

Agile Product Lifecycle Management for Process

Supplier Portal User Guide

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ABOUT THIS MANUAL

Agile Product Lifecycle Management for Process Documentation

The Agile Product Lifecycle Management (PLM) for Process documentation set includes user guides, an administrator's guide, and release notes, all in Adobe® Acrobat™ PDF format. The Oracle Documentation Web site contains the latest versions of the Agile PLM for Process PDF files. You can view or download these manuals from the Web site, or you can ask your administrator if there is an Agile PLM for Process Documentation folder available on your network from which you can access the documentation (PDF) files. Visit the Oracle Documentation Web site at:

<http://www.oracle.com/technology/documentation/index.html>

Note The minimum software requirement for reading the PDF files is Adobe Reader™ version 6.0. You can download this free program from www.adobe.com.

If you need additional assistance or information, please contact support@agile.com or phone (408) 284-3900 for assistance.

Before calling Agile Support about a problem with an Agile PLM for Process manual, please have ready the full part number, which is located on the cover.

Audience

This user guide is intended for end users who are responsible for creating and managing information in Agile Product Lifecycle Management for Process. Information about administering the system resides in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

Variability of Installations

Descriptions and illustrations of the Agile PLM for Process user interface included in this manual may not match your installation. The user interface of Agile PLM for Process applications and the features included can vary greatly depending on such variables as:

- ❑ Which applications your organization has purchased and installed
- ❑ Configuration settings that may turn features off or on
- ❑ Customization specific to your organization
- ❑ Security settings as they apply to the system and your user account

Where to Find Information

Consult the table below to find specific information from the relevant Agile PLM for Process information source.

Table 1: Agile PLM for Process documentation topics, by source

Information type	Supplier Portal User Guide	Admin. User Guide	Readme file	Agile training	Agile Help Desk	Agile sales rep
Administering Agile PLM for Process		●		●		
Approved registrations	●					
Cache management		●				
Core data management		●				
Custom data management		●				
Deactivated registrations	●					
Feature requests					●	●
Group management		●				
Installing Agile PLM for Process				●		●
Known issues			●			
Last-minute changes			●			
Managing registrations	●					
Rejected registrations	●					
Resolved issues			●			
System-based roles		●				
System requirements			●			
Technical support					●	
Using the Supplier Portal application	●					

Readme

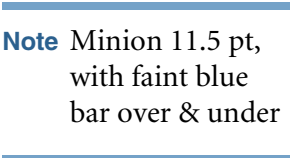
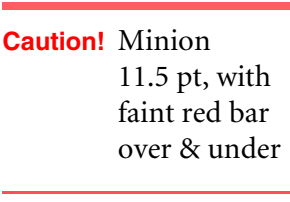
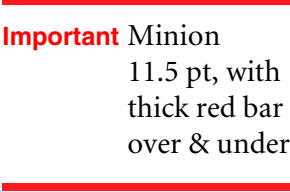
Any last-minute information about Agile PLM for Process can be found in the Readme file on the Oracle documentation Web site (<http://www.oracle.com/technology/documentation/index.html>).

Agile Training

Agile offers end user, administrator, developer, and implementation training courses. For more information, contact your Agile project manager or sales representative.

Document Conventions

The following formatting elements appear in Agile PLM for Process documentation.

Element	Meaning
Helvetica Condensed, 9 pt. bold type	A user interface (UI) element that a procedure is instructing you to click, select, or type into. For example, buttons or text entry fields.
9 pt. monospace font	Code samples
10 pt. monospace font	File names or directory names
<i>Blue italic font</i>	The linked portion of a cross-reference. Click it to go to the referenced heading, table, or figure.
Minion Typeface, Title Case	A named UI element that a procedure is describing but not instructing you to click, select, or type into.
 Note Minion 11.5 pt, with faint blue bar over & under	Alerts you to supplemental information.
 Caution! Minion 11.5 pt, with faint red bar over & under	Alerts you to possible data loss, breaches of security, or other more serious problems.
 Important Minion 11.5 pt, with thick red bar over & under	Alerts you to supplementary information that is essential to the completion of a task.

CHAPTER 1

Introduction

This chapter presents an overview of Supplier Portal and Supplier Portal Administration. Topics in this chapter include:

- ❑ *Supplier Portal Overview*
 - ❑ *Supplier Portal Administration Overview*
 - ❑ *Touch Points with Other Applications*
-

Supplier Portal Overview

Supplier Portal (SP) provides a central location for your company's supply chain partners to access specification data, review catalogs of procedural and standards documents, and manage contact information.

Refer to [Using Supplier Portal](#) on page 2-1 for more information on a supplier's use of Supplier Portal.

Supplier Portal Administration Overview

Administrators use the Supplier Portal Administration (SPA) application to manage Supplier Portal registrations.

Refer to [Using Supplier Portal Administration](#) on page 3-1 for more information on an administrator's use of Supplier Portal Administration.

For general information on using Agile Product Lifecycle Management for Process software, see the *Agile Product Lifecycle Management for Process Getting Started Guide*.

Touch Points with Other Applications

Supplier Portal and Supplier Portal Administration interface with several other Agile PLM for Process applications.

