EAM

Enterprise Application Migration

Training Guide

Oracle Training – iSupplier for End-Users

Jacksonville Aviation Authority (JAA)

JAA | Jacksonville Aviation Authority

**iSupplier
Training Guide**

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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

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

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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
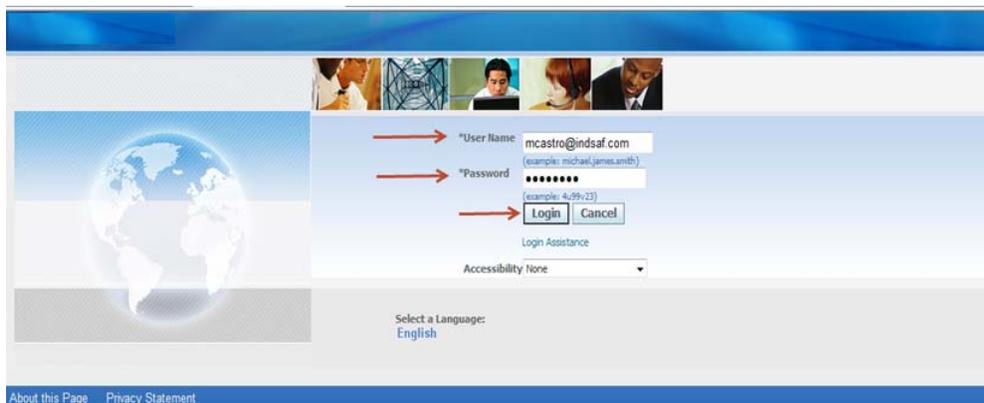
The **Login** screen is displayed.
1- Enter assigned value in the **User Name** field.
2- Enter assigned value in the **Password** field.
3- Click the **Login** button.
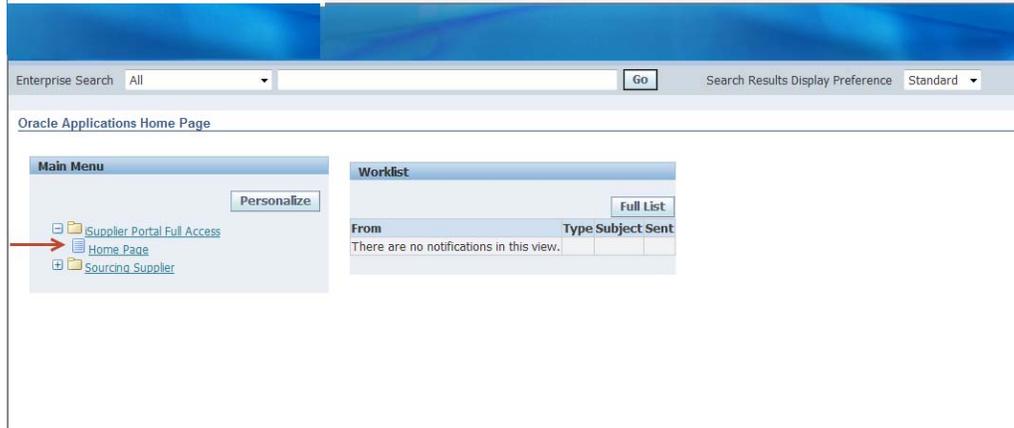
The **Oracle Applications Home Page** is displayed.

    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**.

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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.

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**.

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.

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.

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.

The window is refreshed to display the next 25 records.

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

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

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

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.

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.

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Search results are displayed.
   4- Click the **PO Number** to view additional information for the order.

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.

All **Change Order** history is displayed for the order.
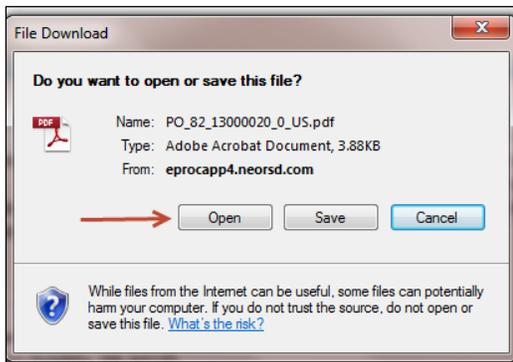   7- Click the **Ok** button to close the window.

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.

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![JAA Jacksonville Aviation Authority logo]

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**.
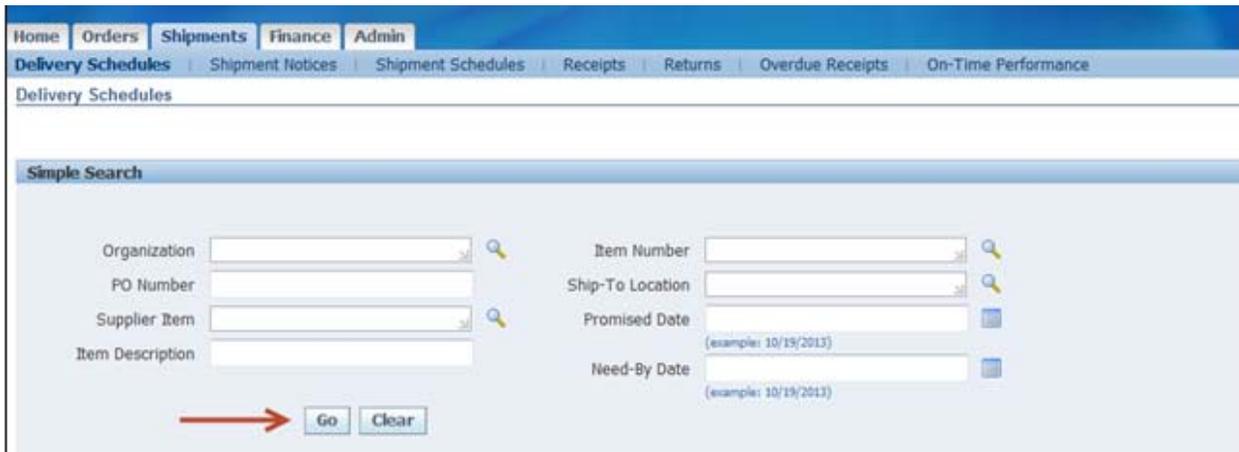
This topic covers:

- 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
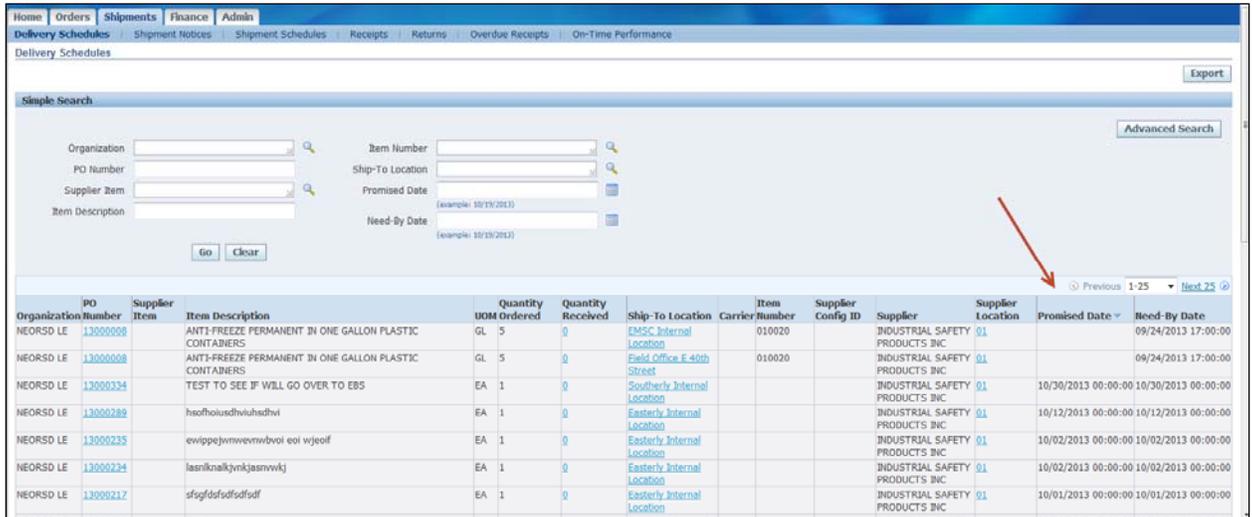
The **Home Page** is displayed.
1- Click on the **Shipments** tab.

The **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.

