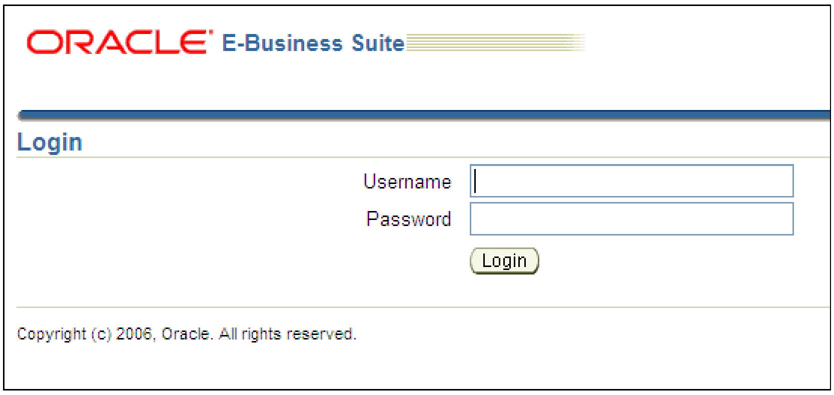
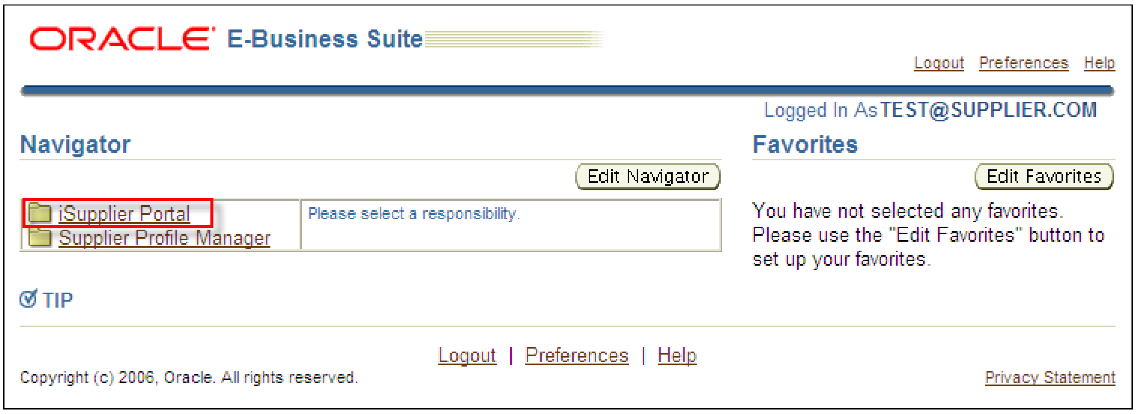
iSupplier

Quick Guide
iSupplier Portal Navigation

This job aid highlights the key functionality of Yale's new supplier inquiry solution, the iSupplier Portal. There are two different responsibilities that can be assigned to an iSupplier Portal user:

- **iSupplier Portal read-only access –** all users with access to the iSupplier Portal have this responsibility. Users can view purchase orders, invoices, payment status, and supplier master data.
- **Supplier Profile Manager –** only designated users from each supplier have this responsibility. In addition to viewing the information listed above, these users maintain the supplier master data (contacts, addresses, business classifications, and banking information).

The steps below demonstrate how to access the iSupplier Portal and highlight the major functionality:

<table>
<tr><td>1</td><td>Access the iSupplier Portal (the link is available in the original registration email from Yale)</td></tr>
<tr><td>2</td><td>Enter your Username and Password and click Login

</td></tr>
<tr><td>3</td><td>Click on iSupplier Portal to view purchase orders, invoices, and payment status


Note: Only the iSupplier Portal read-only access is covered in this job aid</td></tr>
</table>

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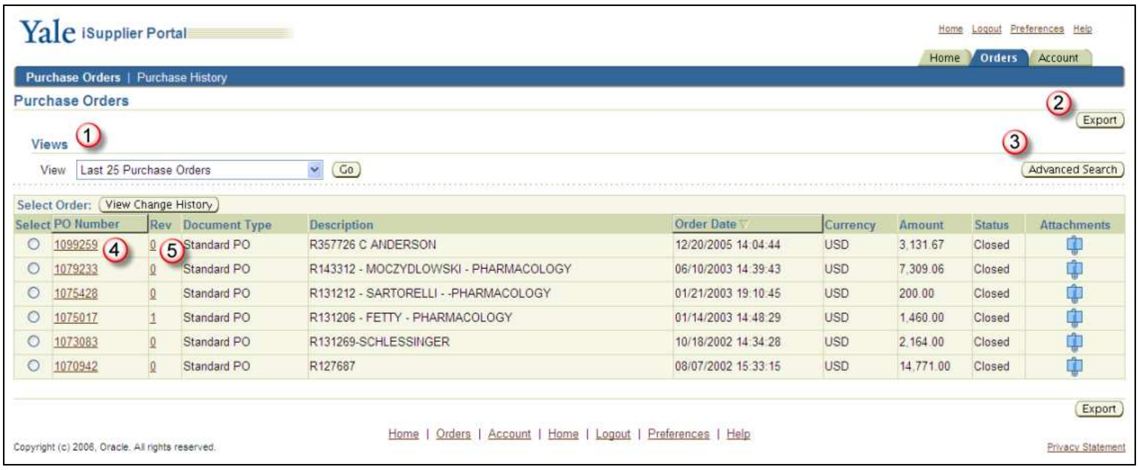
The **iSupplier Portal Home Page** is displayed