Global Specification Management

Suppliers can view specifications created in the Global Specification Management (GSM) application using Supplier Portal. Refer to [Accessing Specifications in Supplier Portal](#) on page 2-10, or for more information, see the *Agile Product Lifecycle Management for Process Global Specification Management User Guide*.

Supply Chain Relationship Management

Suppliers can view sourcing approvals, documents, and contacts for select companies and facilities using Supplier Portal. Sourcing approvals and contacts for companies and facilities are set up and maintained using the Supply Chain Relationship Management (SCRM) application. Refer to page 2-10 through page 2-16 for more information, or see the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide*.

Administrators control what information registrants see in Supplier Portal by assigning companies and facilities, which are set up in SCRM. Refer to [Assigning Companies or Facilities to a Supplier Portal User](#) on page 3-3 for more information.

Document Reference Library

Using Supplier Portal, suppliers can view documents and catalogs of documents stored in the Document Reference Library (DRL) application for their associated companies and facilities. Refer to [Accessing Document Reference Library](#) on page 2-17 for more information, or see the *Agile Product Lifecycle Management for Process Document Reference Library User Guide*.

CHAPTER 2

Using Supplier Portal

This chapter describes how a company and its suppliers use Supplier Portal. It includes the following topics:

- ❑ *Overview of Supplier Portal*
 - ❑ *Requesting Access to Supplier Portal*
 - ❑ *Accessing Specifications in Supplier Portal*
 - ❑ *Accessing Supplier and Facility Documents*
 - ❑ *Managing Contact Information*
 - ❑ *Accessing Document Reference Library*
-

Overview of Supplier Portal

Supplier Portal provides a central location for your company's supply chain partners to access specification data, review catalogs of procedural and standards documents, and manage contact information. It gives supply chain partners (such as vendors, suppliers, brokers, and distributors) the ability to:

- ❑ Obtain information regarding specifications that they have a sourcing relationship with
- ❑ Obtain guidance surrounding expectations of deliverables in the form of catalogs of documents from a managed library
- ❑ Manage contact data for personnel at their facilities
- ❑ View selected documentation related to suppliers' facilities, compliance, contracts, and specifications

Using Global Specification Management (GSM) and Supply Chain Relationship Management (SCRM), you can set restrictions that control the information that is visible to your suppliers.

This guide explains the use of:

- ❑ Supplier Portal (SP) from a *supplier perspective* in terms of functionality and information available. These topics are covered in this chapter, as well as a supplier requesting and receiving access to the Supplier Portal Web site.
- ❑ Supplier Portal Administrator (SPA) from a *company perspective* (granting access to Supplier Portal to a supplier). See Chapter 3, [*Using Supplier Portal Administration*](#) on page 3-1 for this information.

Requesting Access to Supplier Portal

Note This chapter is written for a company's suppliers who register for and use Supplier Portal.

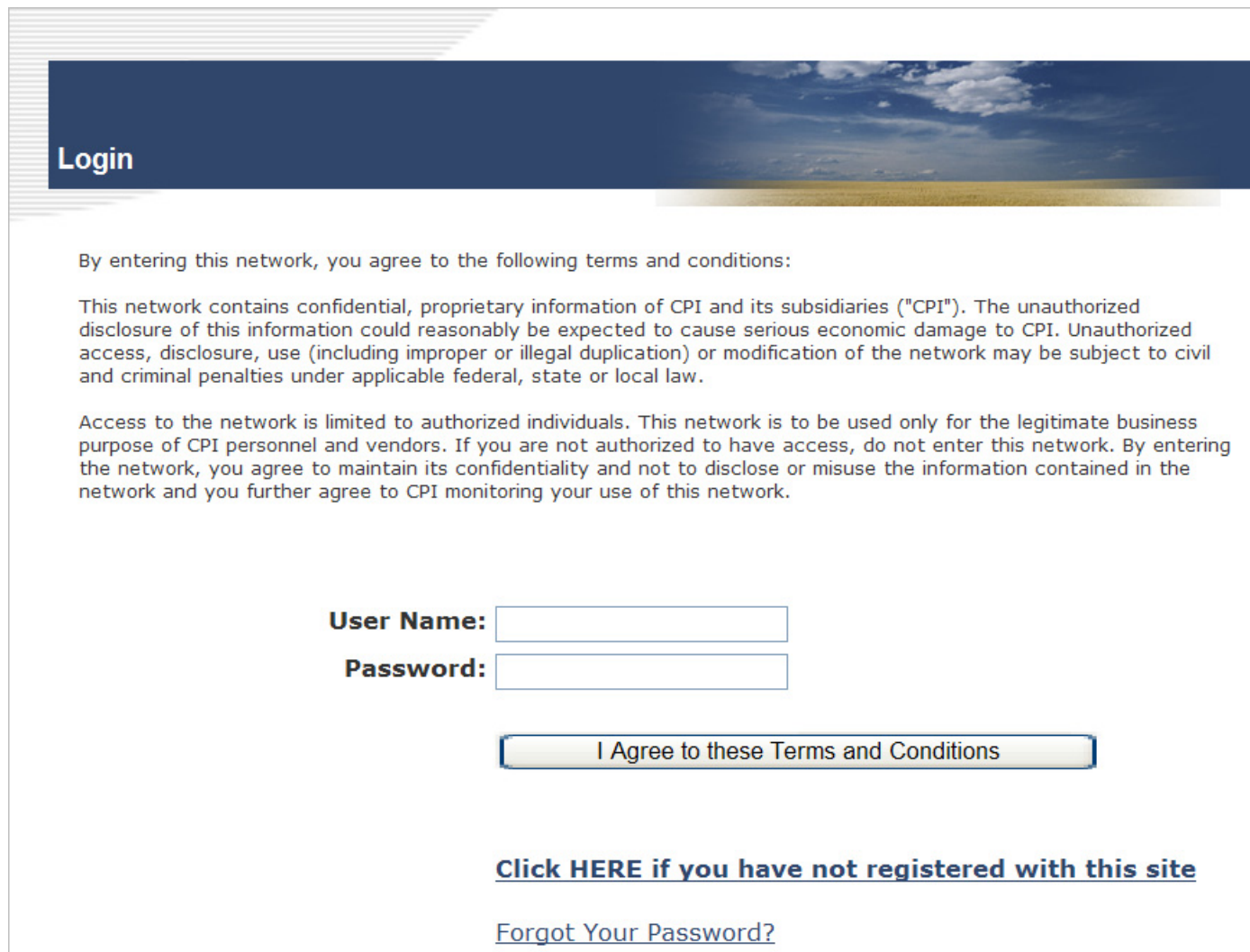
When the supplier accesses the Supplier Portal site, the Welcome page is displayed, as shown in figure 2-1.