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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.
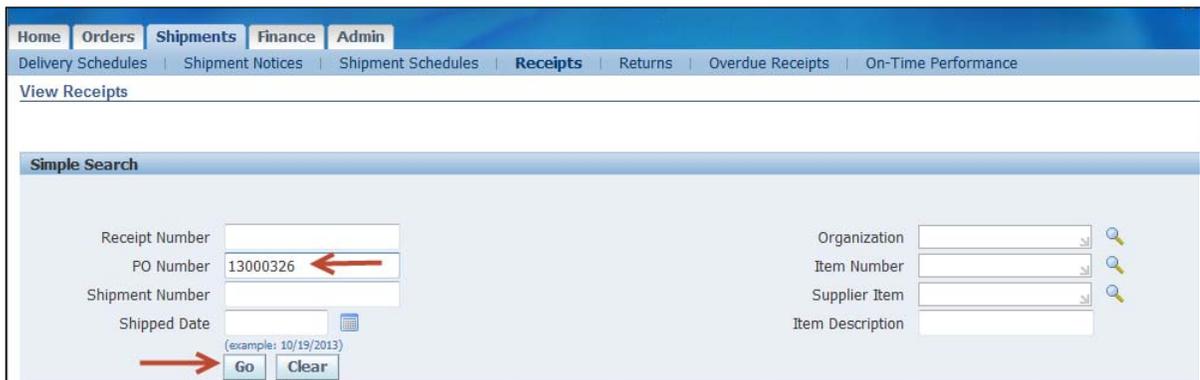
The **View Receipts** window is displayed. Multiple search criteria are available for query.
   2- Enter the **PO Number** value.
   3- Click the **Go** button.

Search results are displayed.
   4-   Click the **link** for the **Receipt Number** to view detail information.

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

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

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

    2-   To view **all** returns information, click the **Go** button.
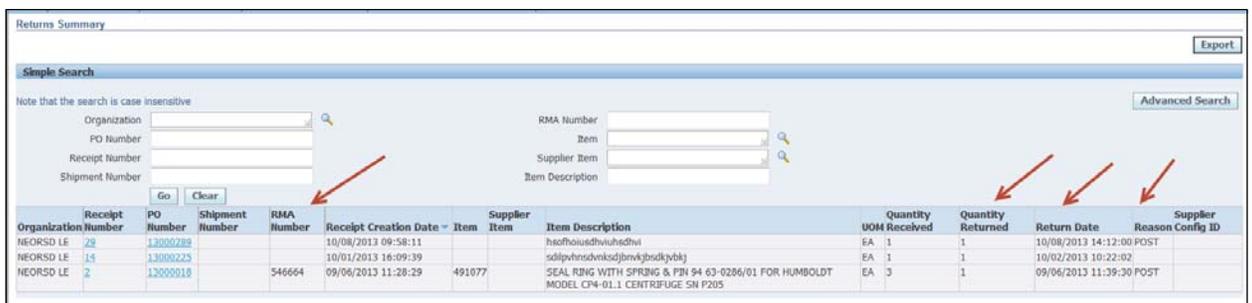
In the search results, detail information for the return is displayed.

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

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

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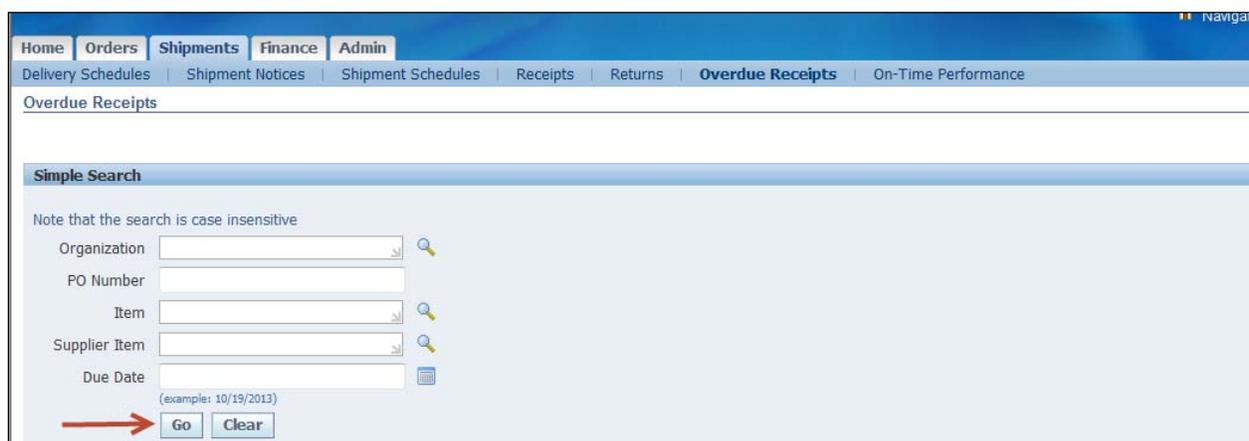
The **Overdue Receipts** window is displayed. Multiple search criteria are available for query.

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

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.

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

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

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.

Performance information for the specific PO is displayed. Note the inclusion of **Delivery Status**.
  4- Click the **Clear** button to perform another search.

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

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

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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.

Search results are displayed in summary for all invoices related to the PO.
4- Click the **link** under **Invoice** to view details.

Detail information for the invoice is displayed.
  5- Note the **Payment Information** summary box.
  6- Click the **Scheduled Payments** tab.

Payment Schedule information for the invoice is displayed.
  7- Click the **Hold Reasons** tab.

Hold and **Release** information for the invoice is displayed.
  8- Click the **Return to Finance, View Invoices** link.

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Payments Information

1- Click the **View Payments** link under the **Finance** tab.
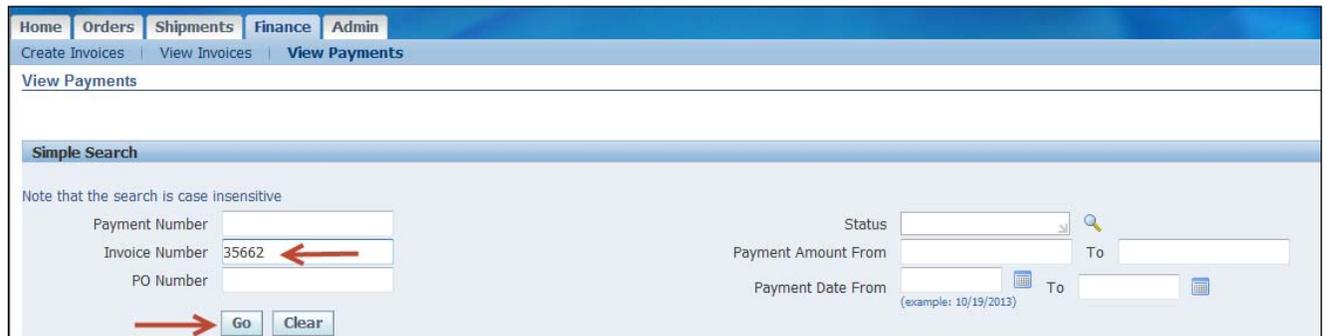
The **View Payments** window is displayed. Note the multiple criteria available for query.
2- Enter the value in the **Invoice Number** field.
3- Click the **Go** button.
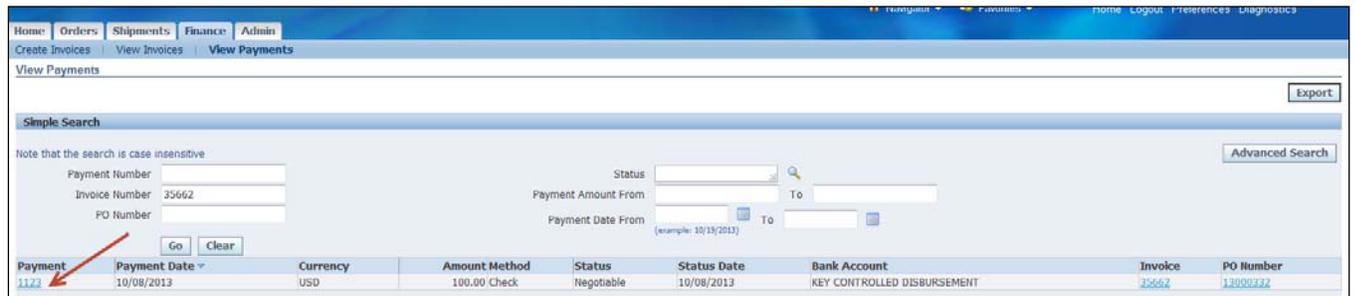
Search results are displayed.
4- Click the **link** under the **Payment** to view detail information.
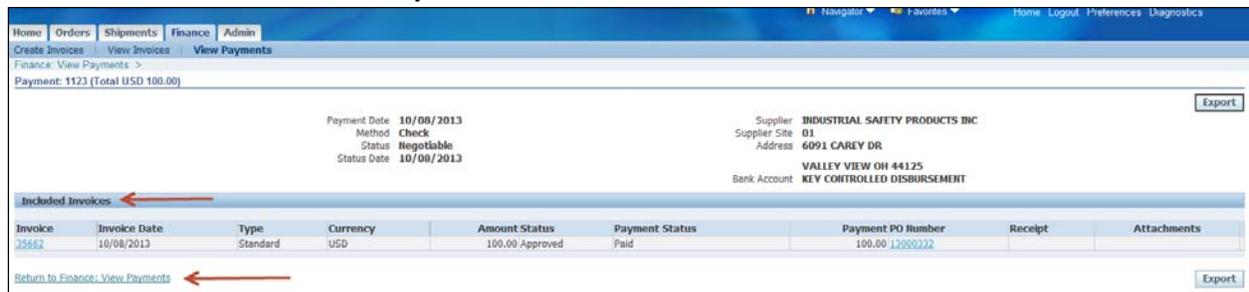
Detail information for the payment is displayed. If desired, user can drill down on details for all **Included Invoices** associated with the payment.

