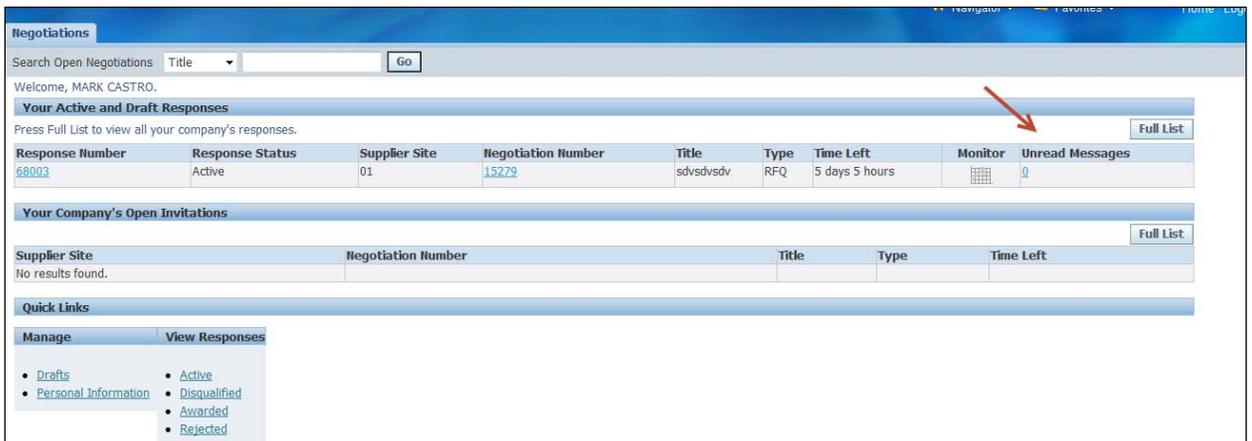
The **Create New Message** window is displayed. The **Send To** is pre-populated with the appropriate JAA recipient address.

- 5- Enter the desired value in the **Subject** field.
- 6- Enter the desired text (up to 240 characters) in the **Message** field (scrolling field).
- 7- Click the **Send** button.



The **Create New Message** window is closed and user is returned to the **Online Discussions** window.

- 8- Note the inclusion of the new discussion record under the **Messages** region of the window.



The message has now been sent directly to JAA purchasing administration.

- 9- Note the **Unread Messages** column in the **Your Active and Draft Responses** section of the **Home Page** window – any reply to your message will display an update to the **link** in this column.

## Summary

Congratulations! You have now learned how to:

- Access the iSupplier portal and Home Page
- Use the Orders tab and related functions
- Use the Shipments tab and related functions
- Use the Finance tab and related functions
- Create and submit invoices
- Create and submit Advanced Shipment Notices
- Perform profile updates through the Admin tab
- Use the Sourcing responsibility to respond to bid requests and communicate directly with JAA purchasing administrators