Figure 2-1: Welcome page



The supplier clicks on the language of preference. If the supplier selects **English**, the Login page will be displayed, as shown in figure 2-2.

Figure 2-2: Login page



Login

By entering this network, you agree to the following terms and conditions:

This network contains confidential, proprietary information of CPI and its subsidiaries ("CPI"). The unauthorized disclosure of this information could reasonably be expected to cause serious economic damage to CPI. Unauthorized access, disclosure, use (including improper or illegal duplication) or modification of the network may be subject to civil and criminal penalties under applicable federal, state or local law.

Access to the network is limited to authorized individuals. This network is to be used only for the legitimate business purpose of CPI personnel and vendors. If you are not authorized to have access, do not enter this network. By entering the network, you agree to maintain its confidentiality and not to disclose or misuse the information contained in the network and you further agree to CPI monitoring your use of this network.

User Name:

Password:

[Click HERE if you have not registered with this site](#)

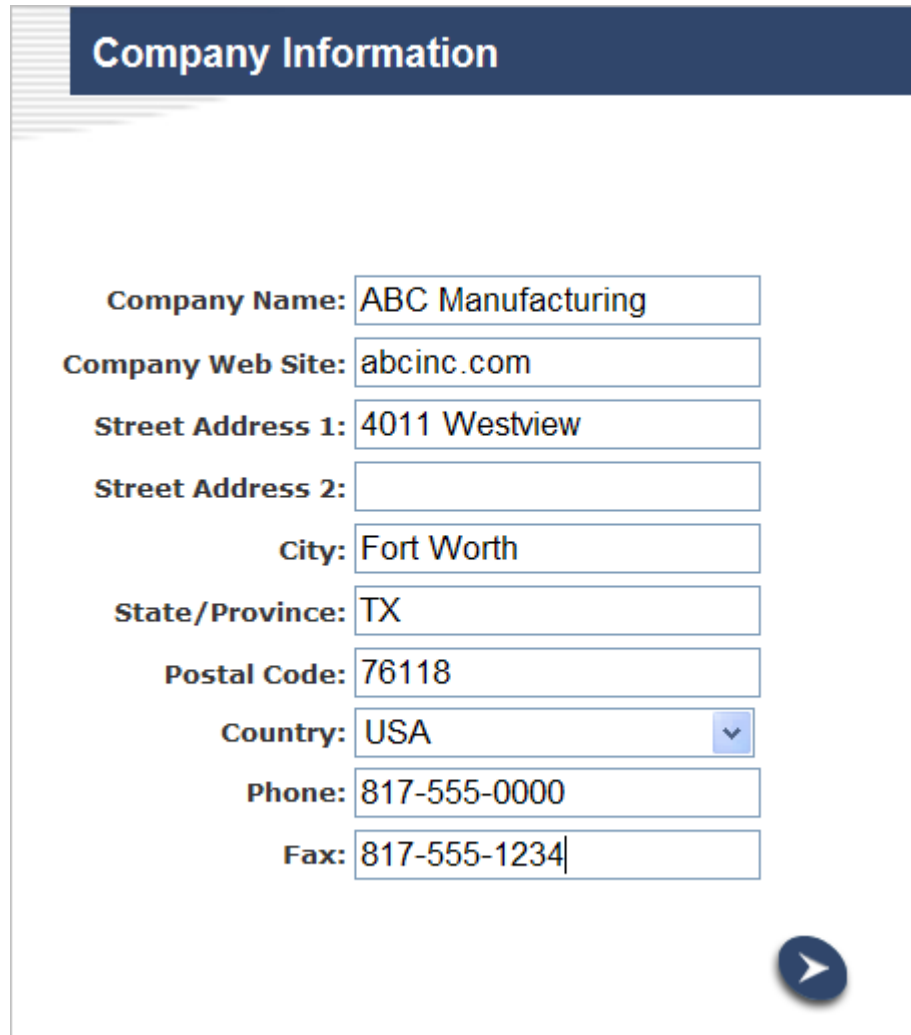
[Forgot Your Password?](#)

The supplier logs in using a user name and password. Or, if the supplier has not yet registered, the supplier clicks the **Click HERE if you have not registered with this site** link.