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.
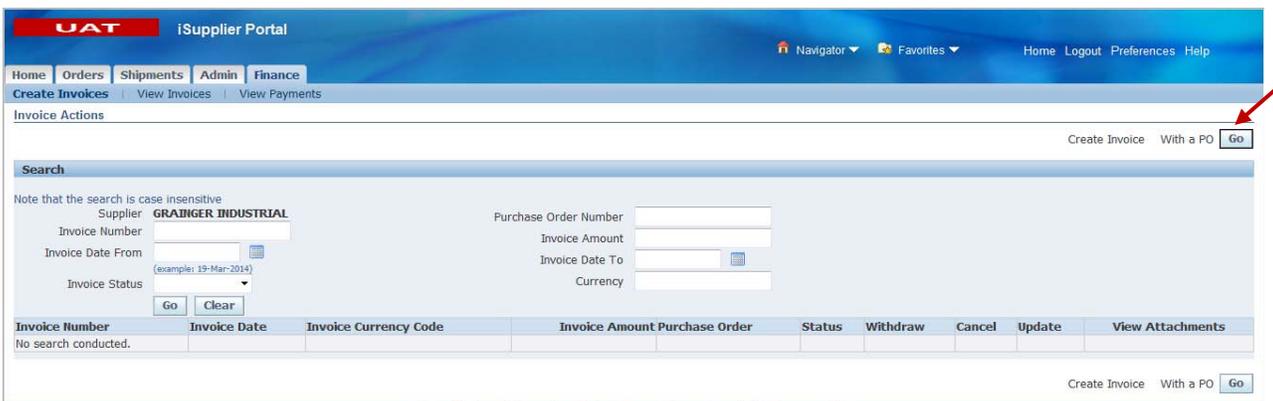
The **Invoice Actions** window is displayed.

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

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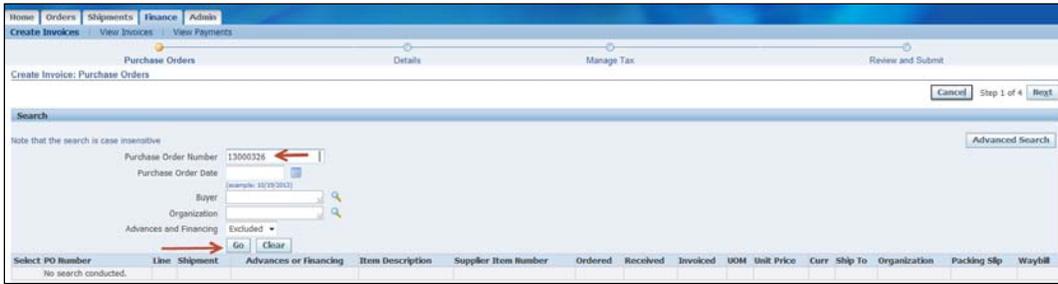
The **Create Invoice: Purchase Orders** window is displayed.

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

   4- Click the **Go** button.
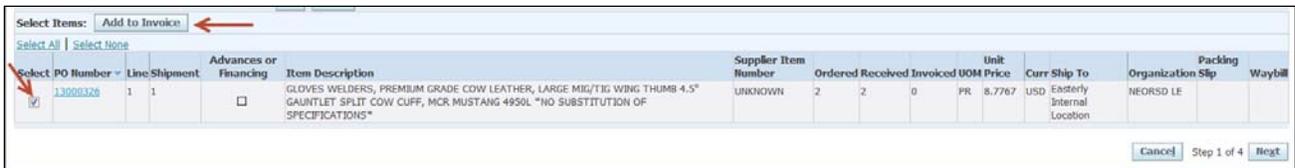
Search results are displayed, showing all eligible PO lines.

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

   6- Click the **Add to Invoice** button.
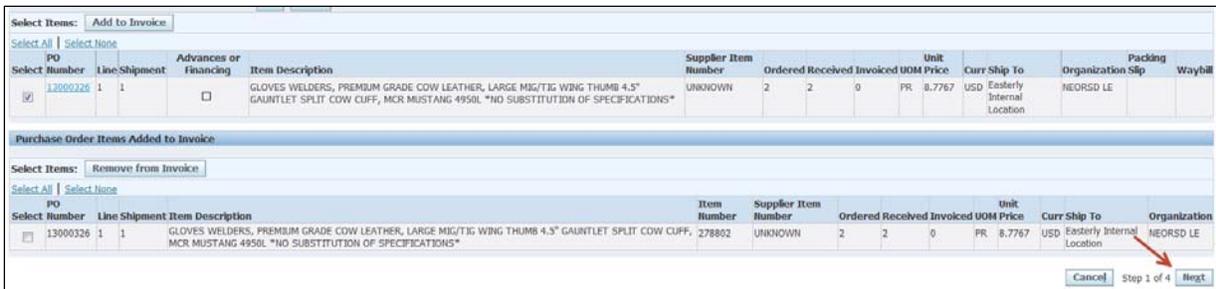
The line is now included in the **Purchase Order Items Added to Invoice** window.

   7- Click the **Next** button.

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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.

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

    9-   Click the **Go** button.

The **Results** window is displayed.
> 10- Use the **Quick Select** button to select the appropriate **Remit To** value.

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).

In the **Customer** section of the window:
> 13- Use the **Search** (magnifying glass) icon to find the appropriate **Customer Tax Payer ID** value.

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

14- Click the **Go** button.

The **Results** window is displayed.

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

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.
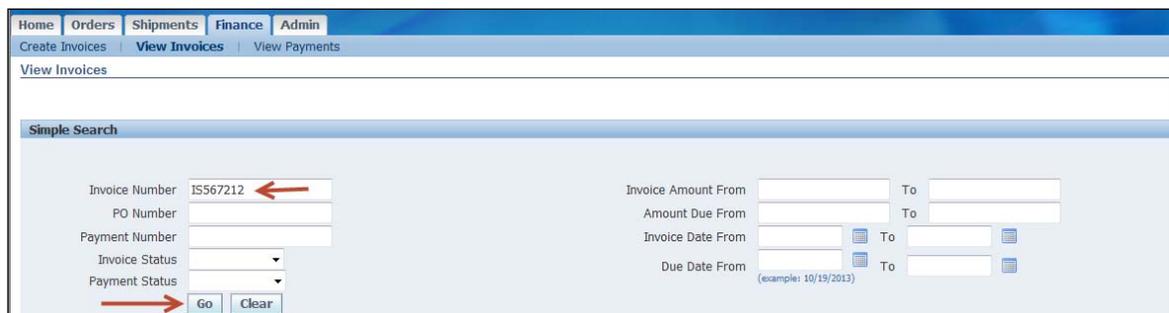
The **View Invoices** window is displayed.
  2- Enter the value in the **Invoice Number** field.
  3- Click the **Go** button.

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

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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.
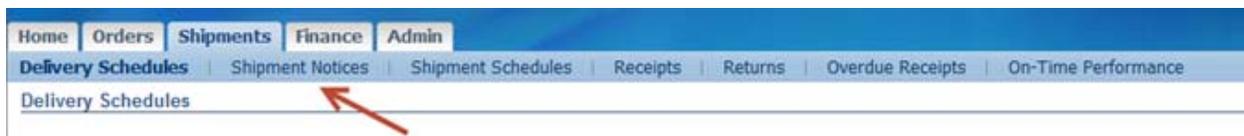
The **Shipments** window is displayed.
    2- Click the **Shipment Notices** link.
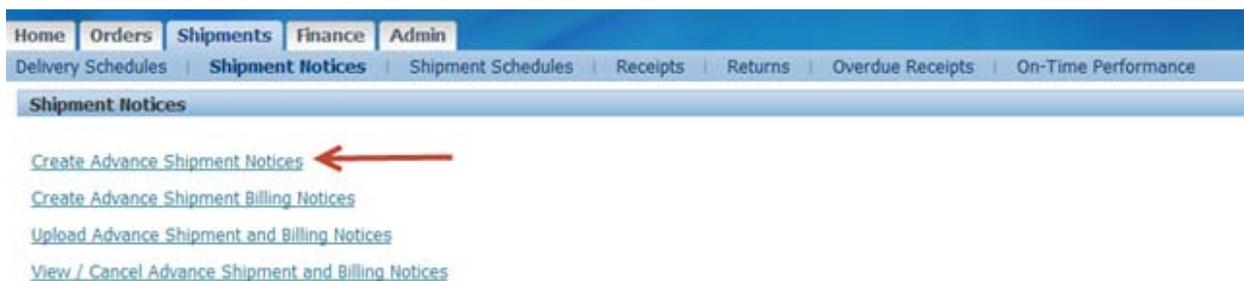
The **Shipment Notices** window is displayed.
    3- Click the **Create Advance Shipment Notices** link.
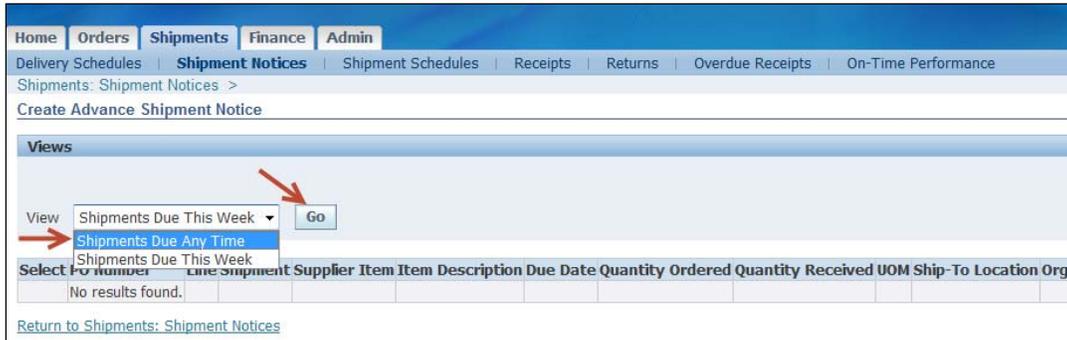
The **Create Advance Shipment Notice** window is displayed. To search for shipments, use the **Views** window.