1. **Global Links** are available on all iSupplier pages
   - Home: Returns users to the Oracle E-Business Suite homepage where you can select another responsibility, if applicable
   - Logout: Logs you out of the iSupplier Portal
   - Preferences: Allows you to set user preferences
   - Help: Opens Oracle's iSupplier Portal Help
2. **Tabs** are used to organize pages within the iSupplier Portal. The Orders tab will display purchase orders and the Account tab will display the invoices and payments pages. The Admin tab gives users read-only access to the supplier master data.
3. **Search** enables you to search directly for a specific purchase order, invoice, or payment. To search;
   1. Select a document type (purchase order, invoice, or payment) from the drop-down list
   2. Enter the appropriate number
   3. Click Go
4. The **Notifications** section displays the most recent open notifications. Notifications are messages that users receive from Yale; notifications are also sent to the user's registered email address. Click the Full List button to access the notifications page and view all notifications
5. **Orders At a Glance** displays the five most recent purchase orders. Click on a PO number link to view purchase order details.
6. **Quick Links** on the right of the screen display links to pages for viewing orders, invoices, and payments. Click on any link to go directly to the corresponding page.

5 To view a **Purchase Order** click on the Purchase Orders quick link or the Orders tab

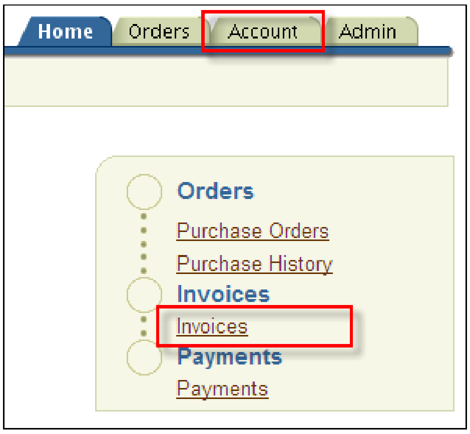
6 The **Purchase Order Home Page** is displayed



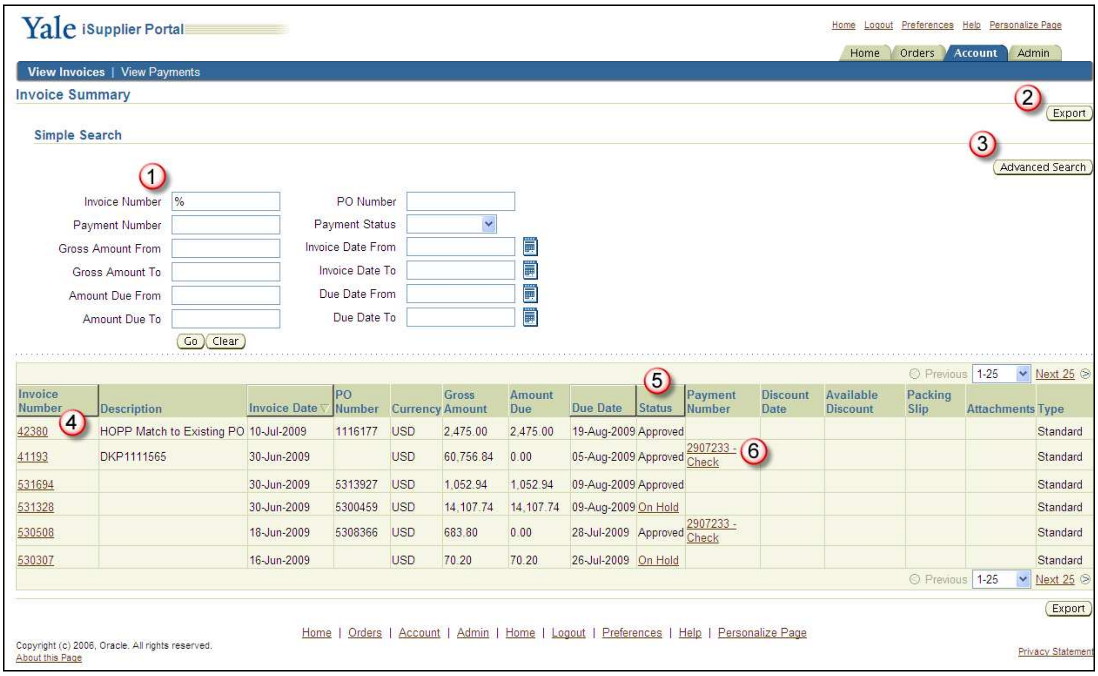
1. The **View** dropdown menu allows you to view the last 25 Purchase Orders or all Purchase Orders