Note The user name is defined by the system based on the supplier's first and last name provided during the registration process. It is emailed to the user once approval has been granted.

Clicking the **Click HERE if you have not registered with this site** displays the first step in the registration process, the Company Information page, shown in figure 2-3.

Figure 2-3: Company Information page

The image shows a web form titled "Company Information" in a dark blue header. The form contains several input fields with labels to their left. The fields are filled with the following data: "Company Name" is "ABC Manufacturing", "Company Web Site" is "abcinc.com", "Street Address 1" is "4011 Westview", "Street Address 2" is empty, "City" is "Fort Worth", "State/Province" is "TX", "Postal Code" is "76118", "Country" is "USA" (with a dropdown arrow), "Phone" is "817-555-0000", and "Fax" is "817-555-1234". A blue circular button with a white right-pointing arrow is located at the bottom right of the form area.

Company Name:	ABC Manufacturing
Company Web Site:	abcinc.com
Street Address 1:	4011 Westview
Street Address 2:	
City:	Fort Worth
State/Province:	TX
Postal Code:	76118
Country:	USA ▼
Phone:	817-555-0000
Fax:	817-555-1234

This is the first page where a supplier fills out company information. The following fields are required:

- Company Name
- Company Web Site
- Street Address 1
- City
- State/Province
- Postal Code
- Country
- Phone
- Fax


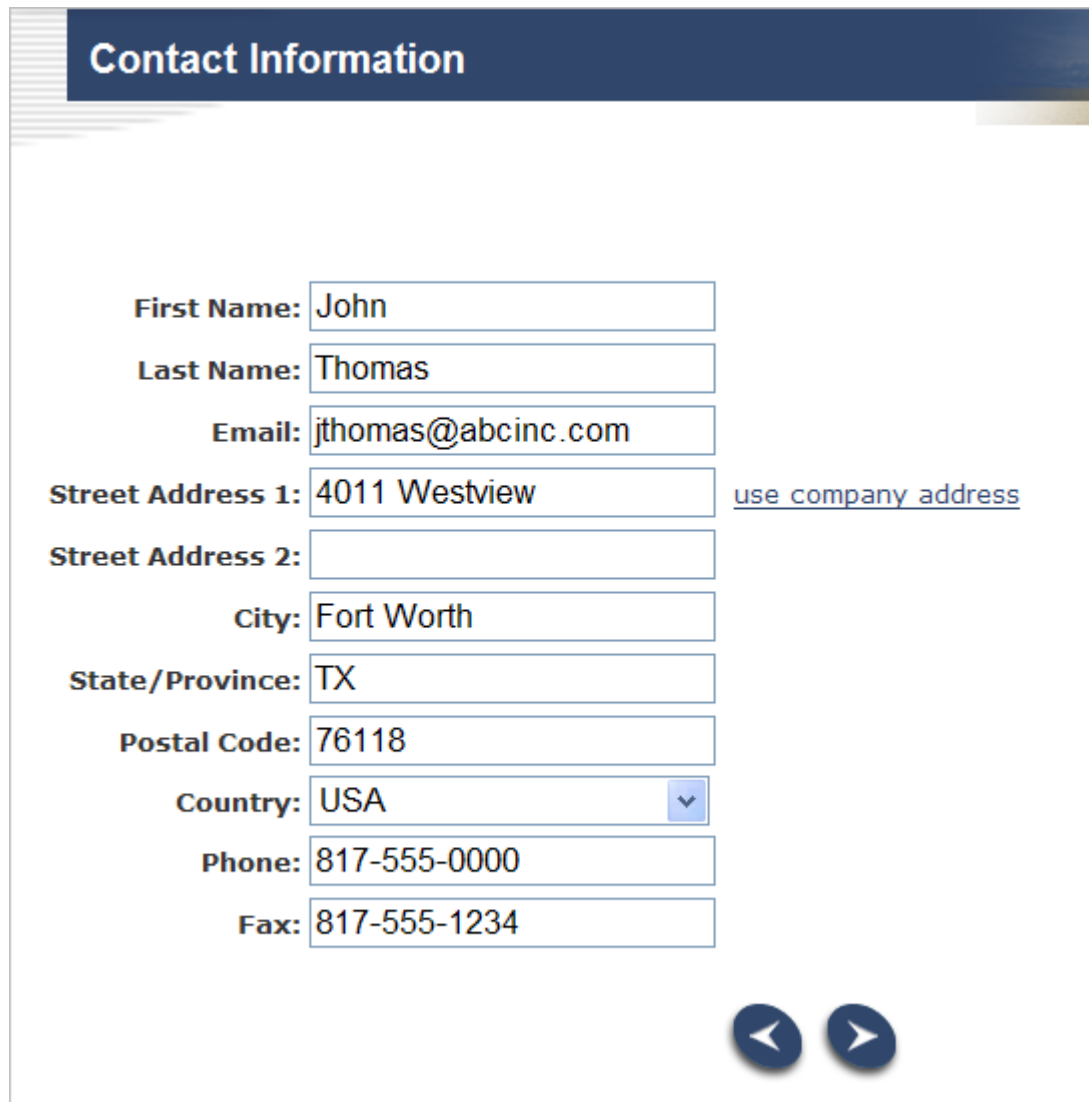



The supplier fills in the company information and clicks the next page icon ().
The Contact Information page is displayed, as figure 2-4 shows below:

