TRAINING GUIDE – ORACLE iSUPPLIER PORTAL

iSUPPLIER PORTAL FUNCTIONS

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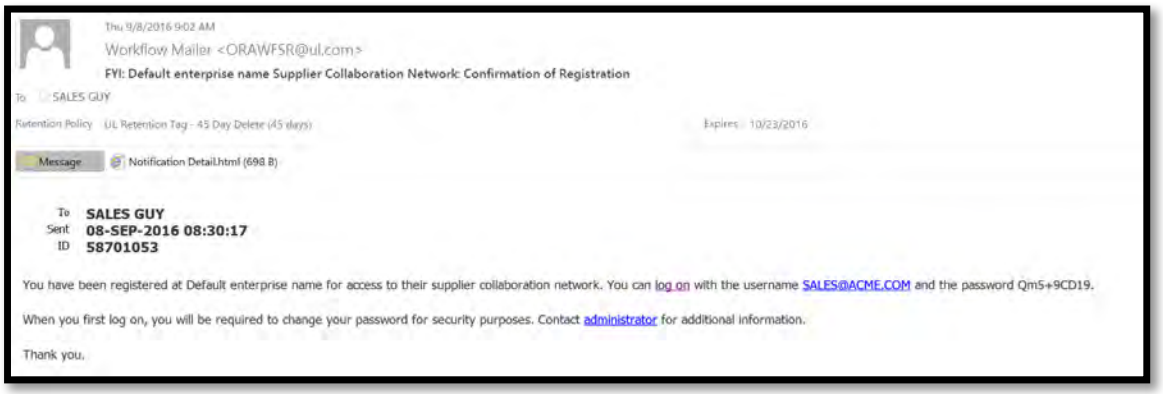
LOG IN PAGE

Navigate to the URL that is provided by UL

https://supplier.ul.com

1. Enter your user name (will be your email address)
2. Enter your password (will be system generated and sent to you via email)
    a. You will need to change your password the first time you log in
    b. Password will need to be at least 8 characters, contain 1 number, no repeating characters and cannot have been used within the last six months.
3. Click the login button
4. Email example:



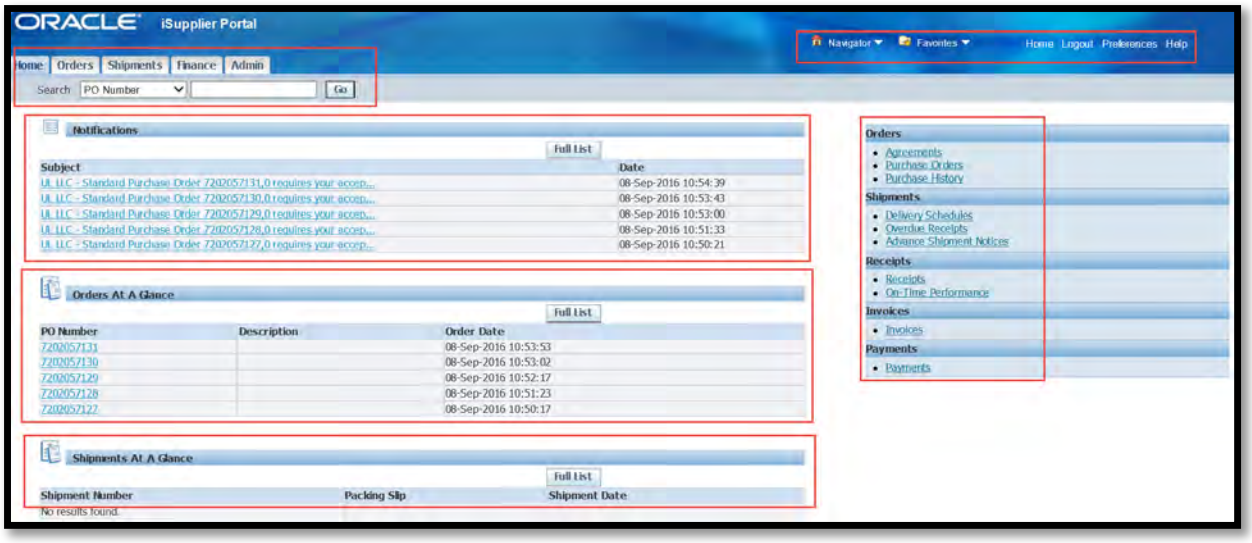
ISUPPLIER PORTAL HOMEPAGE

After logging into Oracle and choosing the iSupplier responsibility, the first screen you will see is the iSupplier home page. The Home Page provides top level access to all iSupplier menus, submenus, links and web forms. The users can navigate by selecting the menu tabs or by clicking on the subsequent purchasing process nodes.

Note: If you have more than one responsibility you will be taken an initial page to select your responsibility

Oracle Responsibility: UL iSupplier Portal Admin or UL iSupplier Portal User

Navigate: iSupplier Homepage



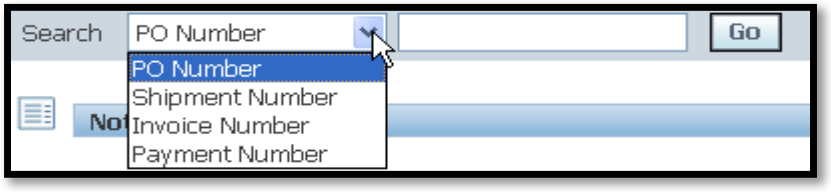
NAVIGATION AND SEARCHING

Homepage Overview

1. Quick Links
    a. This section is displayed on the right and provides a high-level diagram of the procure-to-pay flow through the Oracle iSupplier Portal application. Click any link to go directly to the corresponding page.
2. Notifications
    a. Notifications are messages waiting for your review. Some notifications are view-only, while other notifications require action. To view your notifications, click the linked subject to open the **Notification Details** page. This page provides complete notification details, as well as the appropriate action button.
3. Orders At A Glance
    a. The last five purchase orders issued to your company will be listed in this section of the homepage. Click on the PO number to drill to the details. Click the full list button to go to the full list of PO's on the Order's tab.
4. Shipments At A Glance
    a. The last five shipments that you have entered into the system will be listed in this section of the homepage.
5. Home Page Links (upper right hand corner)
    a. Home - Returns you to the main portal where you can select another responsibility or application.
    b. Logout - logs you out of the application.
    c. Preferences - Displays the **Preferences** page.
    d. Help - Accesses the help page

Searching

1. Quick Search - The Quick Search feature is available to you from the **Home** page. Using Quick Search, you can look for
    a. Purchase orders
    b. Invoices
    c. Payments



d. To use the Quick Search:
    1. Select the search type from the Search menu.
    2. Enter a search value.
    3. Click Go.

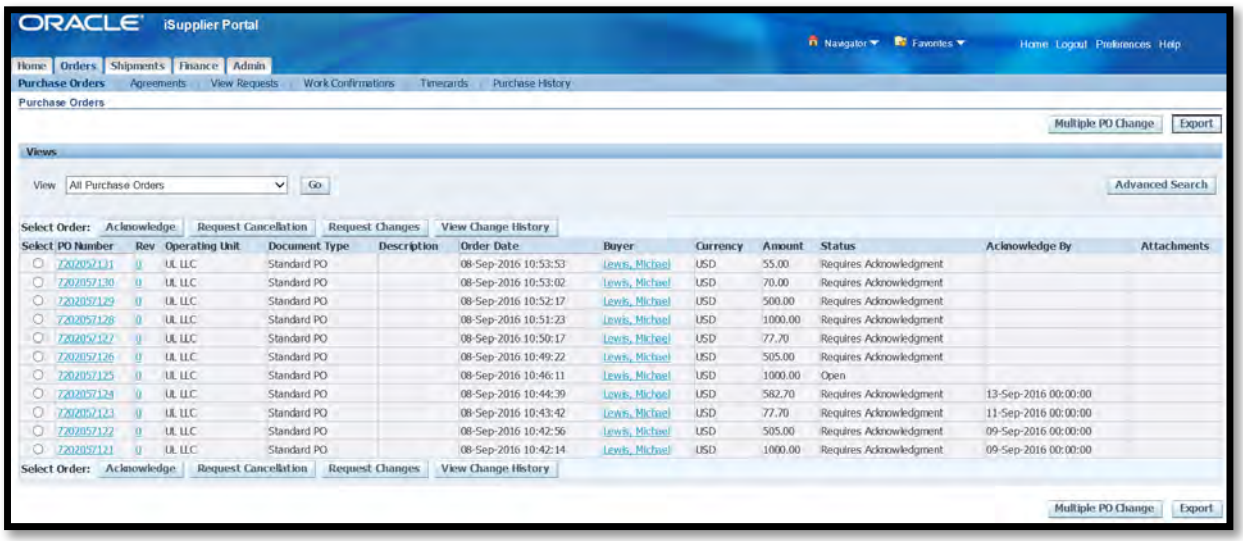
ORDER INFORMATION AND ACTION

PURCHASE ORDERS

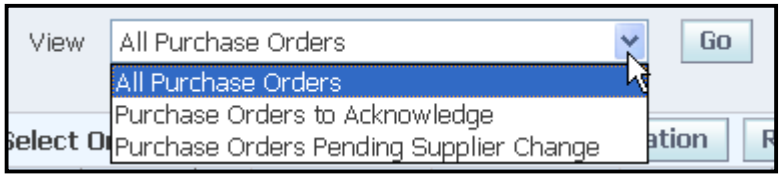
Using purchase order information, you can acknowledge purchase orders, make change requests to purchase orders, split shipments, or cancel orders. You can also view supplier agreements and the revision history of a purchasing document. When the buying company enters a purchase order in Oracle Purchasing, the purchase order details are available to you in Oracle iSupplier Portal.

Viewing Purchase Orders

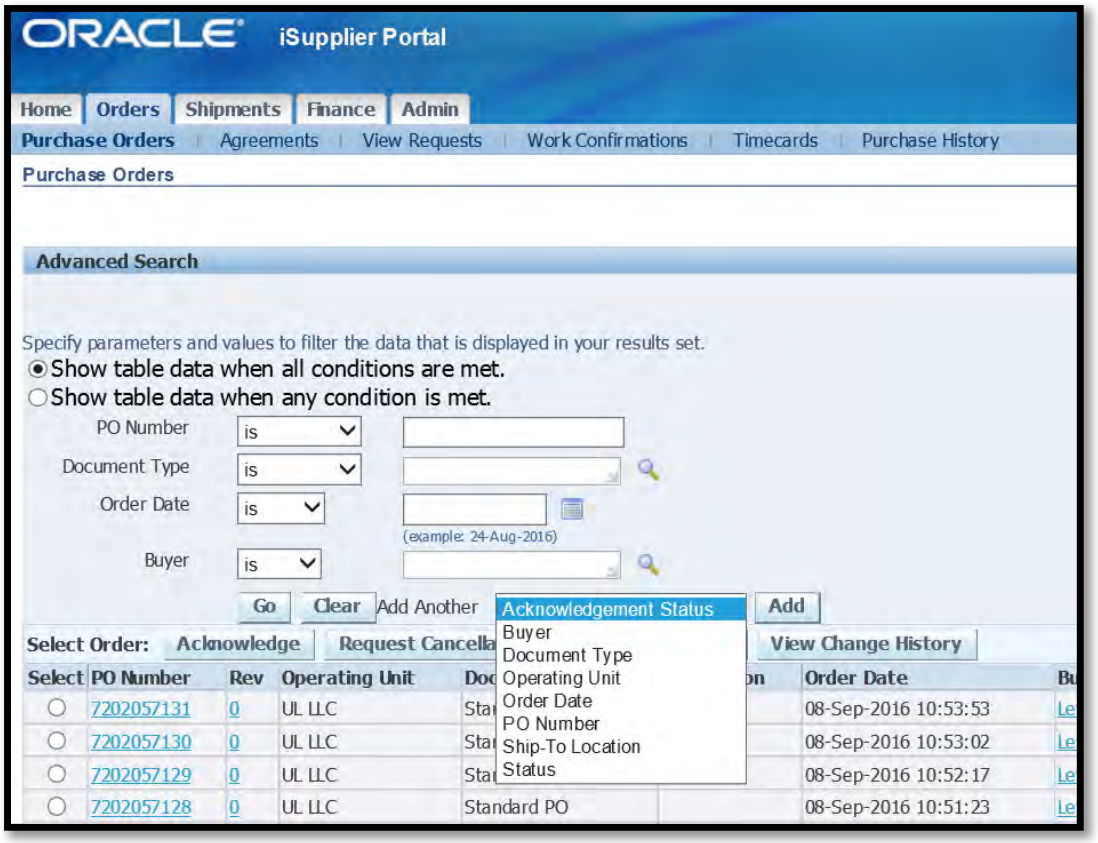
The View Purchase Orders page display the most recent 25 purchase orders (use the Previous and Next links to view additional purchase orders).