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

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

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

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

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

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.
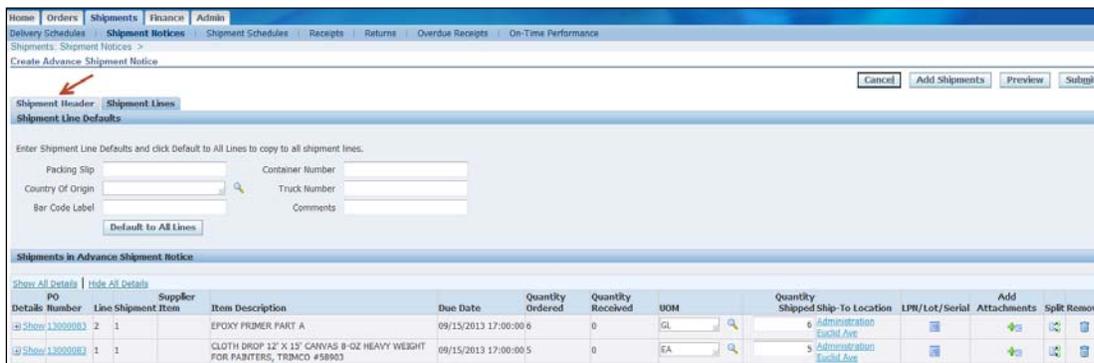
The lines are added in the **Shipments In Advanced Shipment Notice** section of the window.
Note: User can change quantities, remove lines, or split lines as needed from this window.
11- Click the **Shipment Header** tab.
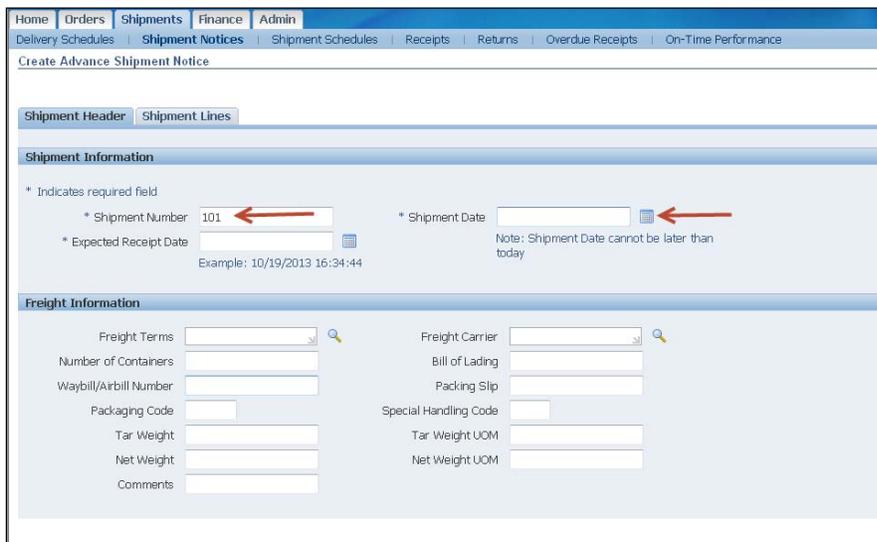
The **Shipment Header** window is displayed. Use this window to complete header information for the ASN.

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.
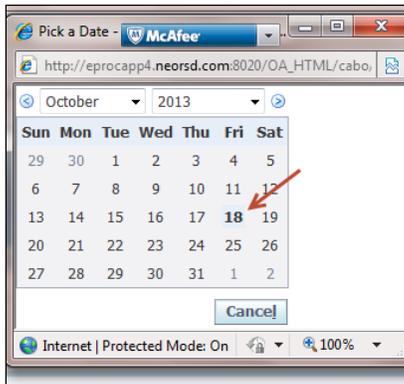
The **calendar** is displayed.

14- Click the appropriate **day** value.
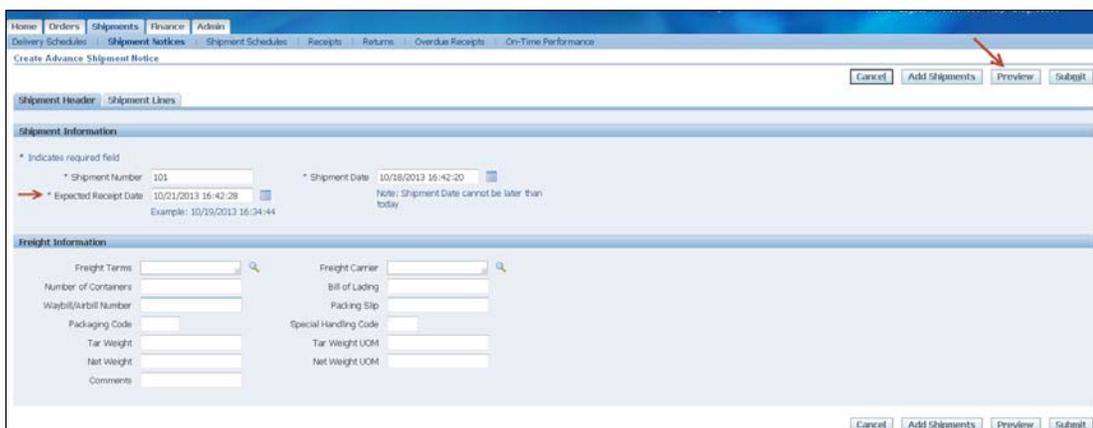
15- Repeat the process to enter the value for the **Expected Receipt Date** field.
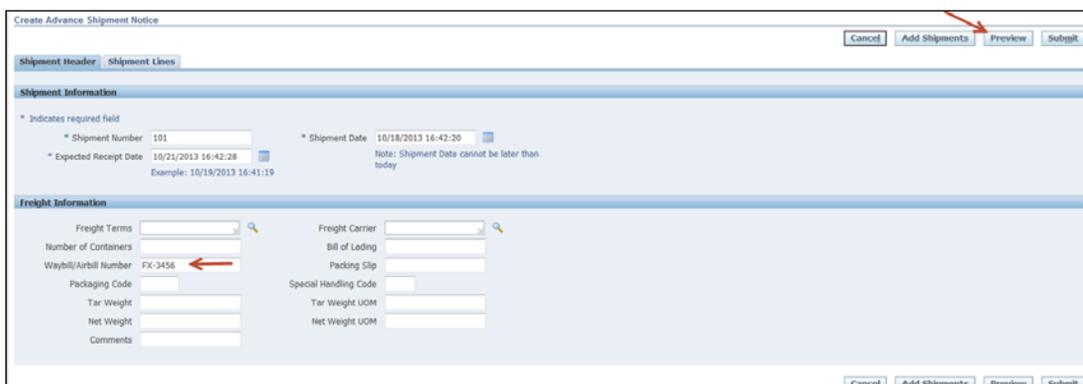
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Use the **Freight Information** section to add additional information if desired:

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

Review the completed ASN information.

   18- Click the **Submit** button.

The **Confirmation** window is displayed.