Figure 2-4: Contact Information page



The image shows a web form titled "Contact Information" with a dark blue header. The form contains several input fields for contact details. The fields are labeled as follows: "First Name:" with the value "John", "Last Name:" with the value "Thomas", "Email:" with the value "jthomas@abcinc.com", "Street Address 1:" with the value "4011 Westview", "Street Address 2:" which is empty, "City:" with the value "Fort Worth", "State/Province:" with the value "TX", "Postal Code:" with the value "76118", "Country:" with a dropdown menu showing "USA", "Phone:" with the value "817-555-0000", and "Fax:" with the value "817-555-1234". To the right of the "Street Address 1" field, there is a blue underlined text link that says "use company address". At the bottom right of the form, there are two circular navigation buttons: a left arrow and a right arrow.

First Name:	<input type="text" value="John"/>	
Last Name:	<input type="text" value="Thomas"/>	
Email:	<input type="text" value="jthomas@abcinc.com"/>	
Street Address 1:	<input type="text" value="4011 Westview"/>	use company address
Street Address 2:	<input type="text"/>	
City:	<input type="text" value="Fort Worth"/>	
State/Province:	<input type="text" value="TX"/>	
Postal Code:	<input type="text" value="76118"/>	
Country:	<input type="text" value="USA"/>	
Phone:	<input type="text" value="817-555-0000"/>	
Fax:	<input type="text" value="817-555-1234"/>	

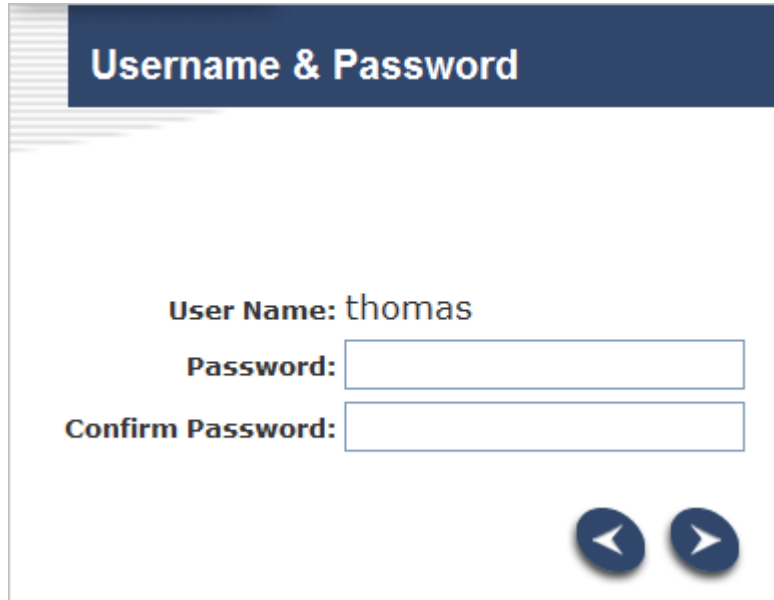
This is the second registration page where a supplier provides contact information. The following fields are required:

- First Name
- Last Name
- Email
- Street Address 1
- City
- State/Province
- Postal Code
- Country

- Phone
- Fax

The supplier fills in the fields and clicks the next page icon (➡) to go forward, or clicks the previous page icon (⬅) to update information on prior pages. The supplier can click the **use company address** link and the system will populate the address fields from the previous page. Clicking the next page icon (➡) displays the Username & Password page, shown in figure 2-5 below.

Figure 2-5: Username & Password page

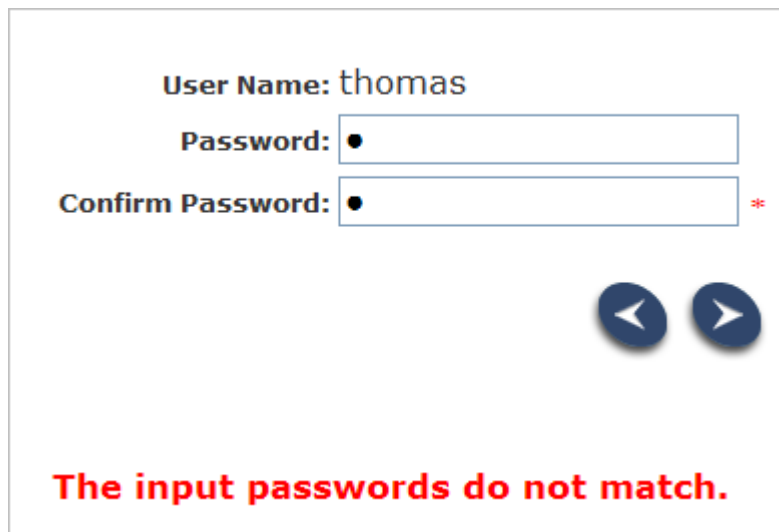
The screenshot shows a web form titled "Username & Password" in a dark blue header. Below the header, the text "User Name: thomas" is displayed. Underneath, there are two input fields: "Password:" followed by an empty text box, and "Confirm Password:" followed by another empty text box. At the bottom right of the form, there are two circular navigation buttons: a left-pointing arrow (⬅) and a right-pointing arrow (➡).