1. From the View menu, choose which purchase orders to display:
    a. All Purchase Orders
    b. Purchase Orders to Acknowledge
    c. Purchase Orders Pending Change
    d. Click Go



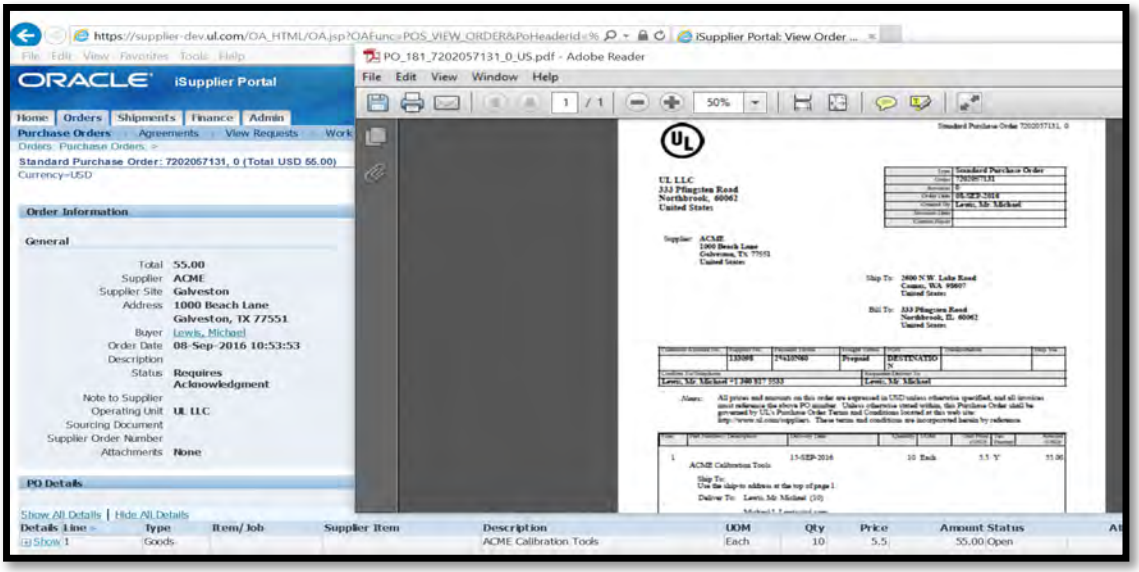
2. Advanced Search
    a. Click the Advanced Search button to perform a more exact search for a PO.



Printing Purchase Orders

From the details of a purchase order you can request a printable view:

1. Click on the PO number you would like to print from the Purchase Orders screen. You will also see the details of the PO on the screen. (shown in background of image below)
2. Select Actions: View PDF and click go to return a PDF file that can be printed



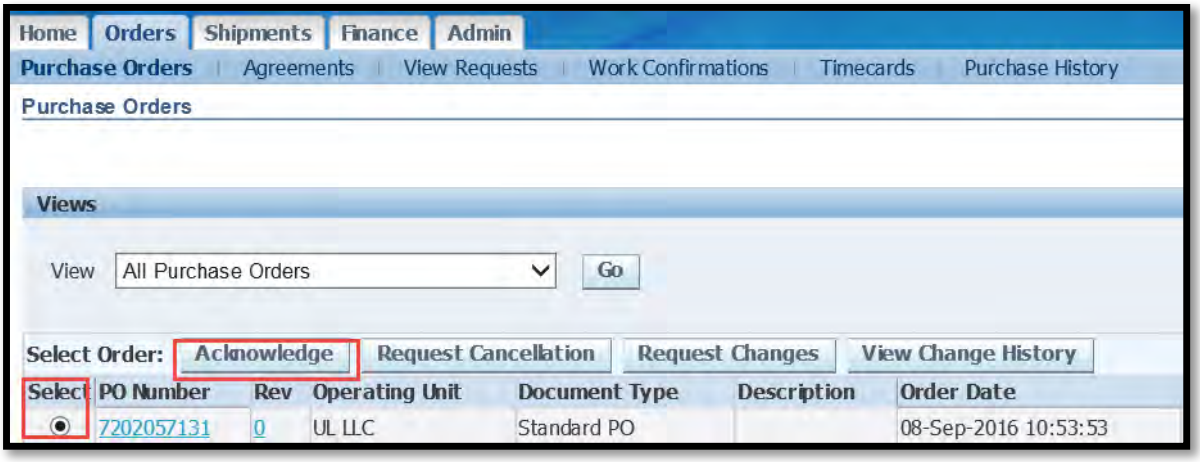
Acknowledge Purchase Orders

When creating a purchase order, buying companies can request acknowledgment of the purchase order. If so, you will receive a notification requiring your response. The purchase order may include a date by which you need to acknowledge or sign it.

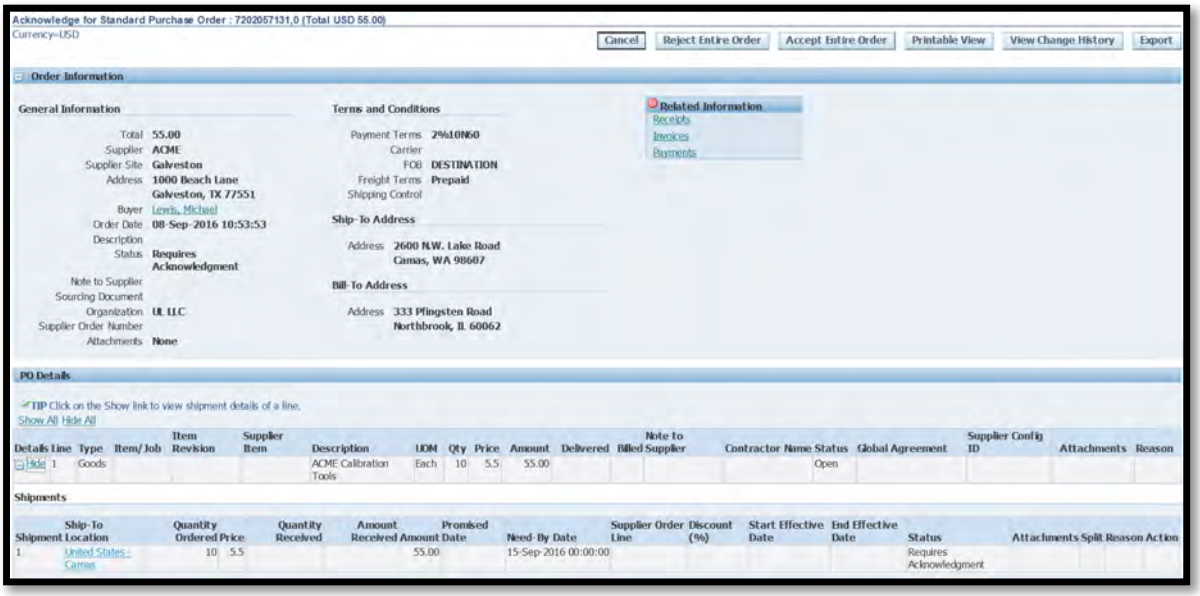
You can either acknowledge the order online, or accept or reject the order using the notification. The notification does not allow shipment level acknowledgment, which must be entered online. When you respond, the purchase order is automatically updated, and a notice is sent to the buyer.

To acknowledge purchase orders:

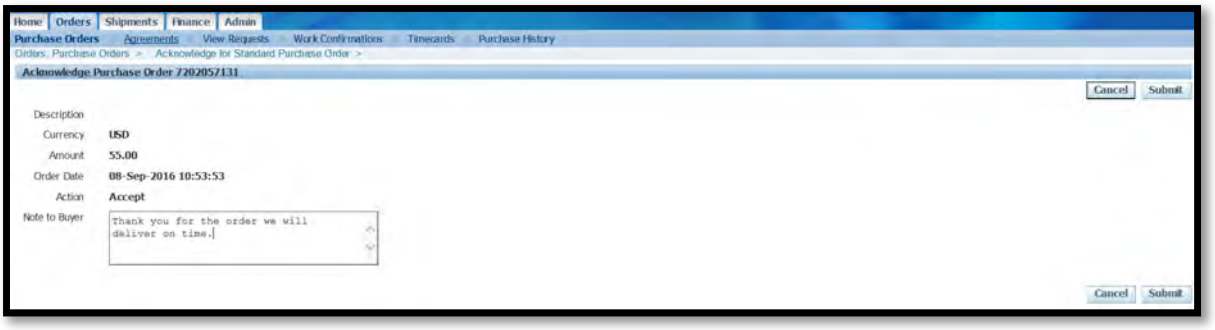
1. Access the purchase order you wish to acknowledge by clicking on the PO number link or by selecting the line and clicking the Acknowledge button



2. On the **Acknowledge** page, you can accept or reject an entire order, or you can accept or reject individual shipment. To accept/reject an individual line's shipment or pay item, click Show for the line.



3. After clicking the accept button, you can enter a note. Click submit send.



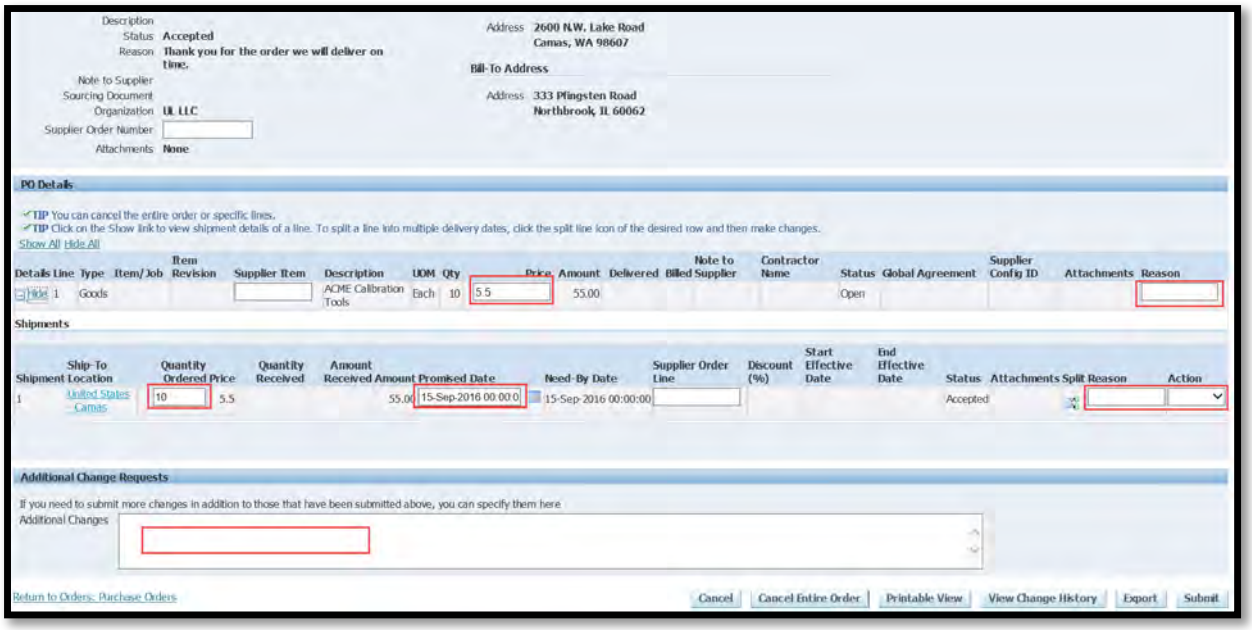
4. The buyer will receive a notification that the order has been accepted

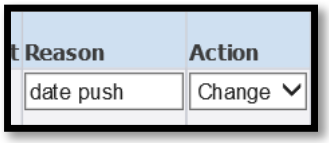
Requesting Changes

General Changes

To submit a single change request:

1. Click the Orders tab, and then click Purchase Orders in the task bar below the tabs.
2. On the View Purchase Orders page, search for and select the purchase order for which you wish to request changes.
3. Select the purchase order and Click Request Changes.
4. On the **Request Changes** page, enter your changes.
5. You may request changes to the following values :
    a. Price/Price Breaks on Blanket Agreements
    b. Supplier Item
    c. Supplier Order Reference Number
6. In the reason text box, enter a reason for your change request.
7. ***If you wish to request changes to shipments. You can request changes to***
    a. Price/Price Breaks on Blanket Agreements
    b. Quantity Ordered
    c. Promised Date
    d. Supplier Order Line
    e. Note that you can also enter change request information in the Additional
8. Change Request text box.
9. Enter the changed values as appropriate.
10. Enter a reason for your change.
11. Select the appropriate action.
12. Click Submit.





Note: you can also change multiple orders simultaneously by clicking on the Multiple PO Change button

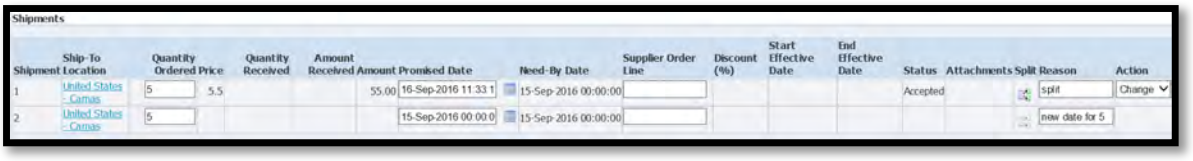
1. Click on the Multiple PO Change button
2. Search for PO's
3. Select PO's to change
4. Enter default information and apply to the orders or update each line individually

Splitting Shipments

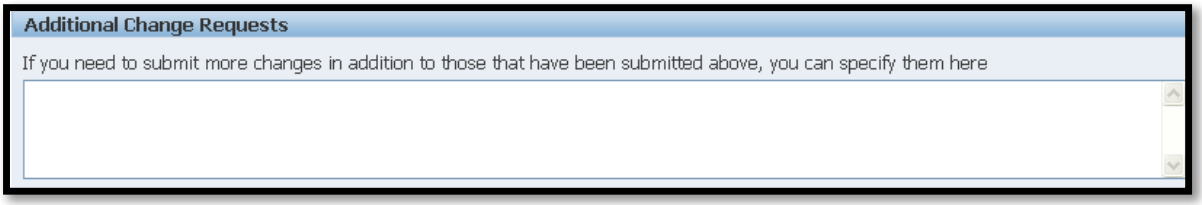
1. After selecting your Purchase Order, click the show lines icon

and then click the split icon

2. You will then be able to update the shipment information such as:
    a. Promised date
    b. Supplier Order Line
    c. Reason
    d. Action.