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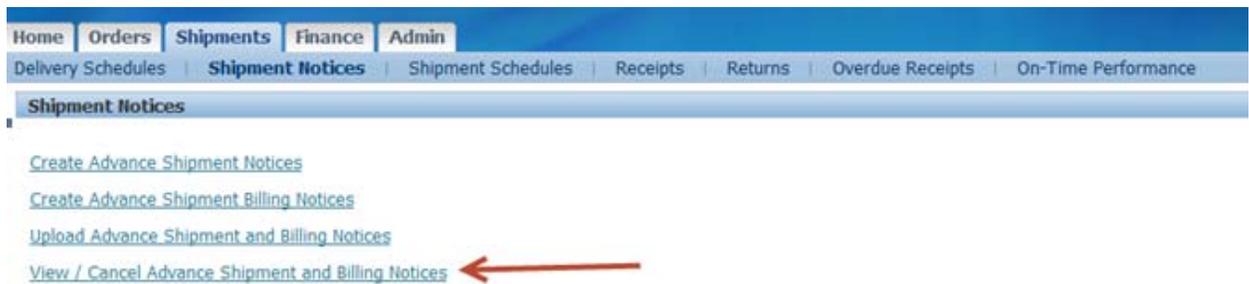
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View Advance Shipment Notices

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: Shipments Notices** link.
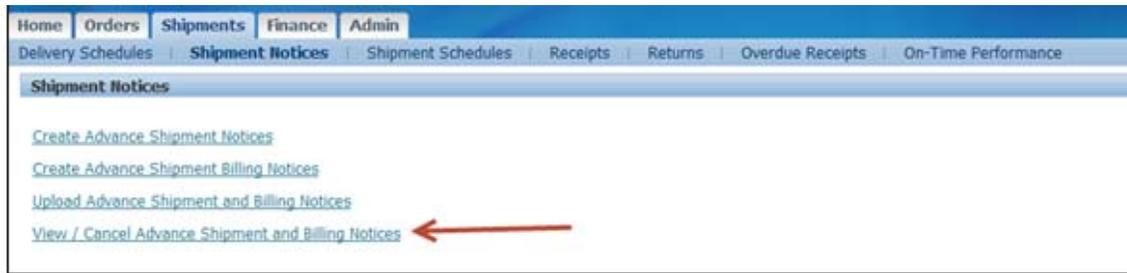
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Cancel Advance Shipment Notices

The **Shipment Notices** window is displayed.
1- Click on the **View / Cancel Advance Shipment and Billing Notices** link.
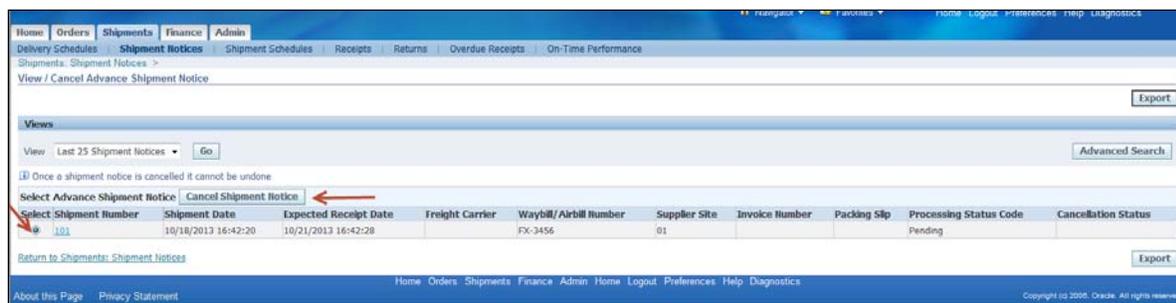
The **Views** window is displayed. Note the default view showing the **Last 25 Shipment Notices** now includes the created ASN.
2- Note the **Processing Status Code** of **Pending** for the newly created ASN.
3- Click the **Select** button next to the **Shipment Number** to be cancelled.
4- Click the **Cancel Shipment Notice** button.
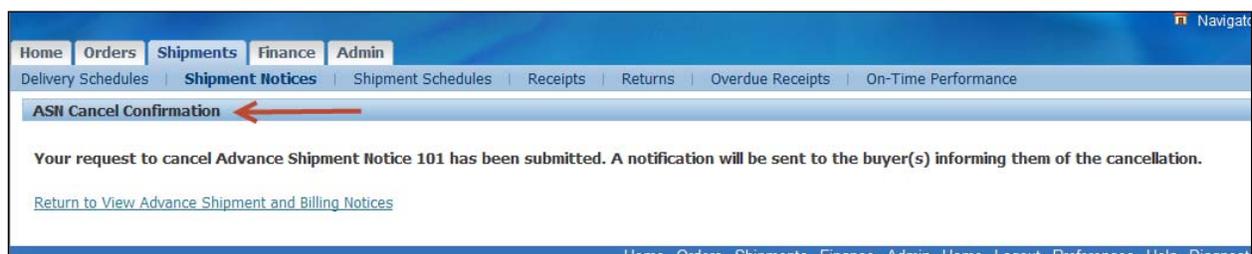
The **Confirmation** window is displayed.
Note: Once a shipment notice is cancelled, it cannot be undone.

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
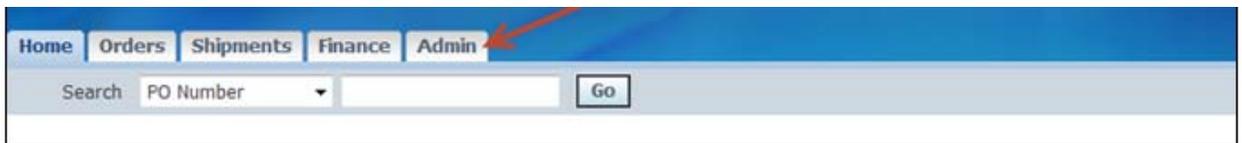
The **Home Page** is displayed.
1- Click the **Admin** tab.
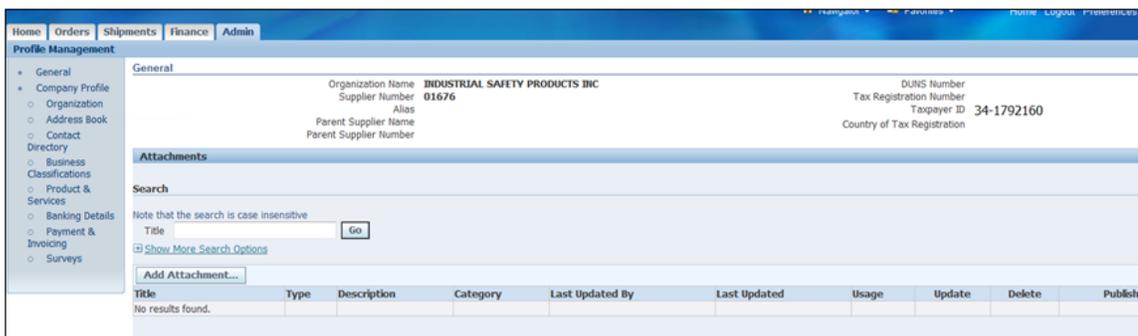
The **Profile Management** window is displayed. Use this window to update all profile information.

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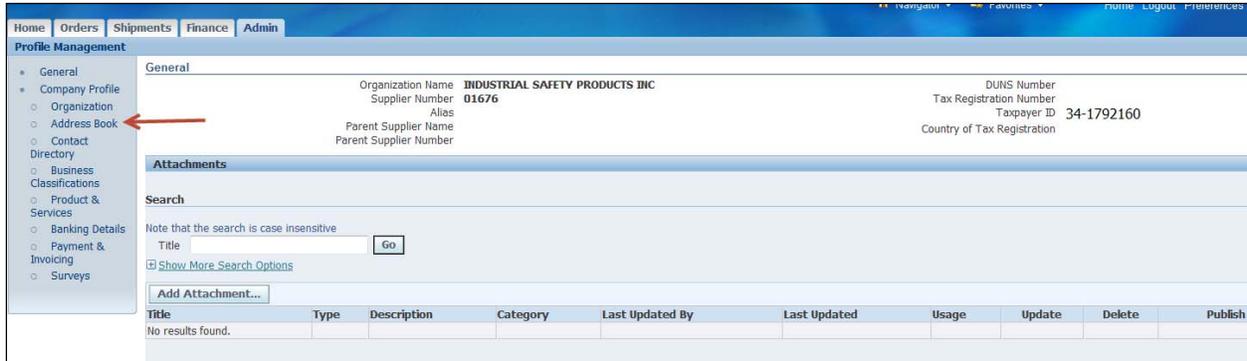
    1- Click the **Address Book** link.