This is the third page of the registration process. The User Name field displays the system defined user name. The supplier enters a password in the **Password** field, and confirms it by typing it again in the **Confirm Password** field.

If the passwords do not match, an error message is displayed as shown in figure 2-6 below.

Once a valid user name and password is entered, the supplier can click the previous page icon (⬅) to update information on prior pages, or move forward by clicking the next page icon (➡), as illustrated in figure 2-5 above.

Figure 2-6: Error message

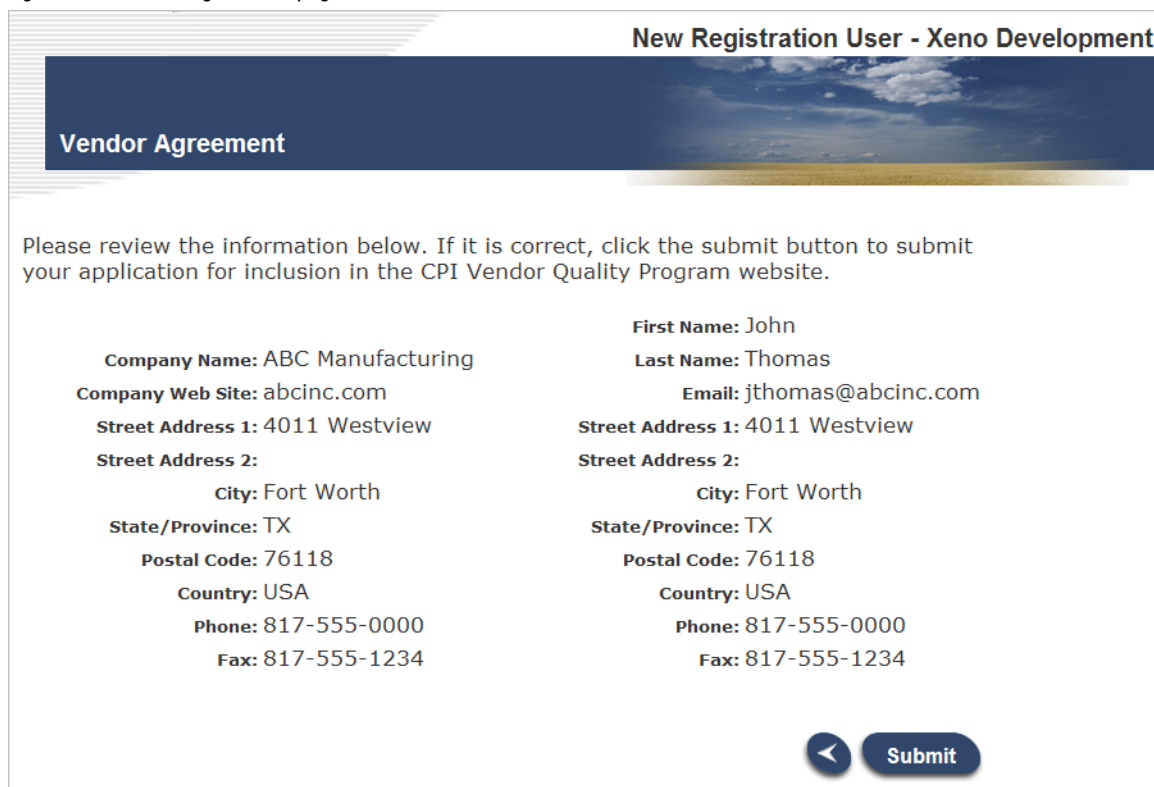


The screenshot shows a login interface with the following elements:

- User Name:** thomas
- Password:** [input field with a black dot]
- Confirm Password:** [input field with a black dot]
- Navigation buttons: A left arrow and a right arrow.
- Error Message:** "The input passwords do not match." displayed in red text at the bottom.

The Vendor Agreement page, shown in figure 2-7, is the final place for the supplier to review the information provided before submitting the registration request.

Figure 2-7: Vendor Agreement page



The screenshot displays the "Vendor Agreement" page for a "New Registration User - Xeno Development". The page includes a header with the title "Vendor Agreement" and a background image of a landscape. Below the header, a message states: "Please review the information below. If it is correct, click the submit button to submit your application for inclusion in the CPI Vendor Quality Program website."

The page is divided into two columns of information:

Company Name: ABC Manufacturing	First Name: John
Company Web Site: abcinc.com	Last Name: Thomas
Street Address 1: 4011 Westview	Email: jthomas@abcinc.com
Street Address 2:	Street Address 1: 4011 Westview
City: Fort Worth	Street Address 2:
State/Province: TX	City: Fort Worth
Postal Code: 76118	State/Province: TX
Country: USA	Postal Code: 76118
Phone: 817-555-0000	Country: USA
Fax: 817-555-1234	Phone: 817-555-0000
	Fax: 817-555-1234

At the bottom right, there is a navigation button (left arrow) and a "Submit" button.