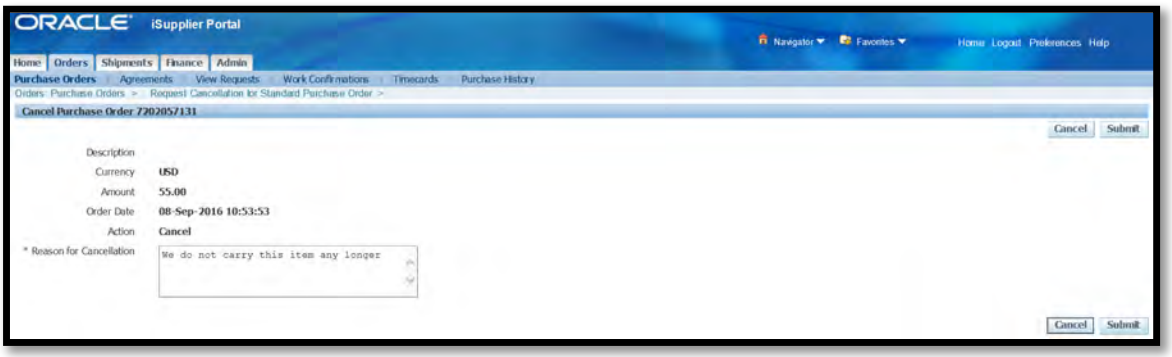
3. You can also enter additional details to inform the buyer of other requested changes.



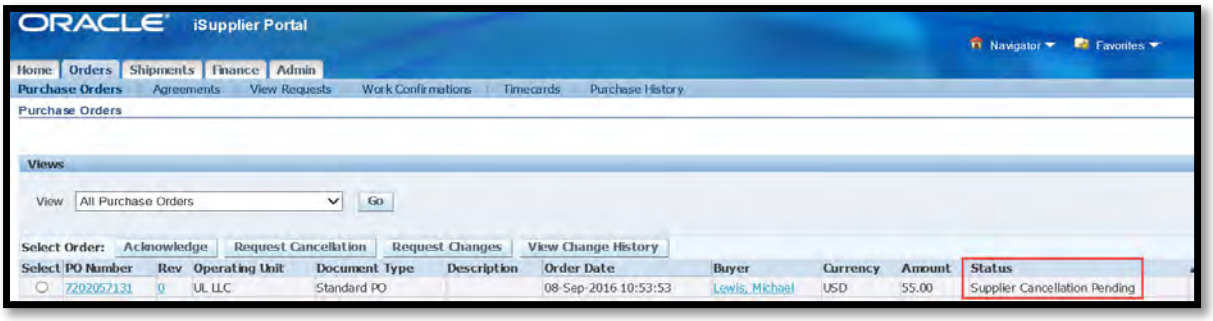
Cancellations

1. After selecting your Purchase Order to cancel, click the request cancellation button
2. Click the Cancel Entire Order Button

3. Enter a Reason



4. Click Submit
5. The order will go into a Supplier Cancellation Pending status until it is accepted by the buyer.

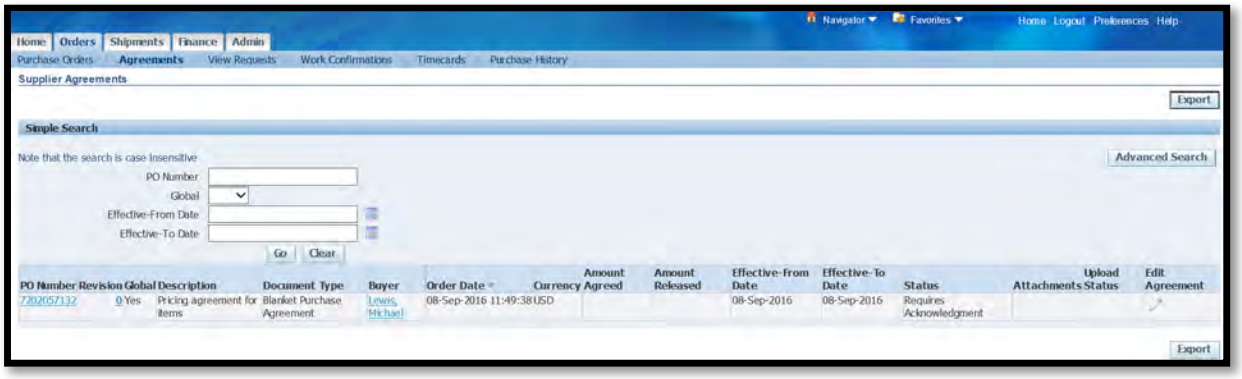


Agreements

Supplier agreements are purchase agreements(Pricing Arrangements) you have made with the buying company. On the Supplier Agreements page, you can review the details of those agreements, and the corresponding releases (orders) that have been created for a particular agreement.

View

To view agreements, click the Orders tab, and then Agreements in the task bar directly below the tabs. Use the search criteria to get a summarized list of agreements. For each agreement, you can select to view the releases created to date for that agreement. You can export details from any page.



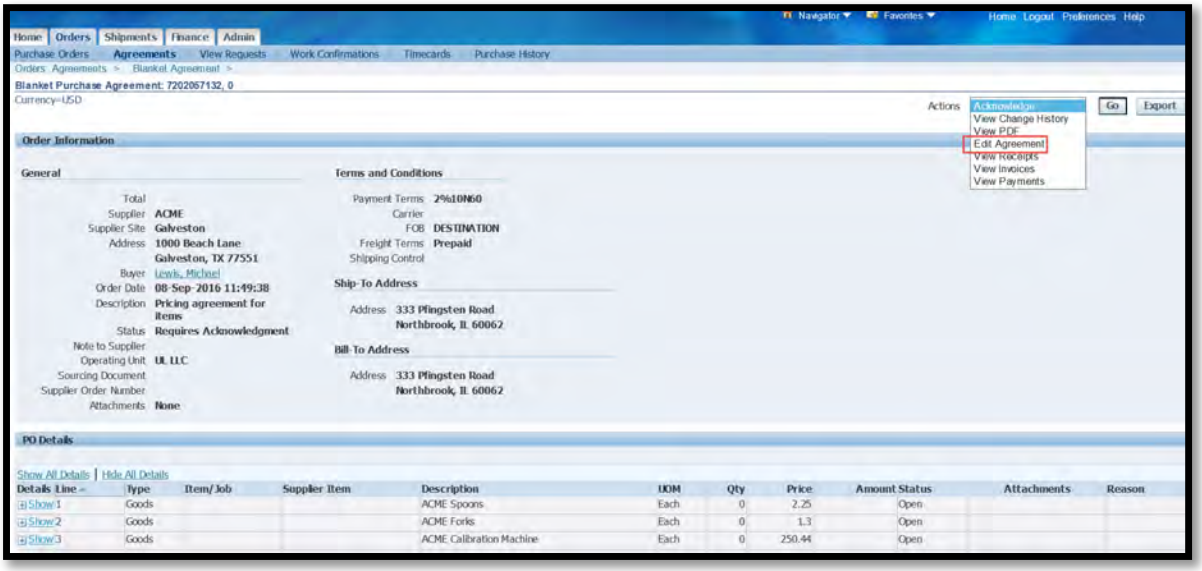
Request Changes

From time to time you may need to update your catalog content at the buyer's site. You can do this by editing the blanket agreement you have with your buyer providing the buyer has enabled the agreement to allow you to do so

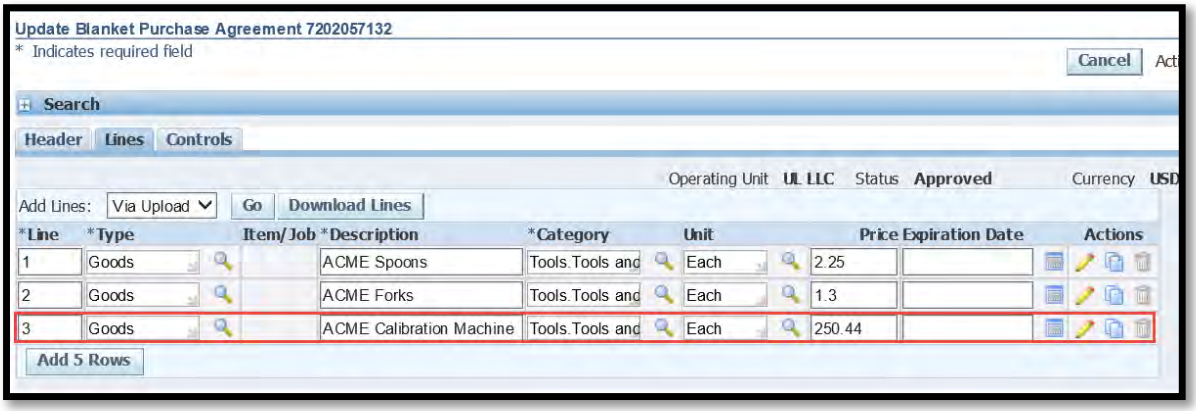
To edit catalog information:

1. Access the blanket purchase agreement.
2. On the **Blanket Purchase Agreement** page, click the purchase number link in the header.
3. This will take you to a screen that provides a view of any/all of the releases that have occurred against this blanket order

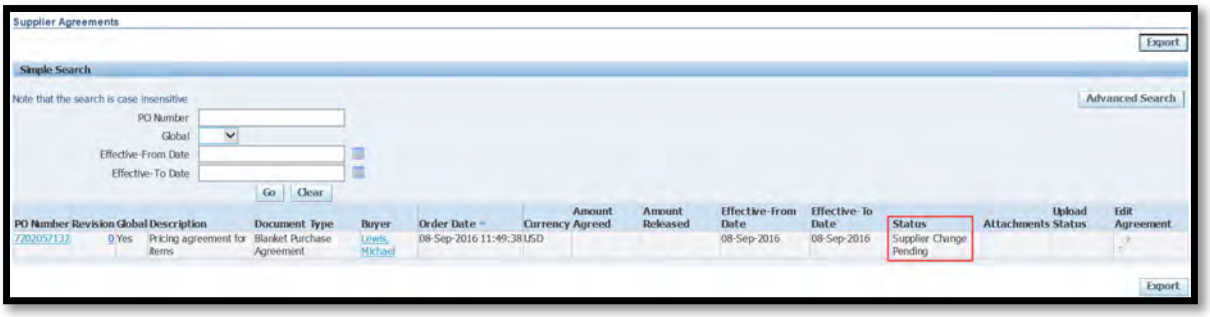
4. Click the PO Number (Blanket Agreement Number) at the top of the page to drill down to the agreement
5. On the **View Order Details** page, select Edit Agreement from the Actions menu.



6. Click go and the edit screen will appear



7. Click on the Pencil to make line item detail changes if needed. Example Update price or add a line(add 5 rows)
8. Maker changes like adding an item and then click apply
9. Click Submit
10. The Agreement will be sent to the buyer for review and approval



11. Once the agreement is approved, the buyer's catalog information will be updated.

Time Cards

To be paid for services rendered, contractors can record hours worked using timecards. You may access these time cards if the Timecards task appears under the Orders Tab. You will be able to view timecard information and check the amount of time confirmed by the hiring manager.

View

To view timecards, click the Orders tab, and then click Timecards in the task bar directly below the tabs. Use the search criteria to get a summarized list of timecards. Click View Timecard to get more details about the timecard. You can export details from any page.

Purchase History

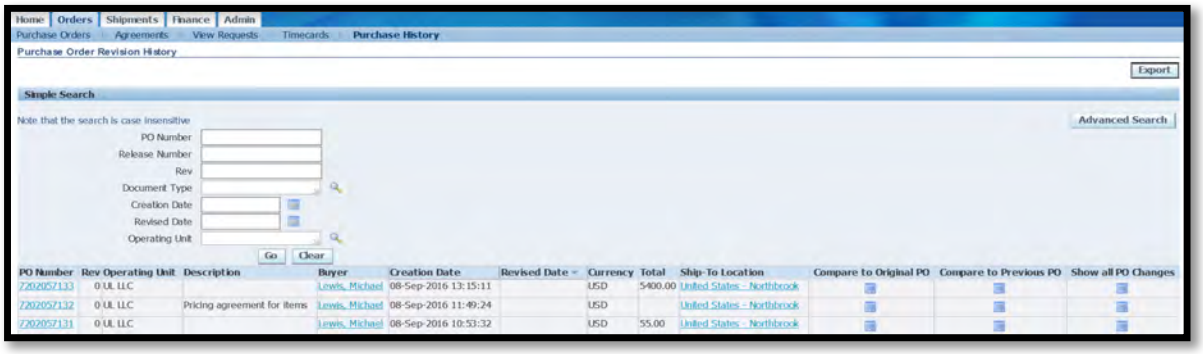
The PO Revision History page enables you to search for details on the revision history of a purchase order.

Using the search criteria, you can get a summarized list of purchase orders that have been revised. You may choose to compare each revised PO to the original PO, the previous PO. You can also view all changes made to the PO.

View

To view PO Revision History:

1. From the iSupplier Portal Home page, click the Orders tab, then click the Purchase History subtab.
2. Enter search criteria to identify the purchase order(s) you wish to inspect. Click Go.