The **Address Book** window is displayed. All current addresses for the supplier are listed here.
    2- Click the **Update** icon.
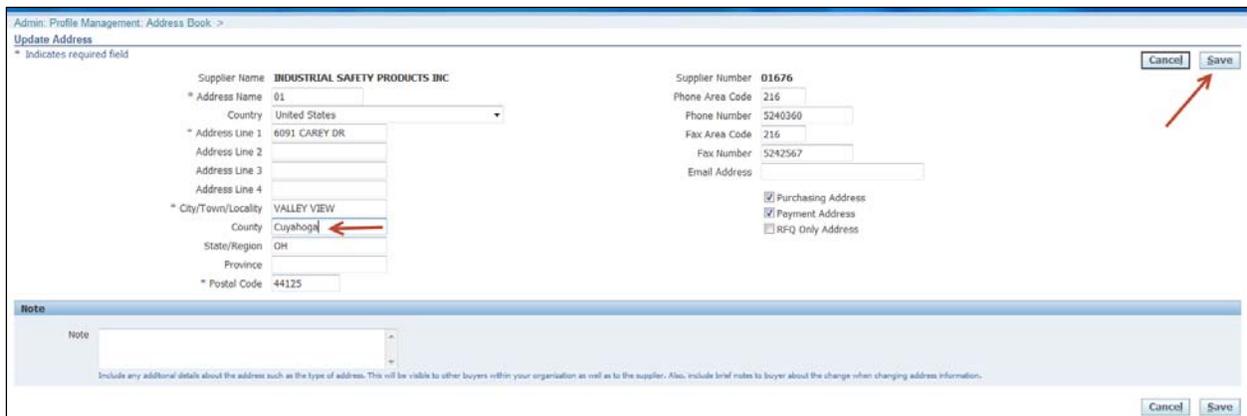
The **Update Address** window is displayed. Use this window to make any changes or additions to address information.
    3- Enter the value in the **County** field.
    4- Click the **Save** button.

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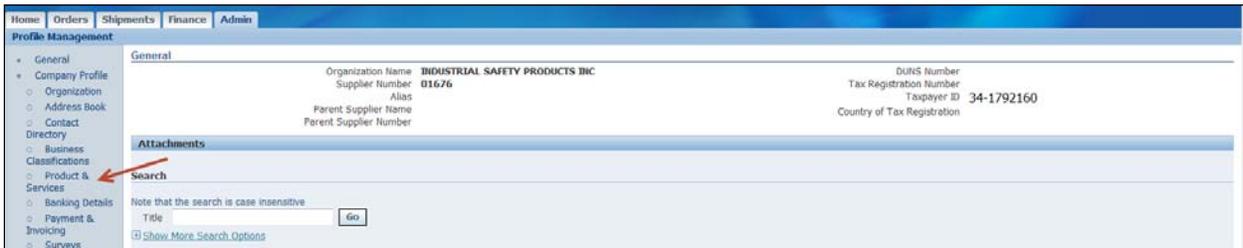
    1- Click the **Products & Services** link.

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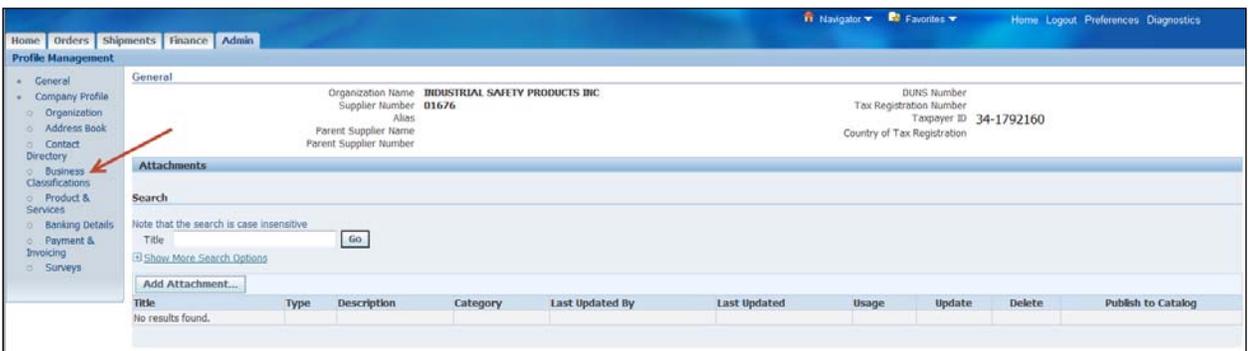
1- Click on the **Business Classifications** link.

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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.

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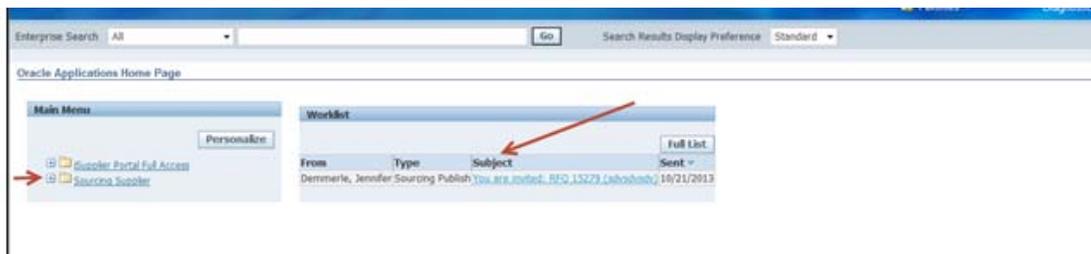
The **Oracle Applications Home Page** is displayed.

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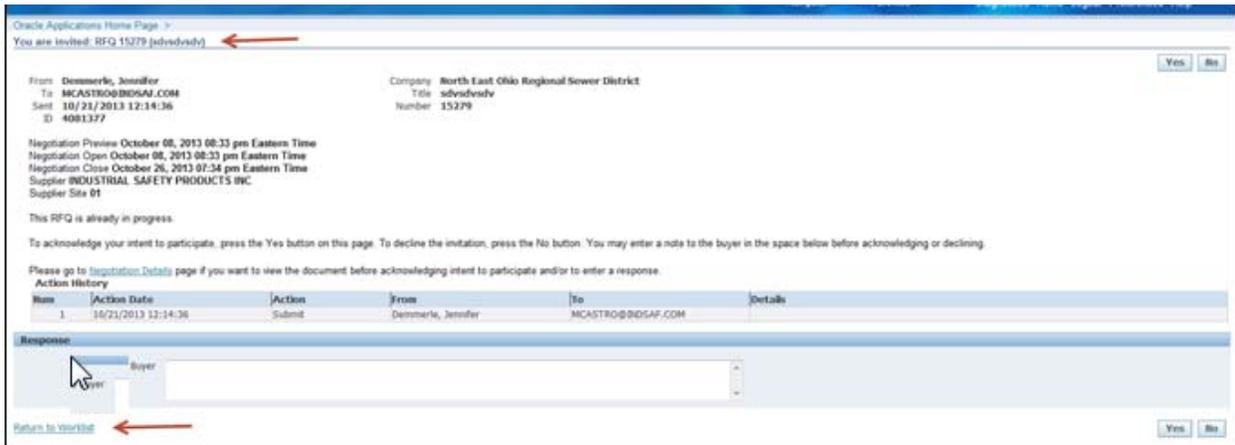
The **Invitation Details** are displayed. Supplier users can respond directly from this screen, or create a separate detailed **quote** for response.