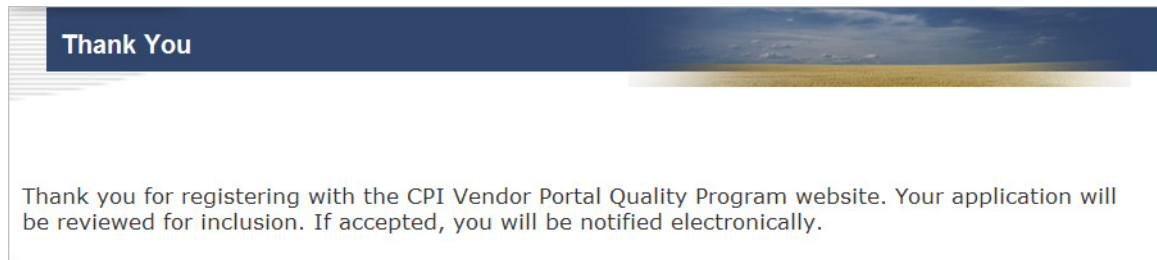
When the supplier clicks the Submit button (), the request is sent to the Supplier Portal Administration (SPA) application. The Thank You confirmation page, shown in figure 2-8 below, is displayed. The Thank You page confirms that the request has been successfully sent. The supplier now waits for approval from the Supplier Portal administrator.

Figure 2-8: Thank You page



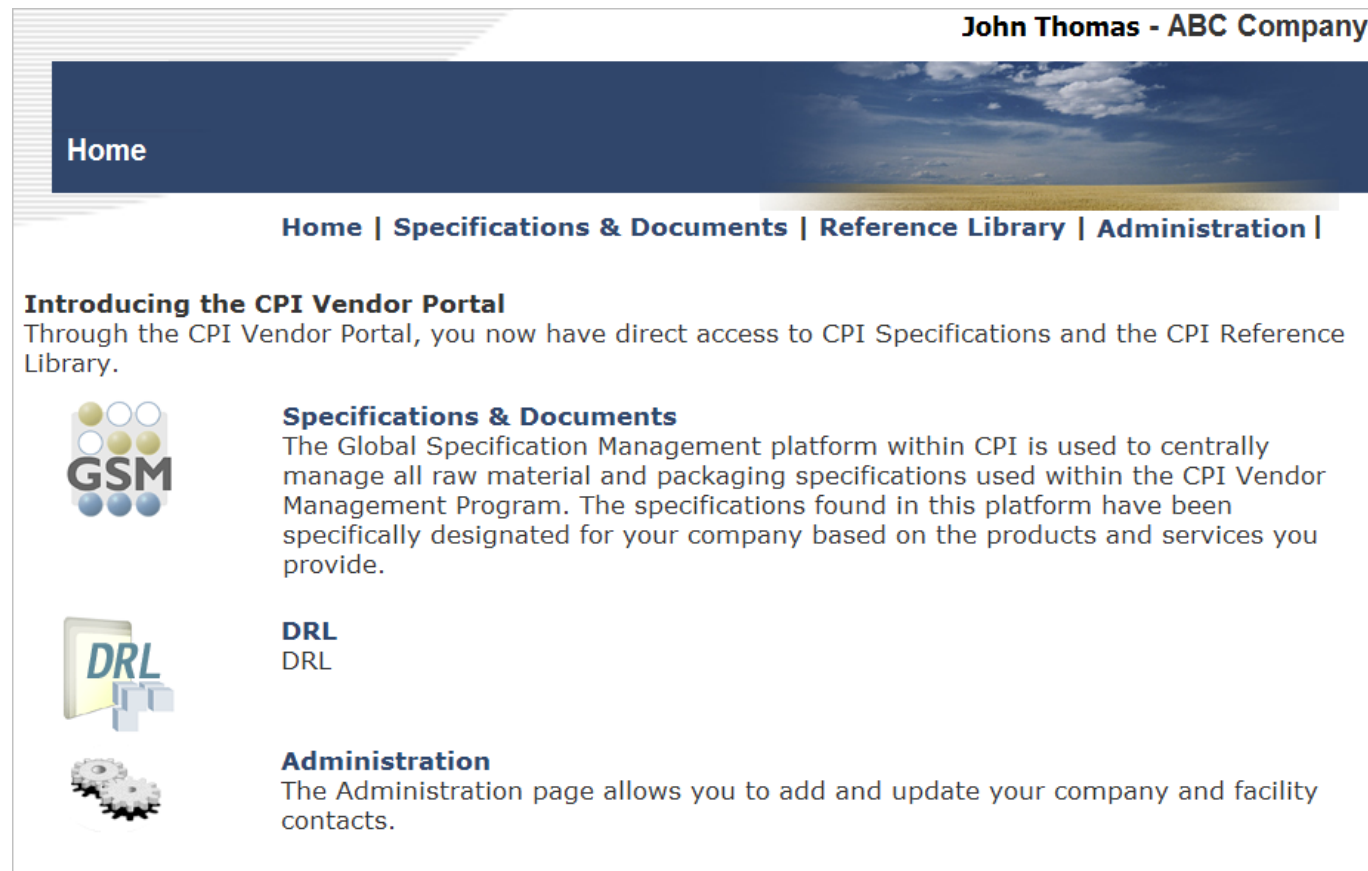
The administrator accesses Supplier Portal Administration (SPA) and views the registration request. The administrator can either grant or deny the request from the supplier. When the administrator approves the request from the supplier, the supplier will receive an email confirming that the request has been granted. The administrator will also associate the appropriate companies and facilities to the supplier, as this will help determine the specification and contact information the supplier will see in Supplier Portal. Refer to [Using Supplier Portal Administration](#) on page 3-1 for more information.