SHIPMENTS

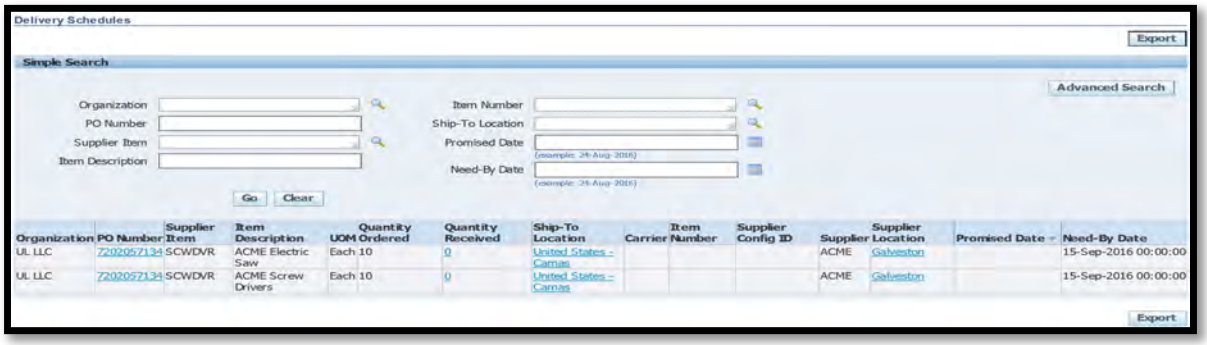
Oracle iSupplier Portal enables you to view your existing shipments. Using your shipments you can create or cancel advance shipment notices. The system enables you to view other shipment information such as delivery schedules.

Using shipping features, you can alert the buyer to upcoming shipments and expedite receipts and payments for the buying company.

Shipping information details all of your shipping transactions on Oracle iSupplier Portal. You can create or cancel shipment notices as well as view shipment delivery schedules and overdue shipment receipts

Delivery Schedules

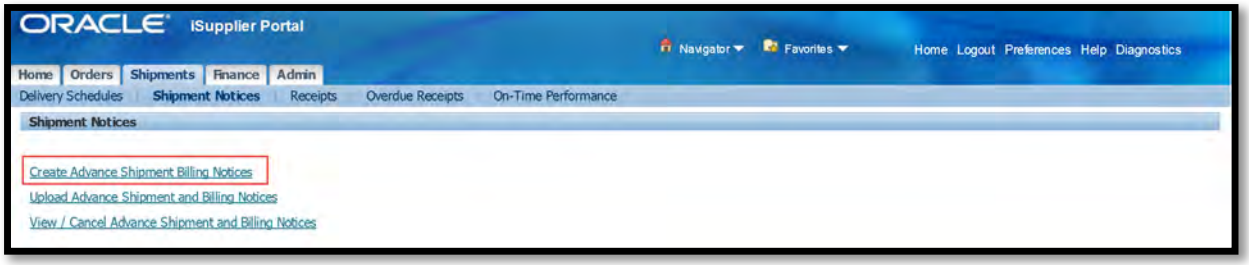
You can use the Delivery Schedules Results page to quickly determine deliveries that need to be scheduled and deliveries that are past due. Click the purchase order number, receipt quantity, and ship-to location links to view further detail.



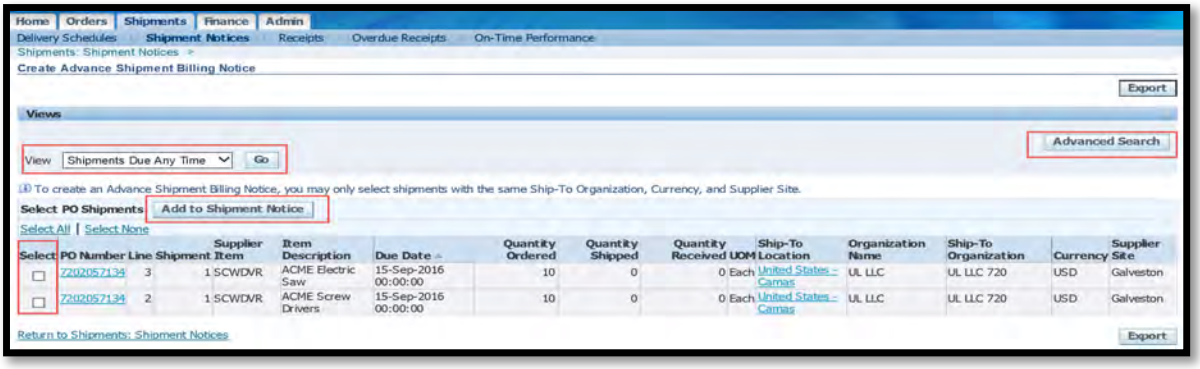
Shipment Notices

When you enter an Advance Shipment Billing Notice (ASBN), you alert the buying company of upcoming shipment deliveries. To create an ASBN, select the purchase order shipments being shipped and provide the appropriate shipment and billing details.

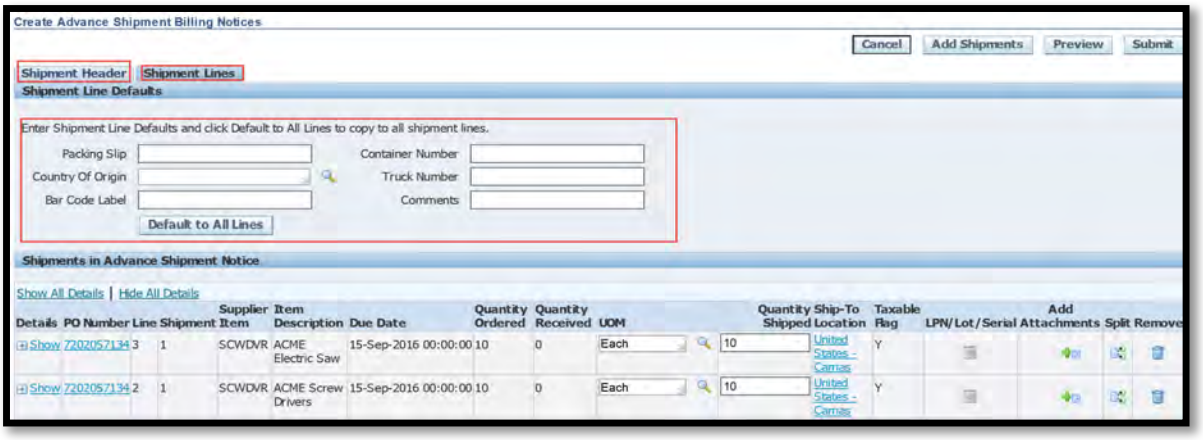
Create Advance Shipment Billing Notices



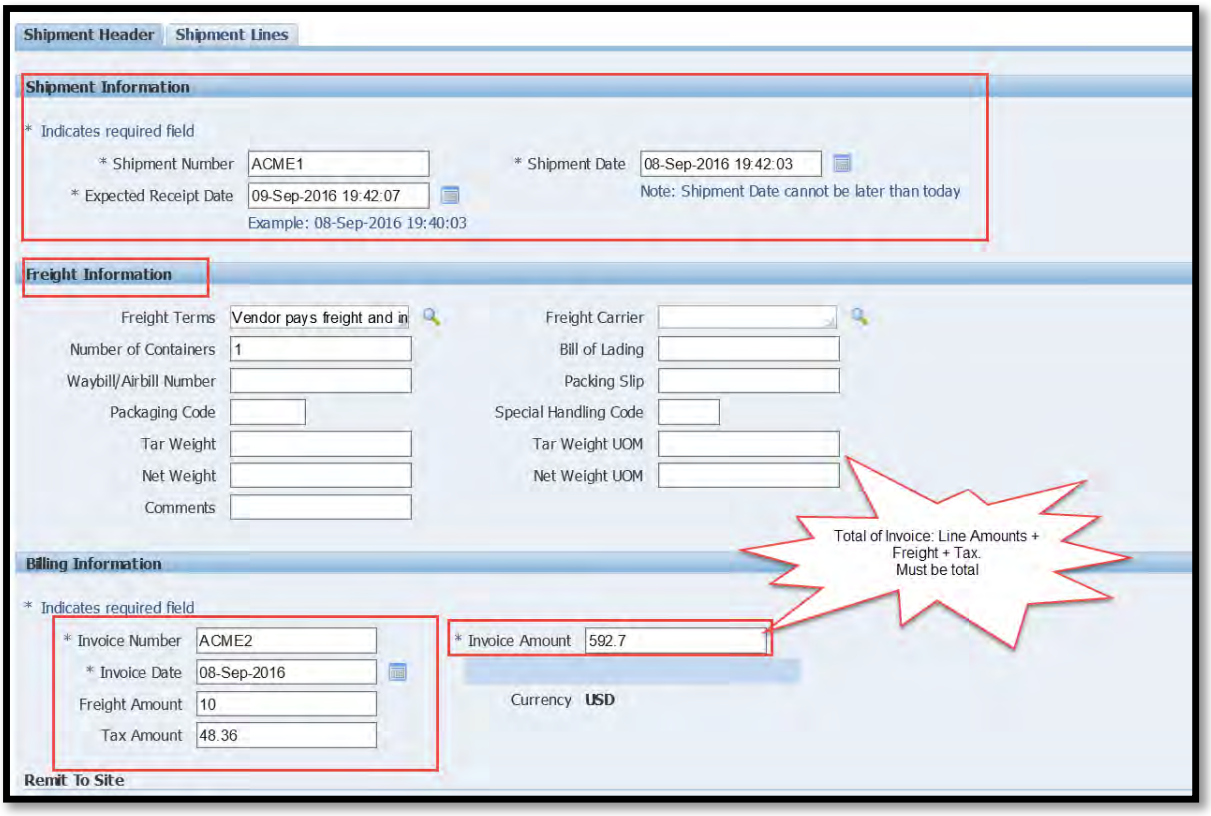
1. Click the Create Advance Shipment Billing Notices Link
2. You will be taken to a search page where you can search for:
    a. Shipments due this week
    b. Shipments due anytime
    c. Or use an advanced search to find detailed lines
3. Select the shipments and click the Add to Shipment Notice button



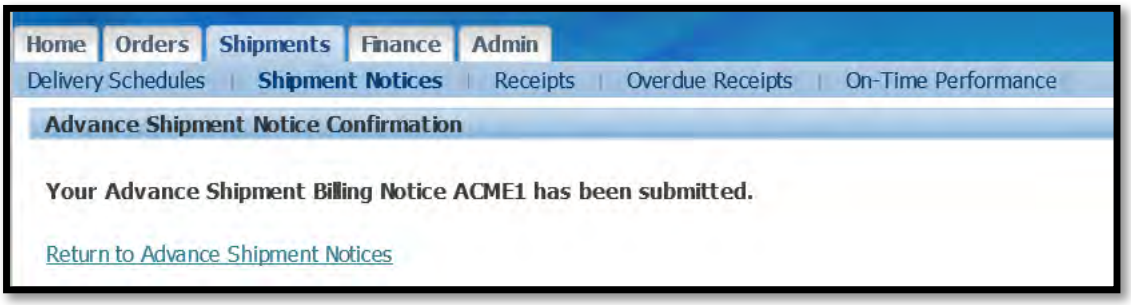
4. Enter the line level information such as packing slip and comments
5. Enter the quantity that shipped
6. Click on the Shipment Header tab



7. Enter the Shipment Information that applies to the header:
    a. Shipment Number
    b. Shipment Date
    c. Expected Receipt Date
8. Freight Information:
    a. Freight Terms
    b. Number of containers
    c. Bill of Lading
    d. Packing Slip
    e. Etc.
9. Enter the Billing Information
    a. Invoice Number – must be unique
    b. Invoice Amount – total of lines, freight, and tax.
    c. Invoice Date
    d. Freight Amount
    e. Tax Amount



10. Click Submit to enter shipment and billing



Canceling Advance Shipment Billing Notices

When you cancel an ASBN, the system sends a notification to the buyer. You can always reenter an ASBN for the same purchase order shipments at a later time. When you cancel an ASBN, both the shipment notice and corresponding invoice that was issued in the buyer's payable system are canceled.

To cancel a submitted advance shipment notice or advance shipment billing notice:

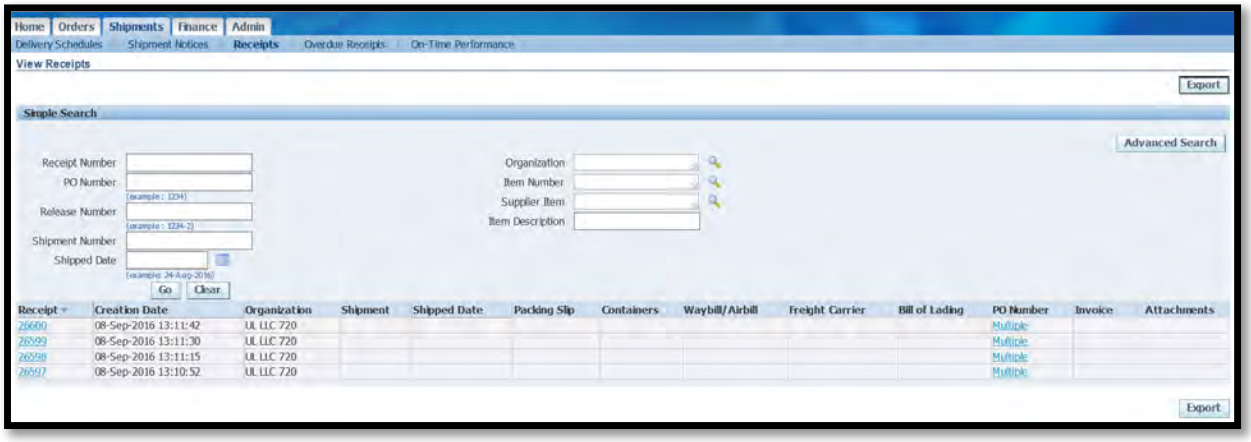
1. Click the Shipments tab, and then click Shipment Notices in the task bar directly below the tabs.
2. On the Shipment Notices page, click View/Cancel Advance Shipment Notices.
3. On the View/Cancel Advance Shipment Notices page, search for and select the advance shipment notice you would like to cancel.