    2-   Click the **Return to Worklist** link.
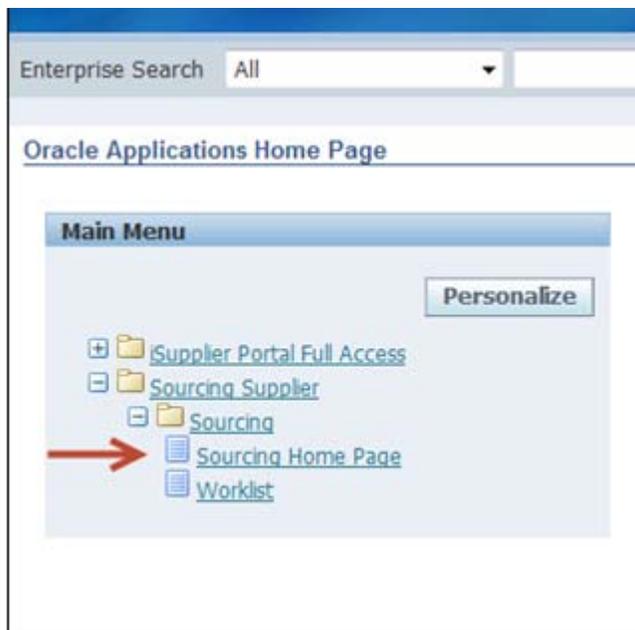
    3-   Use the **Sourcing / Sourcing Home Page** link to navigate to the **Home Page**.
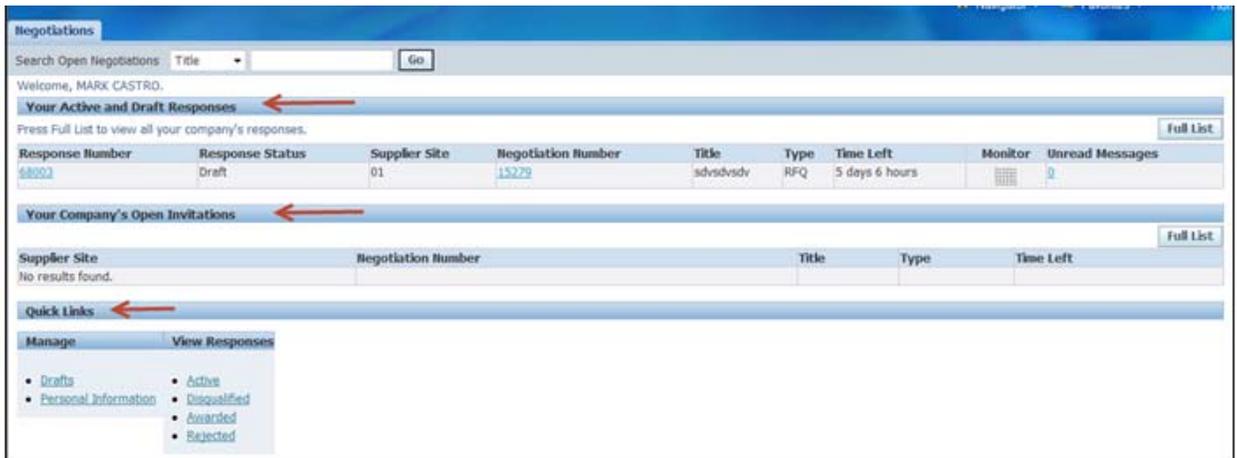
The **Home Page** is displayed.
4- Note the information contained in the **Your Active and Draft Responses** region of the page. You will use this region to navigate directly to all reponses.
5- Note the information contained in the **Your Company's Open Invitations** region of the page. All open invitations 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.
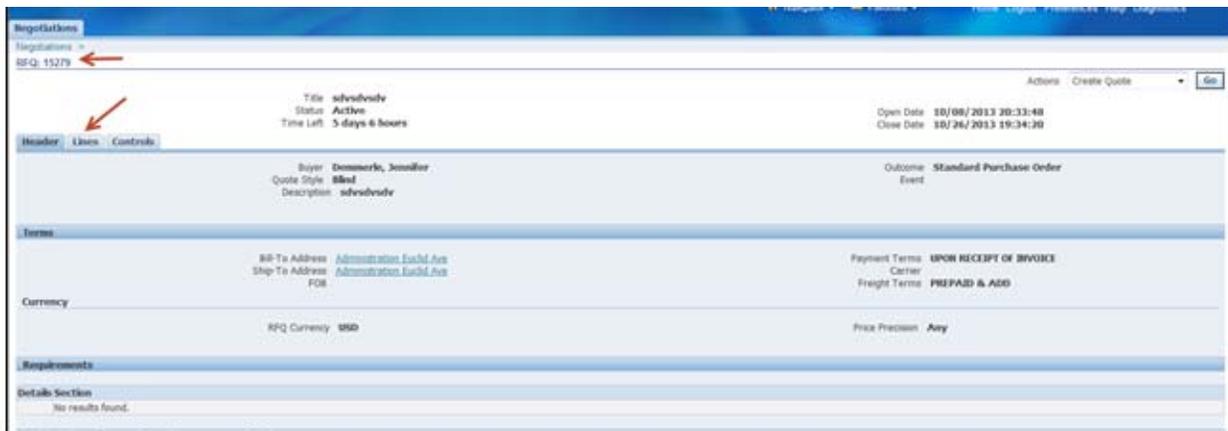
The **Negotiations** window is displayed, showing **summary** information for the RFQ.
    2- Click on the **Lines** tab to access the lines of the RFQ.
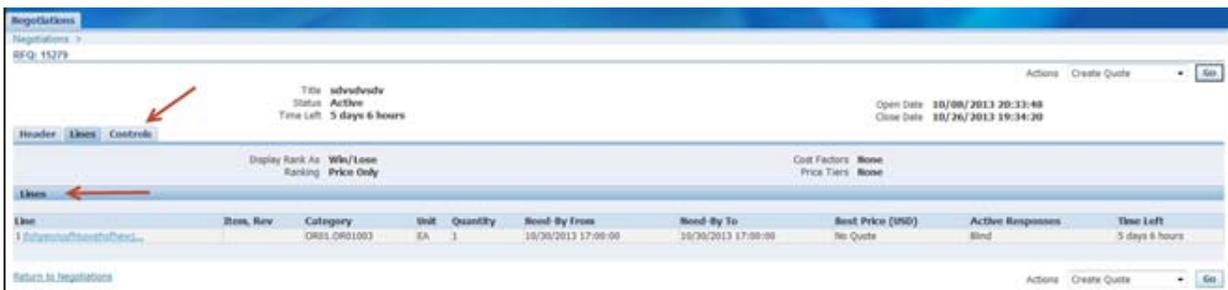
The **RFQ Lines** window is displayed, showing all detail lines information for the RFQ.
    3- Click on the **Controls** tab to view response rules for the RFQ.
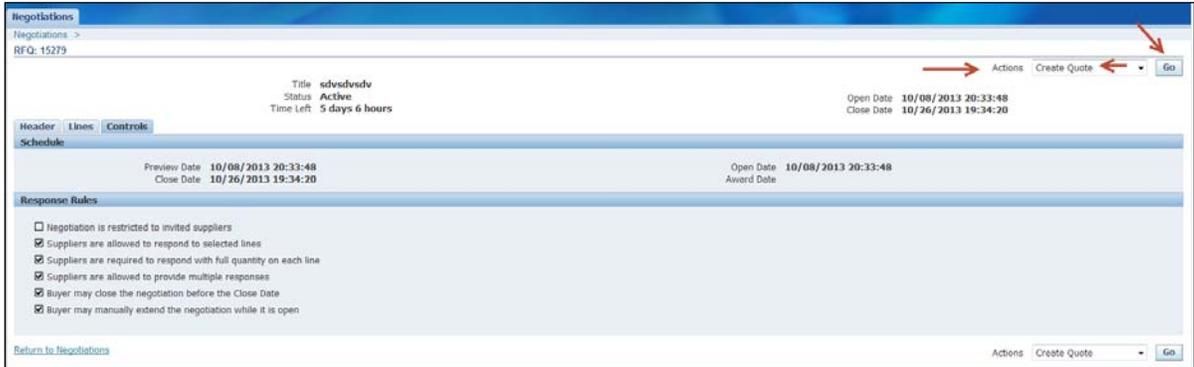
The **Controls** window is displayed, listing the **Schedule** information and all valid **Response Rules** established by JAA for the RFQ.

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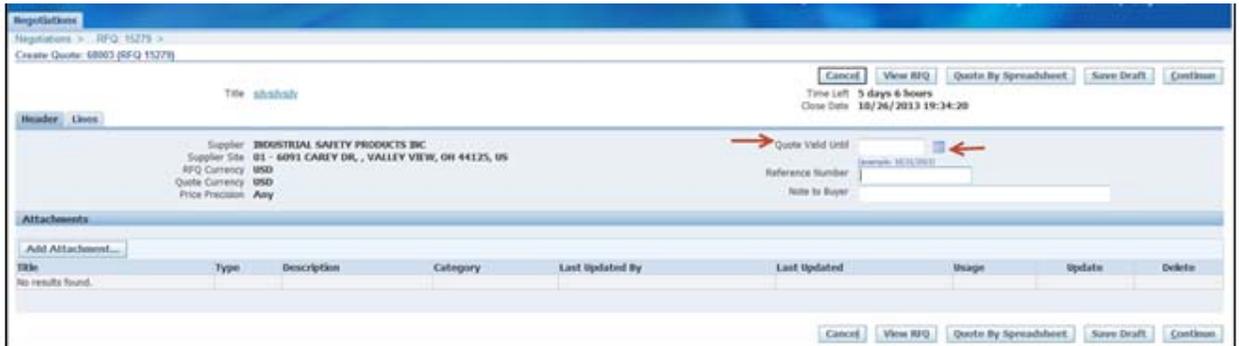
The **Create Quote** window is displayed. The window defaults to the **Header** area of the quote.

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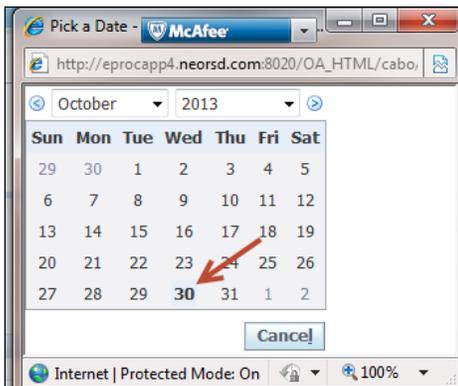
The **Calendar** window is displayed.

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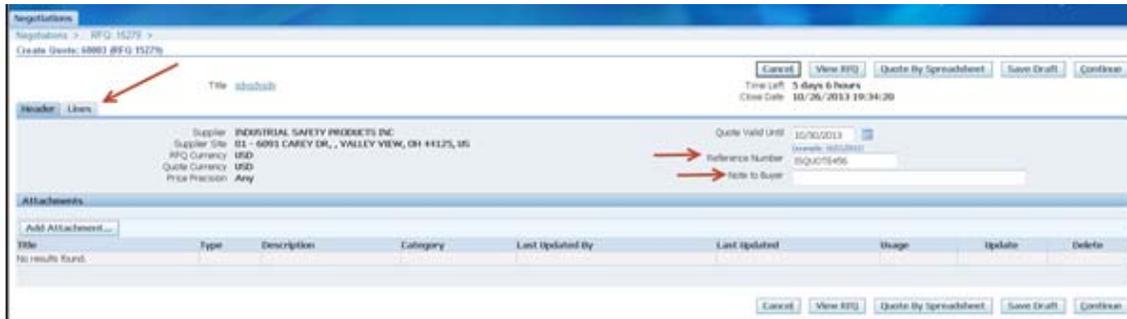
9- Enter the value for the **Reference Number** of the quote response.
10- If desired, enter a **Note to Buyer** (up to 240 characters) in the designated field.
11- Click the **Lines** tab.