   Note: The two other options "Purchase Orders to Acknowledge" and "Purchase Orders Pending Supplier Change" are currently not in use.
2. The **Export** button is used to export the information to a spreadsheet
3. Use the **Advanced Search** to add more search criteria
4. Click on the **PO Number** to get additional detailed information about the selected order
5. The **Revisions (Rev)** column displays the number of revisions associated with the PO. If the value under the Rev column is greater than 0, click on the revision number to see the list all the revisions. *Note: Revisions can only be made by Yale Procurement.*

7 To view an **Invoice** click on the Invoices quick link or the Account tab

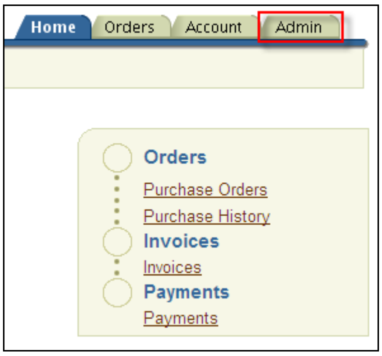


8 The **Invoice Summary Page** is displayed:

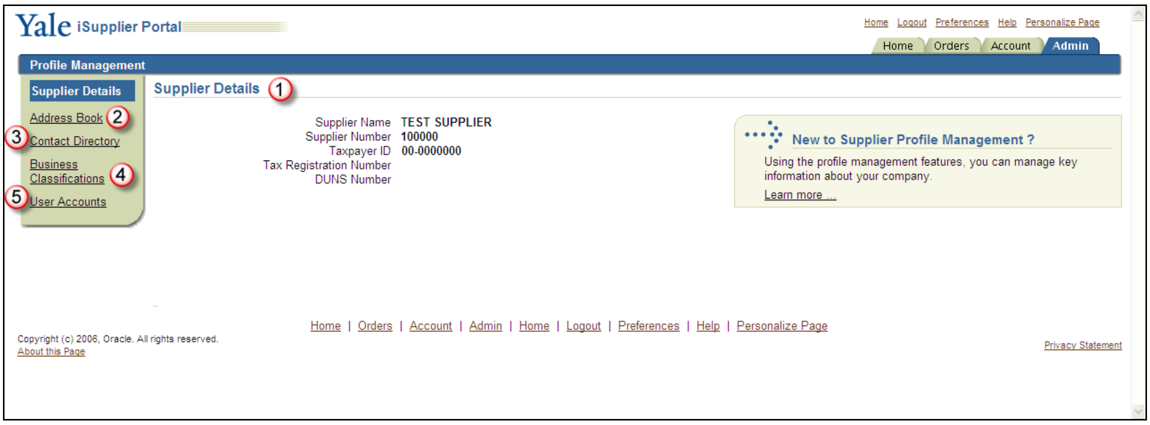


1. Use the **Simple Search** fields to find a specific invoice or leave the fields blank and click "Go" to display all invoices
2. The **Export** button is used to export the information to a spreadsheet
3. Use the **Advanced Search** to add more search criteria
4. Click on the **Invoice Number** to get additional detailed information about the selected invoice
5. Click on the **Status** column to view invoices sorted by approved or on hold status. Click on the "On Hold" link to view the hold reason.
6. Click on the **Payment Number** of a specific invoice and a new page will open with the payment information.

9 To view general information regarding your company on the **Profile Management** page, click on the Admin tab:



10 After clicking the Admin tab, the **Supplier Details Page** is displayed:



1. The **Supplier Details** page has general information about the supplier
2. The **Address Book** shows the various sites associated with the supplier
3. The **Contact Directory** shows all contacts associated with the supplier
4. The **Business Classifications** page displays any classifications (e.g. minority owned, small business) that apply to your company
5. The **User Accounts** page lists all users with active accounts that can access the portal on behalf of your company

Note: This view is read-only. To edit this information and bank accounts, the administrator for your company needs to request changes through the Supplier Profile Manager link on the Oracle E-Business Suite homepage.