Note: You can use the advanced search feature to narrow your search.

Click Cancel Shipment Notice. A notification of your cancellation is sent to the buyer.

Note: Canceling a shipment notice cannot be undone. You can cancel an ASBN if none of the lines has been received and the invoice has not been paid by the buying company.

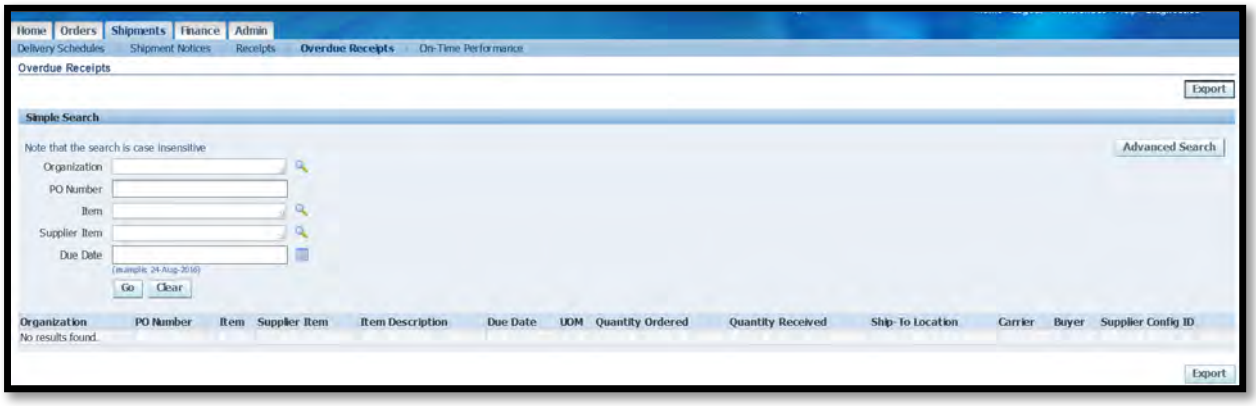
Receipts



Overdue Receipts

The Overdue Receipts Results page enables you to view the details of past due purchase order shipments. Click the PO number, Ship-To Location, and Buyer to view further detail.

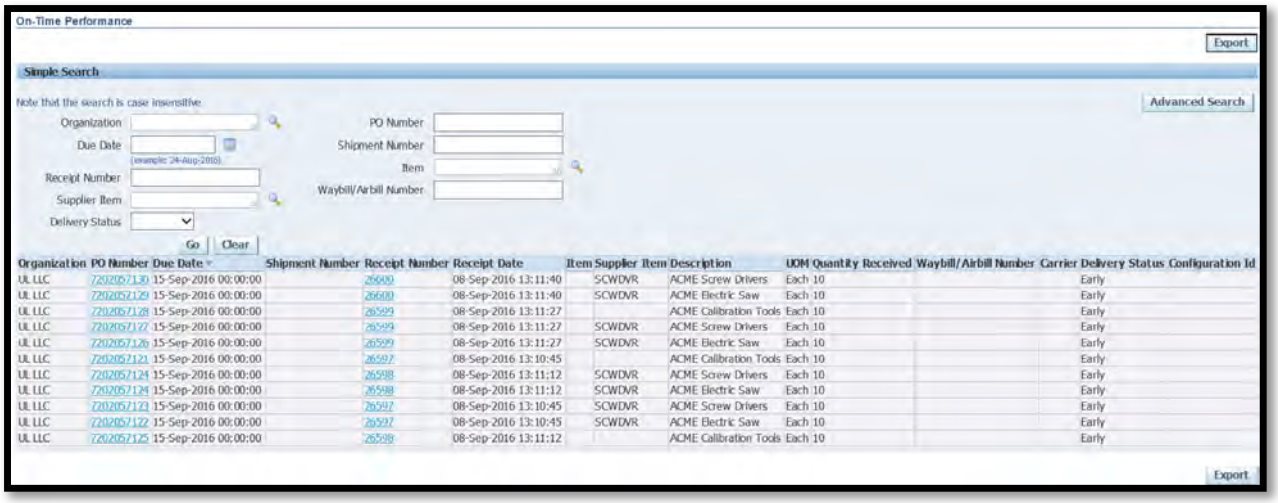
1. Click on Overdue Receipts link
2. Perform simple or advanced search



On-time Performance

The On-Time Performance page provides the delivery status of shipments you made against purchase orders. You can view your performance for timeliness of deliveries. Click the PO Number and Receipt Number to view further details.

1. Click on On-Time Performance link
2. Perform simple or advanced search



INVOICES AND PAYMENTS

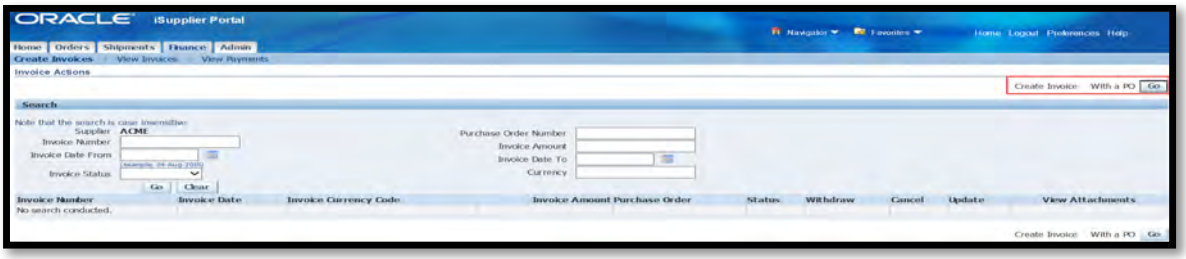
You can access invoice and payment information as well as review invoice status online using Oracle iSupplier Portal. If the buying company uses Oracle Payables, you can also submit invoices online.

Creating Invoices

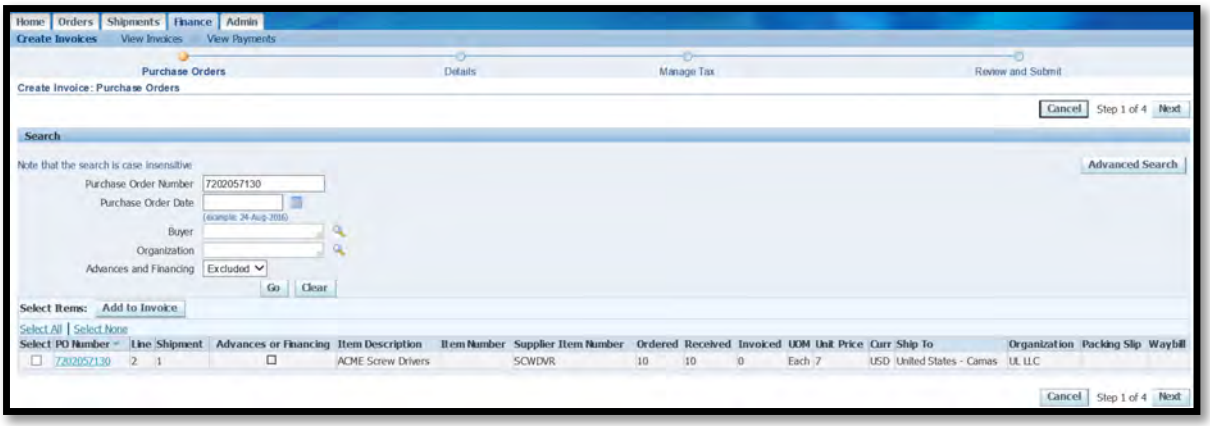
You can submit an invoice online to the buying company based on the purchase order lines you have fulfilled. You need to only identify those items shipped and enter a quantity. You can invoice against open, approved, standard or blanket purchase orders that are not fully billed. You can enter a credit memo against a fully billed purchase order (use negative quantity amounts to enter a credit memo), as well as invoice against multiple purchase orders.

To submit an invoice with a matching purchase order:

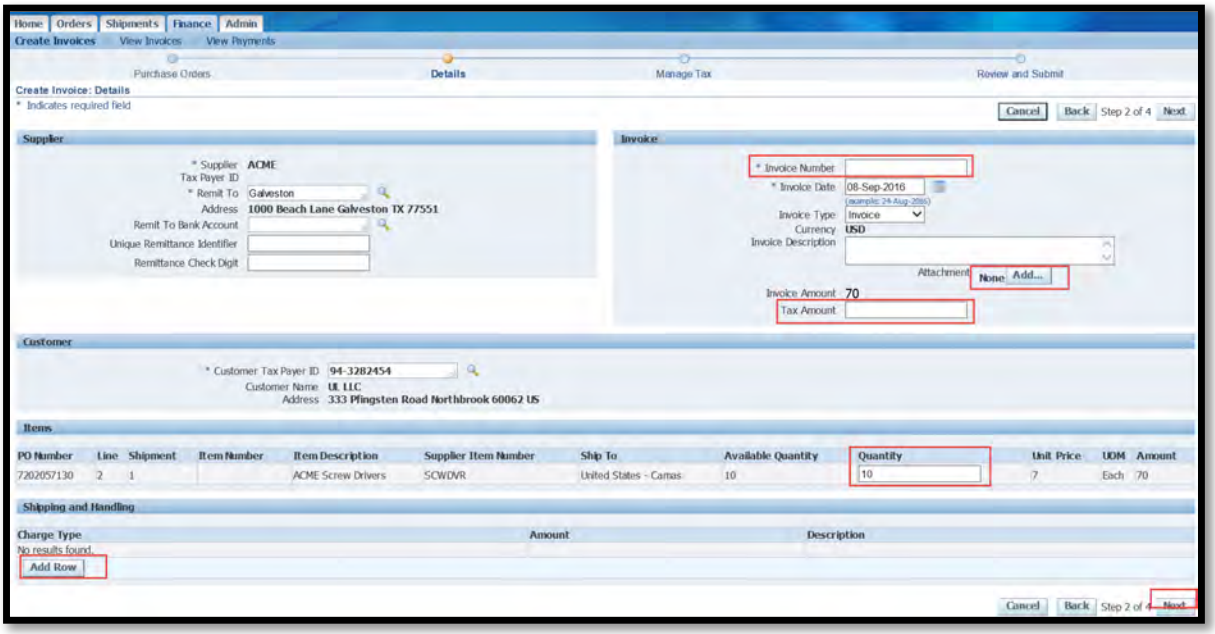
1. Click the Finance tab, and then click Create Invoices in the task bar directly below the tabs.
2. On the Invoice Actions page, select Create invoice With a PO and click Go.
3. On the Create Invoice: Purchase Orders page, enter search criteria to identify the purchase order, and click Go.



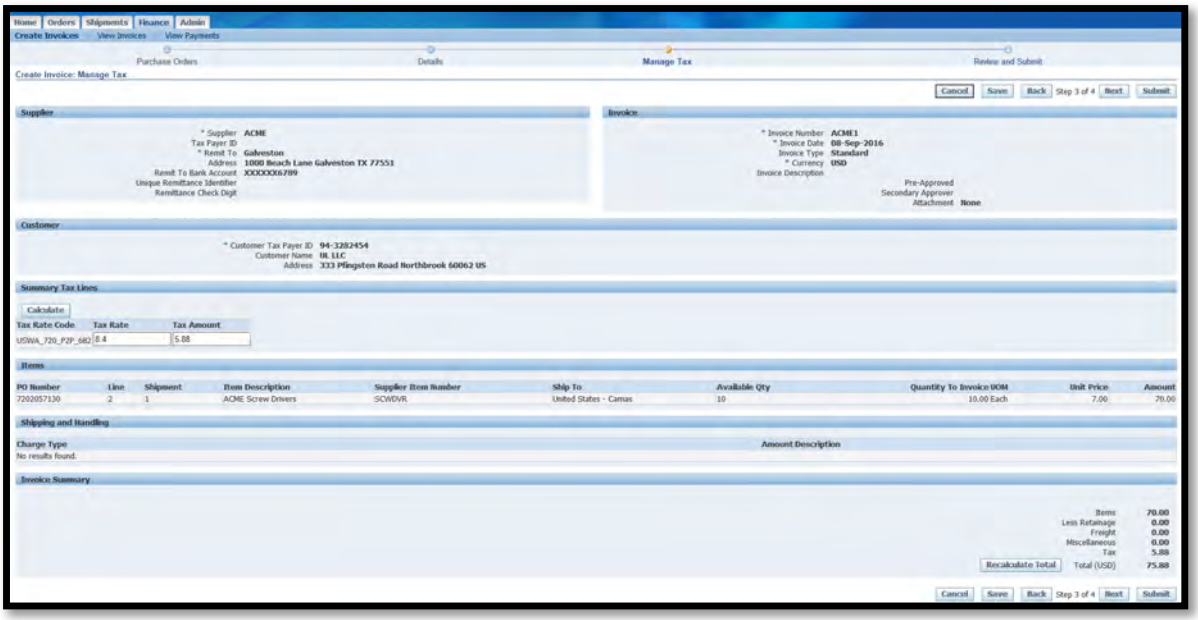
4. Select items of the PO to be invoiced and click Add to Invoice. Add as many items as you need (items on your invoice display at the bottom of the page). If you mistakenly add an item to the invoice, you can select it and click Remove from invoice.