The **Lines** window is displayed.
12- Enter the **Quote Price** and **Promised Date** for each line.
13- When complete, click the **Continue** button.
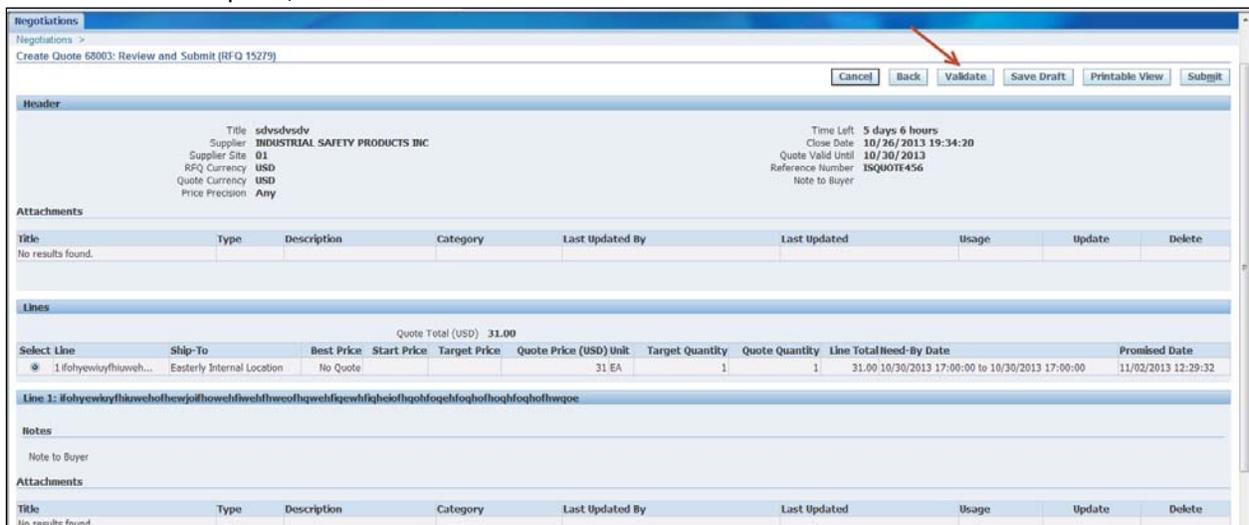
The **Review and Submit** window is displayed.

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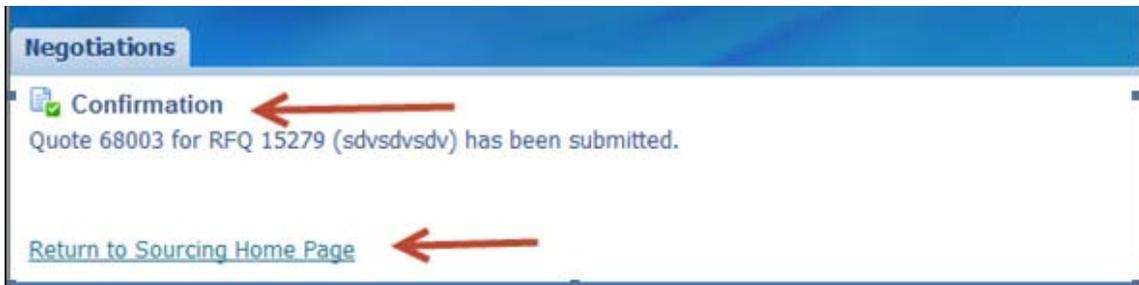
The **Confirmation** window is displayed to confirm successful submission of the quote.

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.
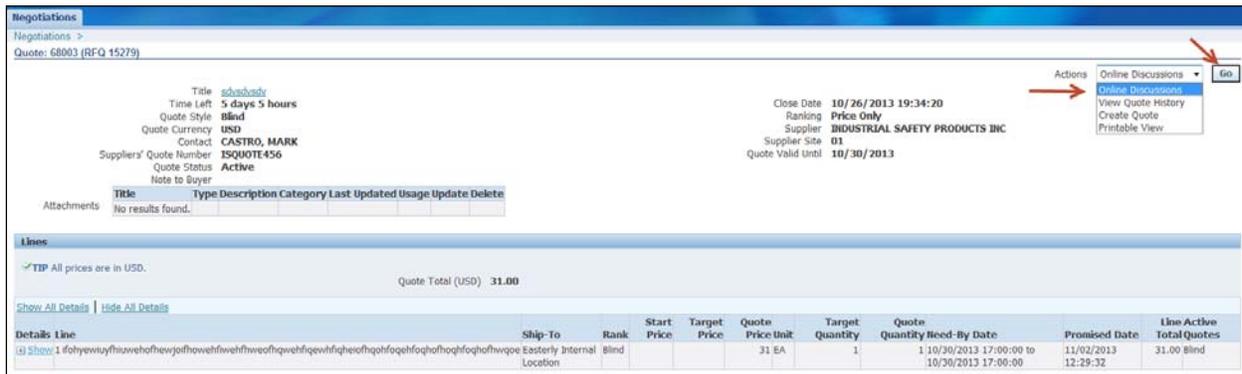
The **Quote** window is displayed.

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

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.
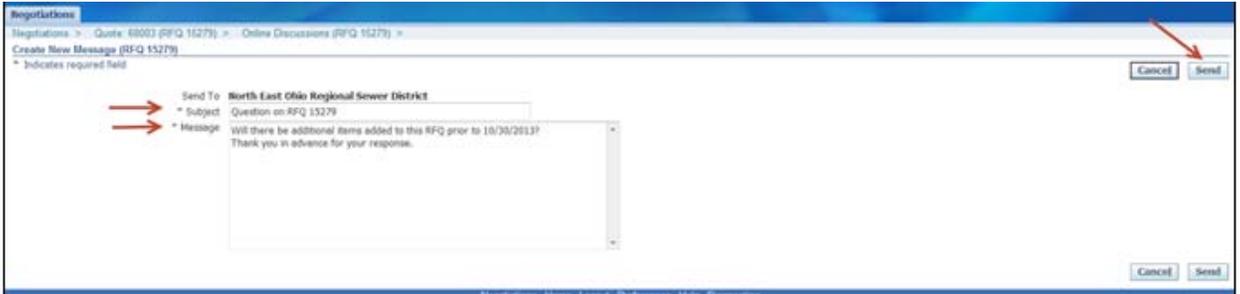
The **Create New Message** window is displayed.   The **Send To** is pre-populated with the appropriate JAA recipient address.
   5- Enter the desired value in the **Subject** field.
   6- Enter the desired text (up to 240 characters) in the **Message** field (scrolling field).
   7- Click the **Send** 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.
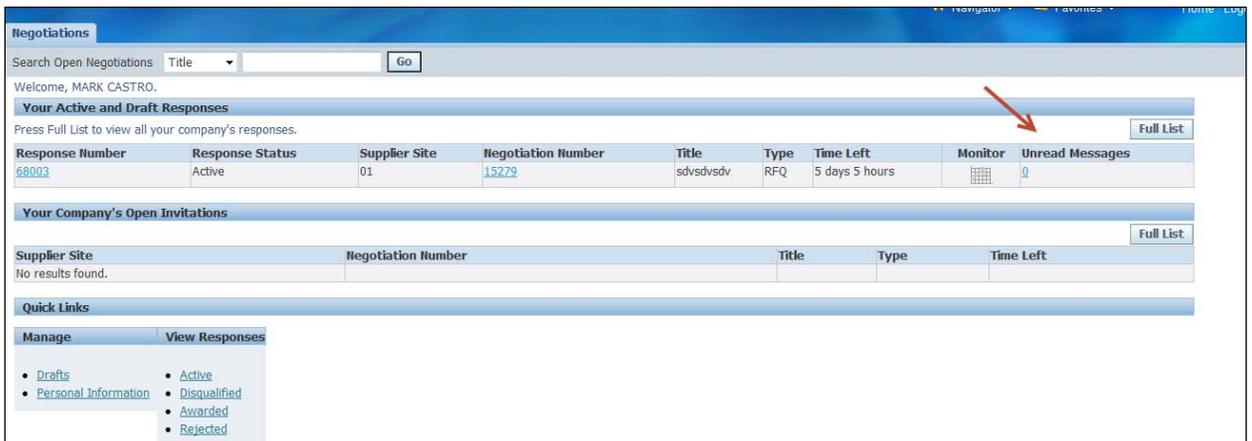
The message has now been sent directly to JAA purchasing administration.

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