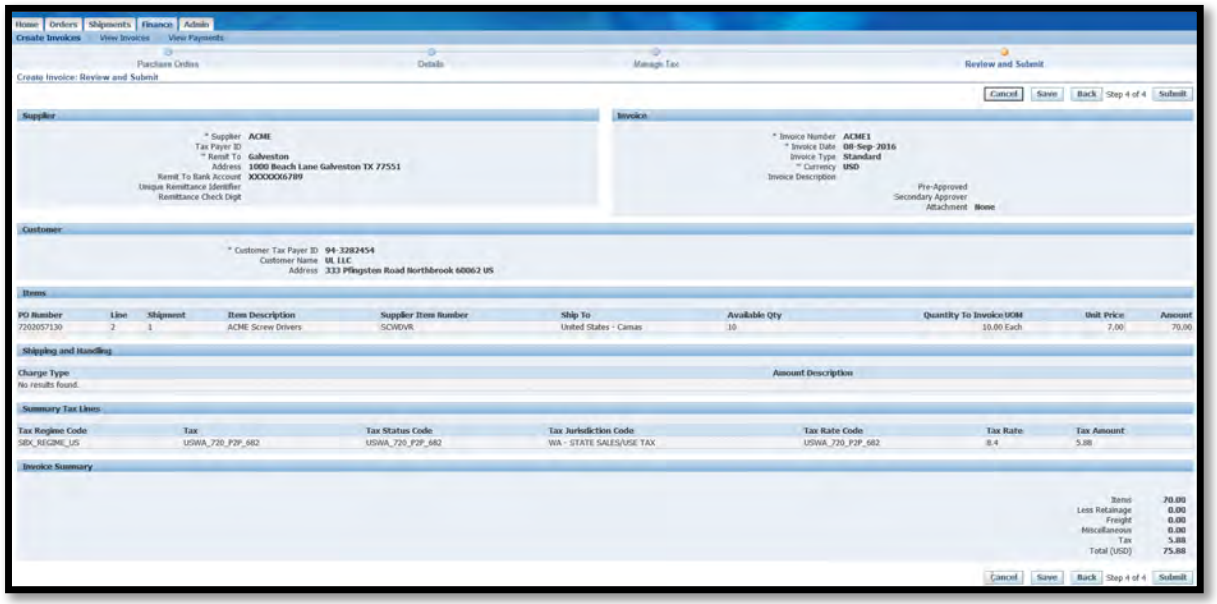
5. When finished adding items, click Next.
6. On the Create Invoice: Details page, enter an invoice number and remit to address (if it does not default). Enter a tax amount for this transaction. You can also update the quantity. Enter and any additional information such as attachments, and then click Next.



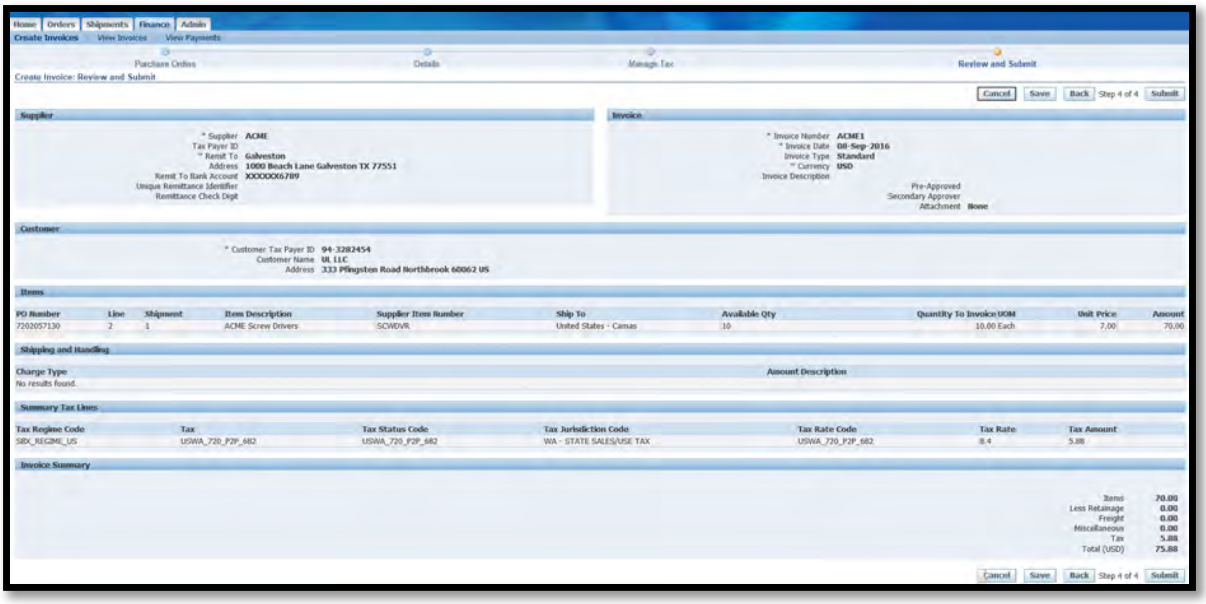
7. On the Create Invoice: Manage Tax page, you can view the tax information generated, as it is based off of the tax amount you entered on the invoice header.



8. When finished, click Next.
9. On the Create Invoice: Review and Submit page, review your invoice and click Submit. You also have the option to return to this invoice later by clicking Save for Later.



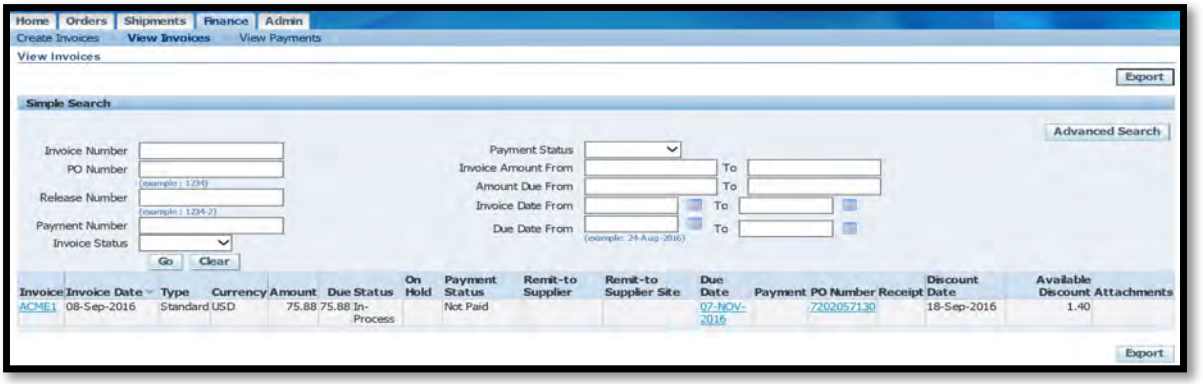
10. A Confirmation page is generated informing you of successful invoice creation.



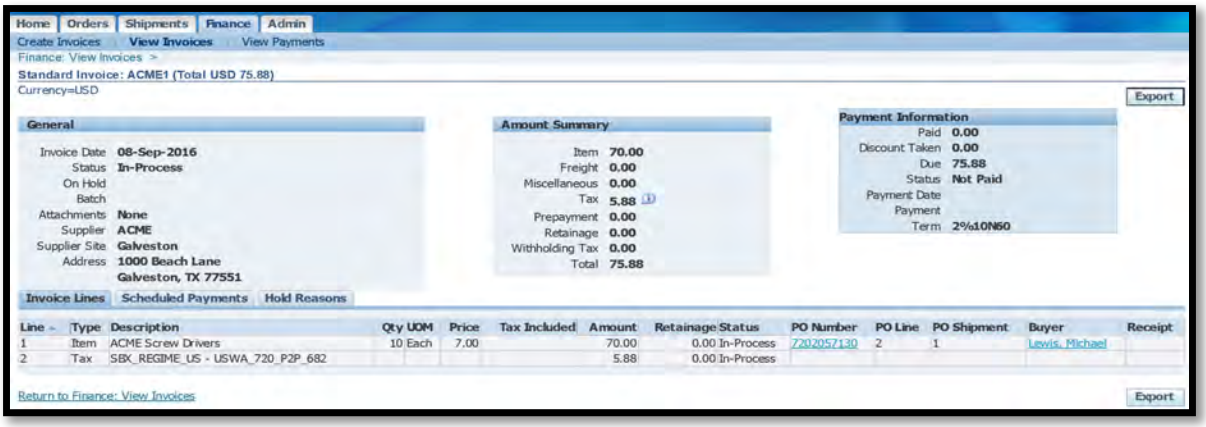
Viewing Invoices

To view invoice information:

1. On the iSupplier Portal Home page, click the Finance tab, then click the View Invoices subtab.
2. On the View Invoices page, enter search values into one or more of the search fields, and click Go. Or use the Advanced Search option.



3. When the search results display, click the invoice number link to view details of the invoice. (You can also view any associated purchase order(s), payments, or scheduled payments by clicking their links).
4. On the Invoice Details page, you can see the header level information.

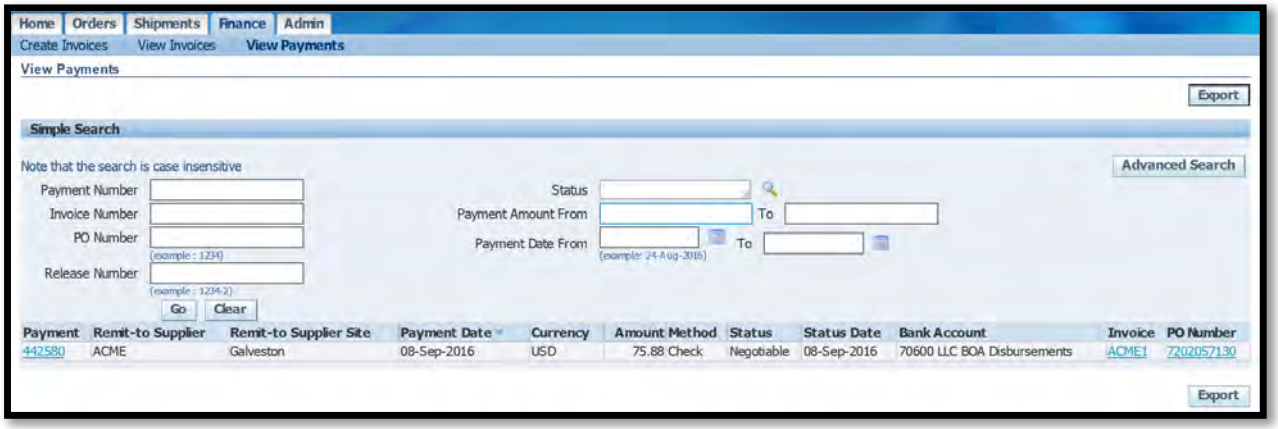


5. To view invoice line information, click the Invoice Lines tab. You can also view any scheduled payments and any hold information.

Viewing Payments

To view payment information:

1. On the iSupplier Portal Home page, click the Finance tab, then click the View Payments subtab.
2. On the View Payments page, enter search values into one or more of the search fields, and click Go. Or use the Advanced Search option.
3. When the search results display, click the payment number link to view details of the payment. (You can also view any associated purchase order(s), or invoices by clicking their links).
4. On the Payments details page, you can see the payment details including the invoices addressed by the payment.



ADMINISTRATOR (ADMIN) TAB

After logging into Oracle and choosing the iSupplier responsibility, the first screen you will see is the iSupplier home page. The Home Page provides top level access to all iSupplier menus, submenus, links and web forms. The users can navigate by selecting the menu tabs or by clicking on the subsequent purchasing process nodes.

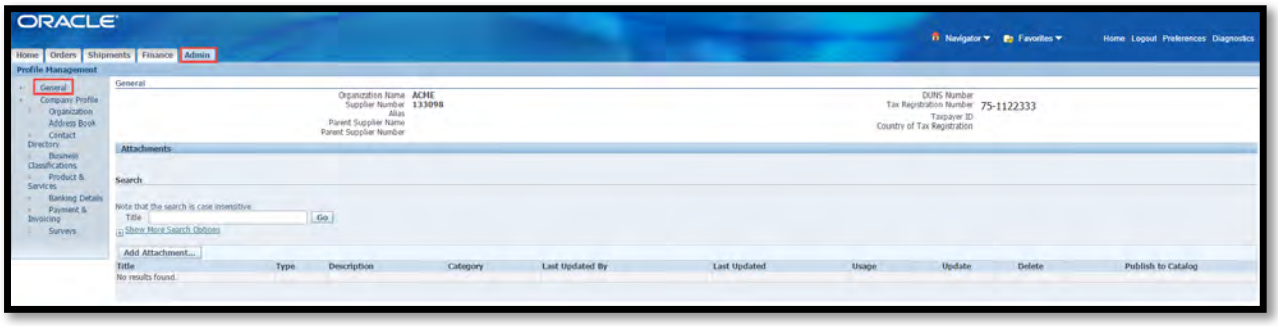
Note: If you have more than one responsibility you will be taken an initial page to select your responsibility

Oracle Responsibility: UL iSupplier Portal Admin or UL iSupplier Portal User

UL iSupplier Portal Admin has access to the Admin tab.

UL iSupplier Portal User does not have access to the Admin tab.

Navigate: iSupplier Homepage → Click on Admin tab



GENERAL

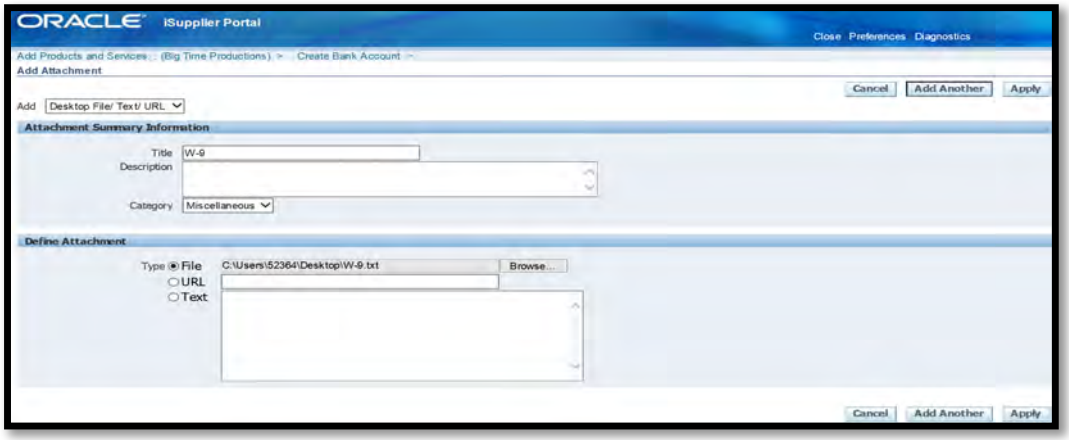
After clicking on the Admin tab, you will be taken to the General information section of you administrative functions.

You will see some information that you cannot update from this page such as your organization name, supplier number and tax registration information.

You can also manage your attachments from this page.

Attachments

1. Click Add Attachments – you can add files, text or even a link to a URL
    a. Enter a title
    b. Change the category to Miscellaneous
    c. Click File and browse your local machine for W-9 information



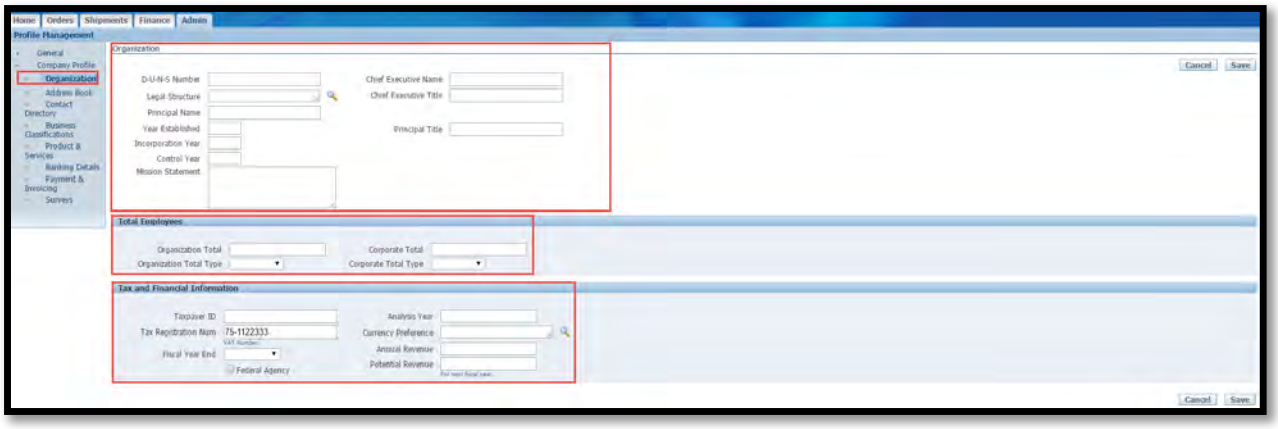
    d. Click Apply
    e. Receive Confirmation
    f.

ORGANIZATION

Click on the Organization link to update information about your business. This includes updating:

- Organization information
- Total Employee information
- Tax and Financial information

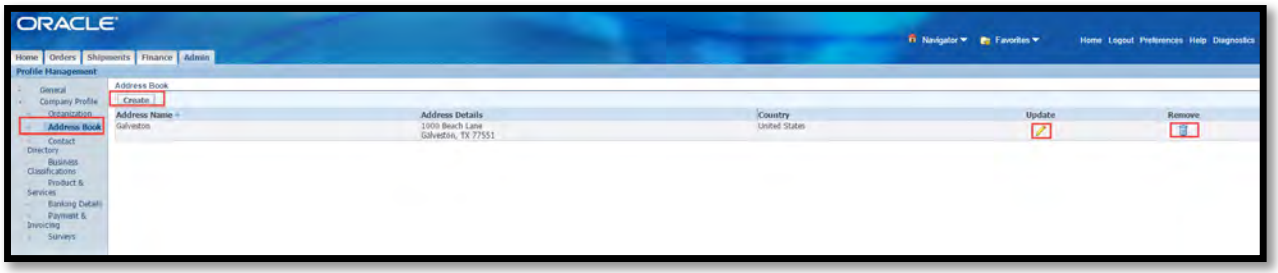
Updating this information does not require approval from your UL Supplier contact.



Make changes and save your work.

ADDRESS BOOK

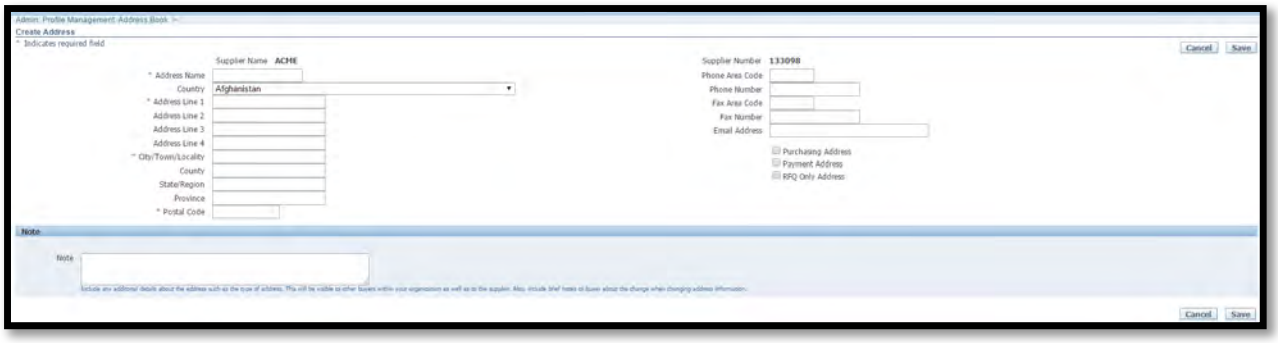
Click on the Address Book link to manage the various addresses that are associated with your company. Please note that any changes to this section will require approval by a UL resource.



Create Address

Click on Create button to add a new address

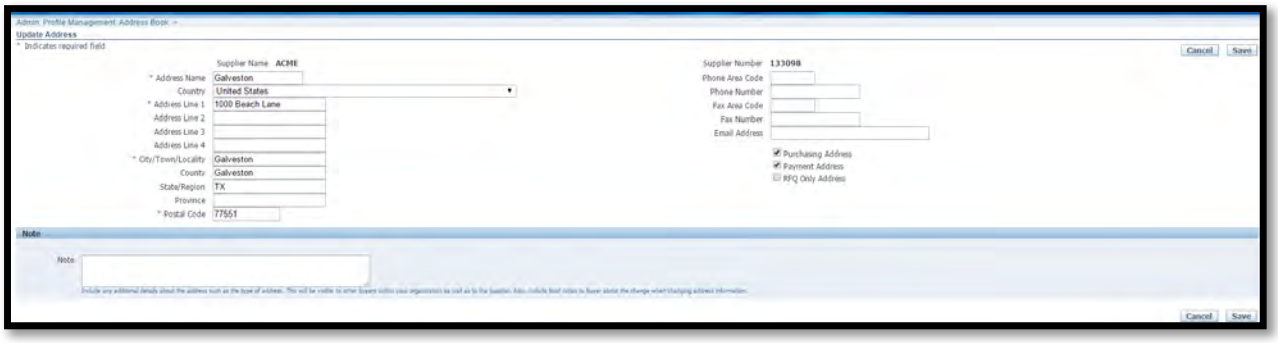
Enter address information and Save



Update Existing Address

Click on the update pencil icon to alter an existing address information.

Make changes and click save.



Delete Existing Address

Click the trashcan icon to delete an existing address.

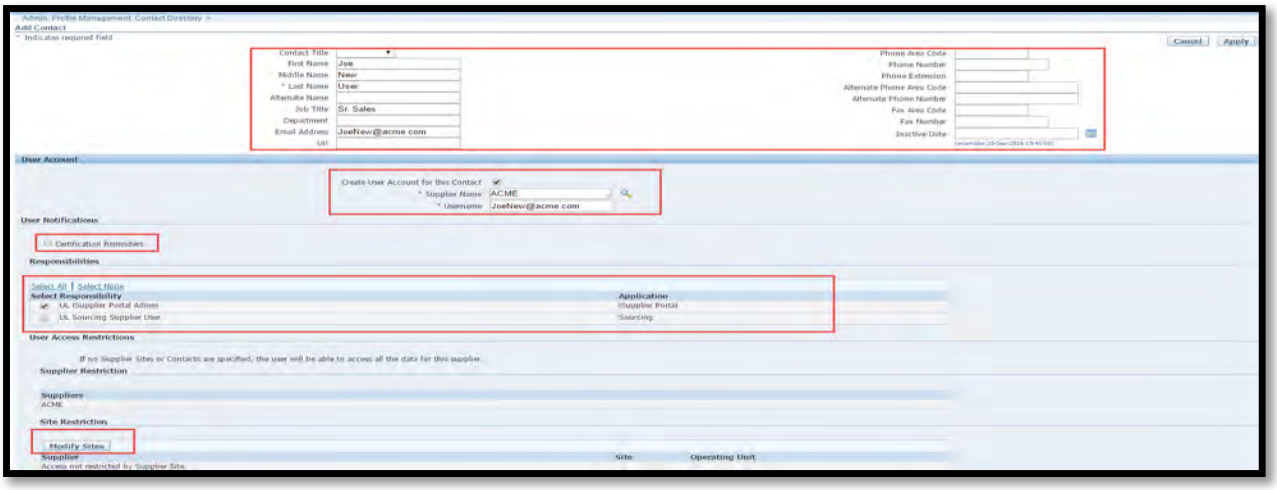
CONTACT DIRECTORY

The Contact Directory allows you to maintain the contacts for your company that are authorized to access the UL systems and that UL should be in contact with for various transactions. If the user has a check mark under the User Account column, then they have the ability to log into UL's Oracle system. Any changes and/or updates to contacts and users will require UL approval.

Note these contacts should be the key sales and accounts receivables people of your organization. By default all iSupplier users will receive notifications on new and revised purchase orders.

Create Contact

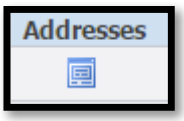
1. Click the Create button



2. Enter the contact information. First name, last name, etc.
3. If you would like to provide this user with access to the UL iSupplier Portal, select the Create User Account for this Contact check box.
    a. Select your Supplier Name (only one in list)
    b. The user name will be the email address from above. Please leave as such.
4. If this contact should be receiving certification reminders select that choice.
5. You will be able to select the type of access the new contact has when they access UL systems.
6. If for some reason you would like to restrict this contact's access to a particular business site, you can opt to modify sites and restrict them to a particular site (s).
7. Click Apply when finished.
    a. The new user will be sent an email with a user name and password.
8. The user will need to

Contact Addresses

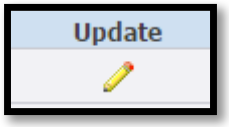
If you would like a particular contact to be the primary/default contact for an address site, then click on the Addresses icon to create the association.

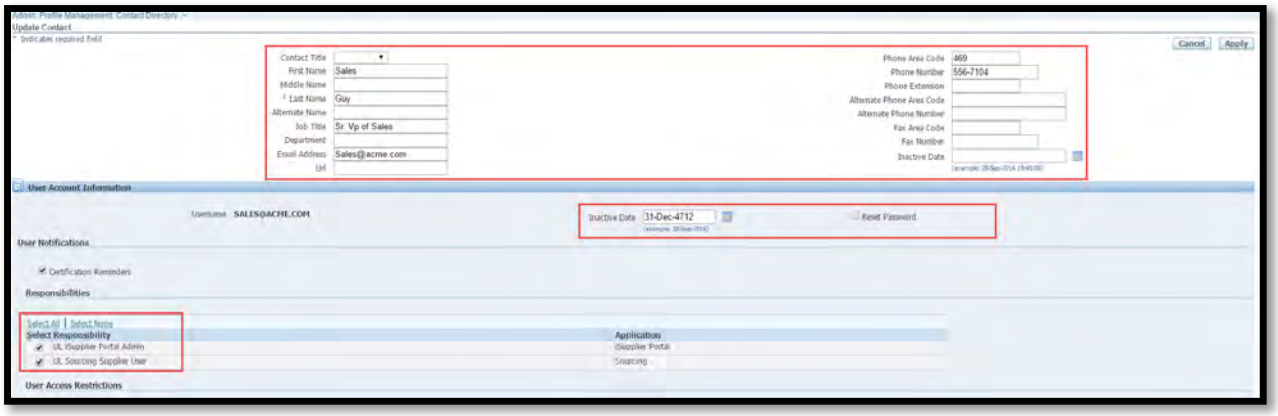


1. Click Add Another Row to add another address and save.

Update Contact

To update an existing contact click the pencil icon





Make any updates that are required to the user information.

User Password Reset

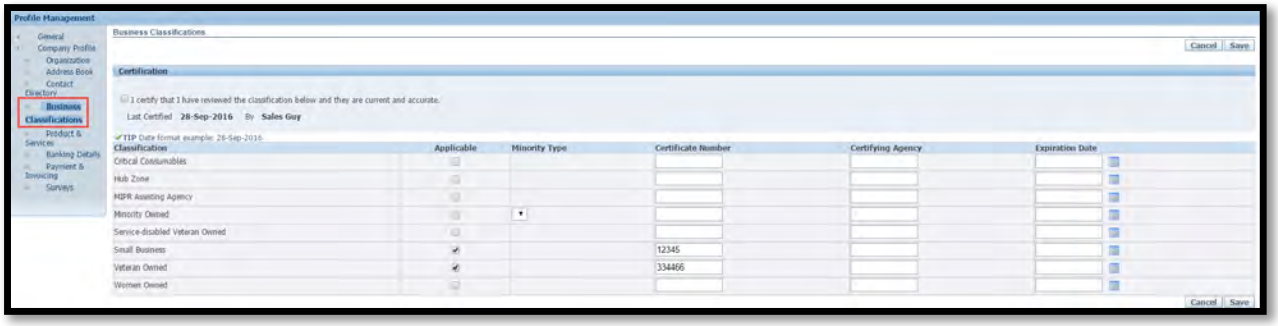
Select the Reset Password check box and apply to generate a new password.

Inactivate Existing User

Enter a current inactive date for the User Account and above in the Update contact section.

BUSINESS CLASSIFICATIONS

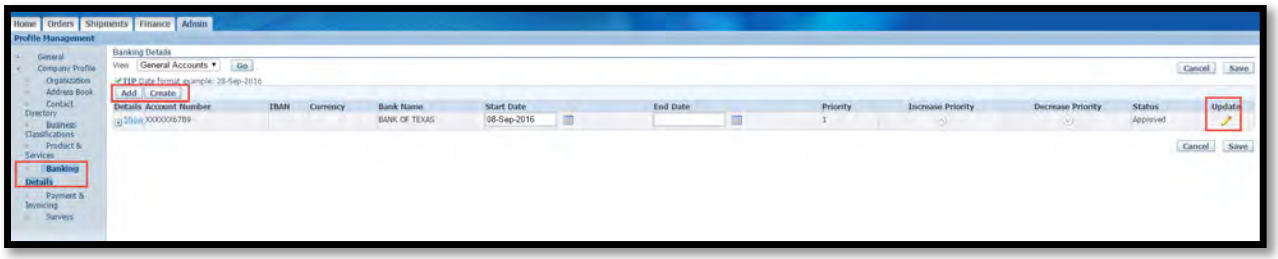
The business classification section allows you to maintain pertinent Business Classification information and recertify as needed. Any changes to these values will require approval by UL.



Save any changes made.

BANKING INFORMATION

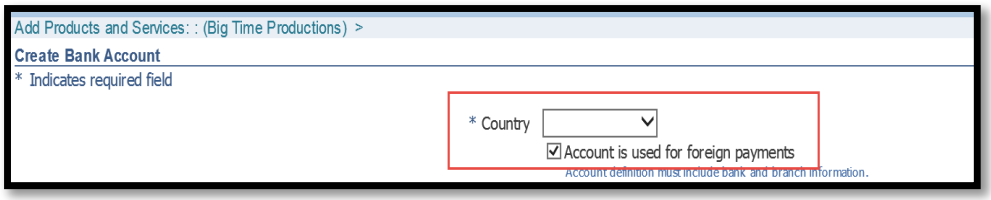
Manage your companies banking information through the iSupplier Portal. Any changes to the banking information will require approval from UL.



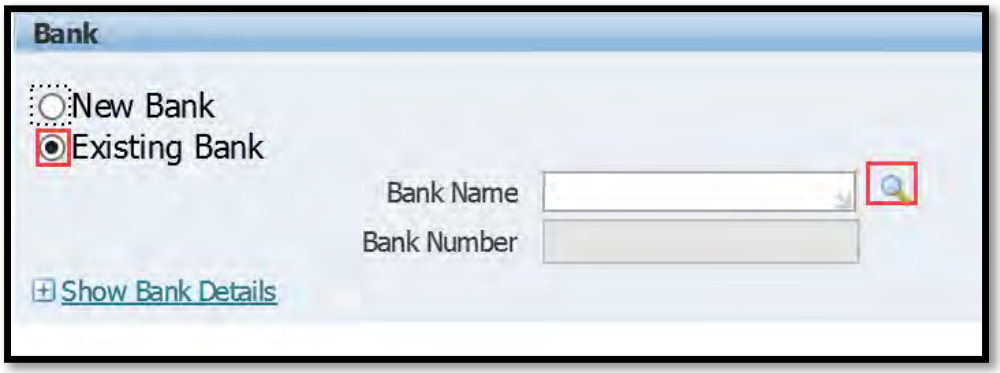
To add an existing bank account:

1. Click on the Create Button

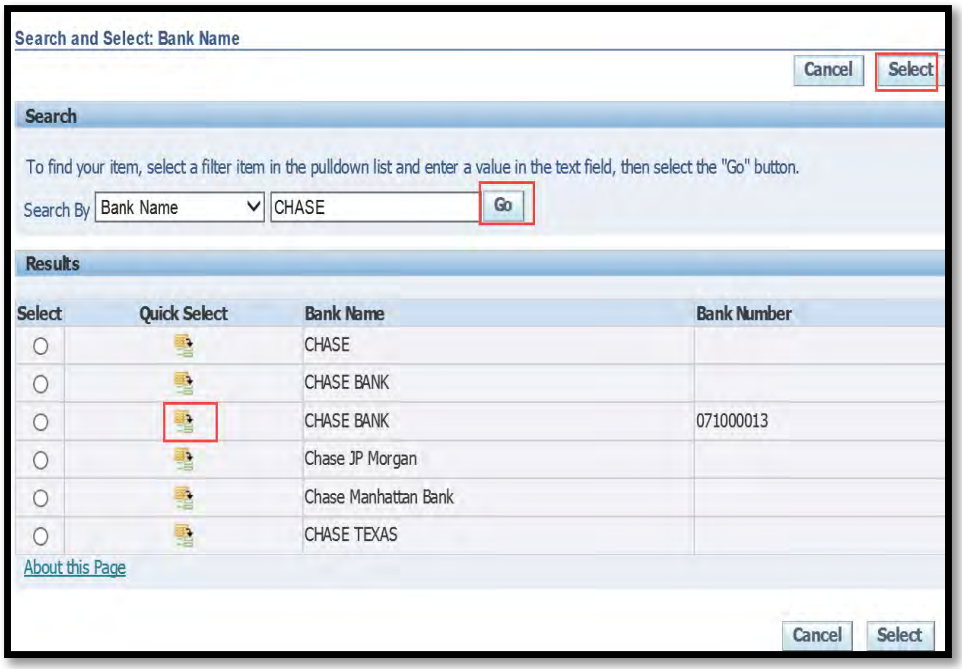
2. Select a country and check the box next to "Account is used for foreign payments" if this applies



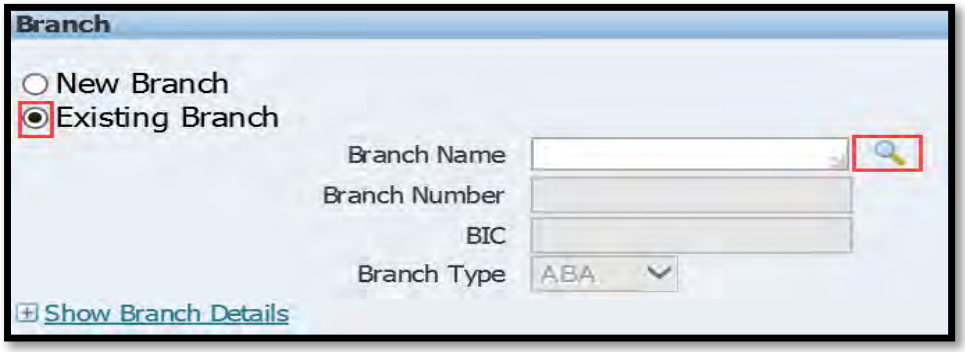
3. Next Choose Existing Bank and click on the magnifying glass to search for your bank (skip to h if your bank does not exist)



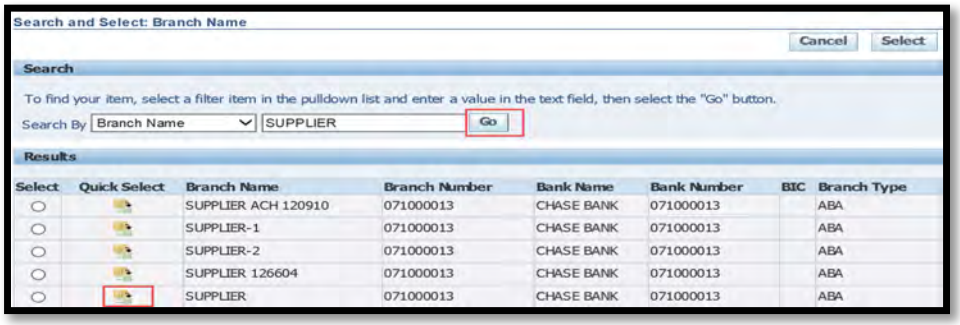
4. Type in a portion of the bank's name and then click Go



5. To page through the results, click on Next 10 until you see your bank's name. Click on the Quick Select button to choose your bank.
6. Next Choose an Existing Branch and click on the magnifying glass to search for your branch.

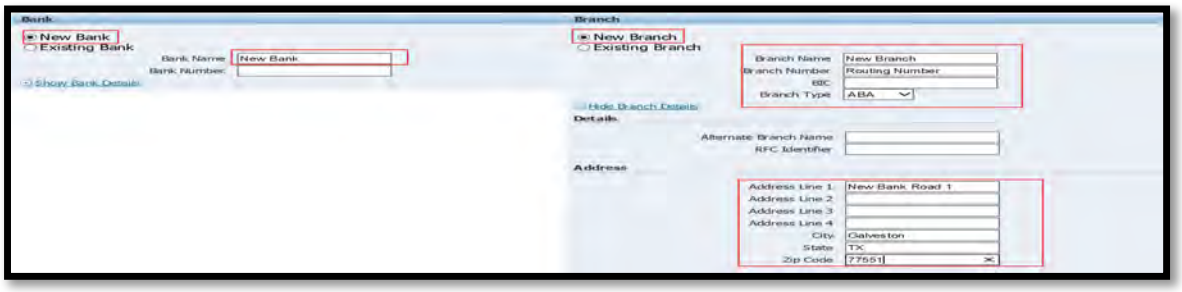


7. Using the quick select button select the appropriate site and click select.

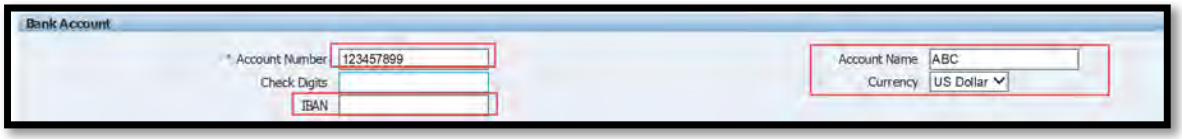


8. If your Bank does not exist, then choose the New Bank button and complete the Bank Name field.
9. Select New Branch and complete the following fields:
10. Branch Name
11. Branch Number (routing number)
12. Branch Type
13. Address Line 1
14. City

15. State
16. Zip



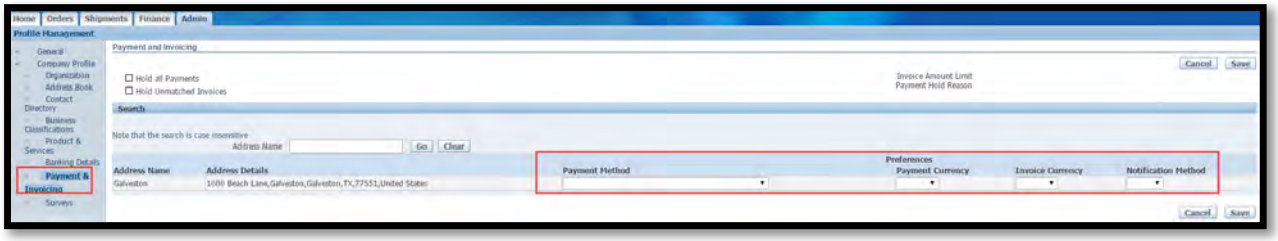
17. Complete the following fields for bank account:
18. Account Number
19. IBAN (if applicable)
20. Account Name (optional)
21. Currency



22. Click Apply when finished you will be returned to the Details page
23. Click Next

PAYMENT INFORMATION

Click the Payment Information link to update your company payment information such as method and currency.



Save your work after making changes.