When the administrator grants the request from the supplier, the supplier will be sent an email confirming that the request has been granted.

Once logged into Supplier Portal, the supplier will be able to view those specifications for which they have sourcing approvals. Several criteria are used to decide which specifications will be visible to the supplier. These are described in more detail later in this chapter.

On logging in, the supplier will see the page shown in figure 2-9. This is the Home page of Supplier Portal.

Figure 2-9: Home page



The supplier can perform the following tasks using Supplier Portal:

- View raw material specifications such as ingredient, product, and packaging material specifications
- View public documents attached to these specifications
- View related specifications
- View public documents attached to the sourcing approvals
- View selected documents in the Document Reference Library (DRL)
- View selected documents attached to the supplier
- View selected documents attached to facilities
- Manage contact information for companies and facilities that the supplier has been associated with

Accessing Specifications in Supplier Portal

The supplier can view specification-related information by clicking **Specifications & Documents** in the navigation bar. The Specifications & Documents page is displayed, as figure 2-10 shows below. The listing displays the name of the specification in addition to sourcing approval information.

Figure 2-10: Specifications & Documents page, Specification(s) tab

Specifications & Documents

Home | Specifications & Documents | Reference Library | Administration |

Specification(s) Documents

Group By: Receiving Facilities Order By: Spec Name Refresh

Dallas DC

Spec Name	Source Company	Source Facility	Receiving Facilities	Sourcing Approval Status	Supplier Item #	Sourcing Documentation
Fiji Apple - Sourcing App. (5081039-001 -- Draft Review)	ABC Food Ingredients Co.	Dallas DC	Dallas DC	Draft		Non-SDM Doc

Empty group data (Receiving Facilities)

Spec Name	Source Company	Source Facility	Receiving Facilities	Sourcing Approval Status	Supplier Item #	Sourcing Documentation
Rome Apples (5083821-001 -- Draft)	ABC Food Ingredients Co.	Dallas DC		Draft		

The Specification(s) tab includes two drop-down lists used to categorize the specification listing:

- 1 **Group By**—Select a choice to group the specifications by:
 - Source Company
 - Source Facility
 - Receiving Facilities
 - Sourcing Approval Status
 - No grouping at all
- 2 **Order By**—Select a choice to order the specifications by:
 - Spec Name
 - Source Company
 - Source Facility
 - Sourcing Approval Status
 - Supplier Item #

The supplier clicks the **Refresh** button after making selections from the drop-down lists.

Each specification is listed with the following key information:

- **Spec Name**—The specification name
- **Source Company**—The company sourcing this specification
- **Source Facility**—The facility sourcing this specification
- **Receiving Facilities**—The facilities that receive this specification

- **Sourcing Approval Status**—The status of the sourcing approval (draft, approved, etc.)
- **Supplier Item #**—The unique ID assigned by the supplier.
- **Sourcing Documentation**—The field displays attachments associated with a sourcing approval. It does not include sourcing approval supplier documents.

The supplier clicks on the specification link to view details about the specification in the Print dialog box, as figure 2-11 shows below.

Figure 2-11: Print dialog box

Specification Type	Sections	Attachments
Current Specification	<input type="checkbox"/> 4039-001 v480-rc6 Packaging Material Regression TMC 20060831 from EQ (31-Aug-2006)	Test.txt
	<input type="checkbox"/> Rich Text - Please red	
Packing Configuration Specs	<input type="checkbox"/> 5081000-001 v480-rc6 Packing Config 20060831 (31-Aug-2006)	
	<input type="checkbox"/> Rich Text - Please read	
Delivered Material Packing Specs	<input type="checkbox"/> 5080763-001 v480-rc2 Delivered Mater 20060823 (23-Aug-2006)	
	<input type="checkbox"/> Rich Text - Please read	

Information printed from this dialog box reflects the data as it currently exists in GSM. The supplier can decide to print the details of the specification or details about related specifications. In the figure above, the primary specification has several related specifications. The supplier can also print the shared documents attached to these specifications. Once the supplier has made selections, clicking **Print** generates a .pdf document with the selected information from the Print dialog box. The supplier can then print the PDF file as needed.

Accessing Supplier and Facility Documents

The Documents tab lists all the shared supplier documents and attachments that are included on company and facility profiles. Documents must meet the following criteria to be displayed:

- The document must be marked as “Publish to Supplier Portal” in GSM and SCRM, and
- The document must be assigned an access classification of “0”. For more information on access classifications, refer to the Object Level Security chapter of the *Agile Product Lifecycle Management for Process Administrator User Guide*.

If the customer has shared any documents that are attached to the supplier’s company profile or any of the facility profiles, the documents appear here. Figure 2-12 below shows documents attached to the supplier company and facilities.

Figure 2-12: Specifications & Documents page, Documents tab

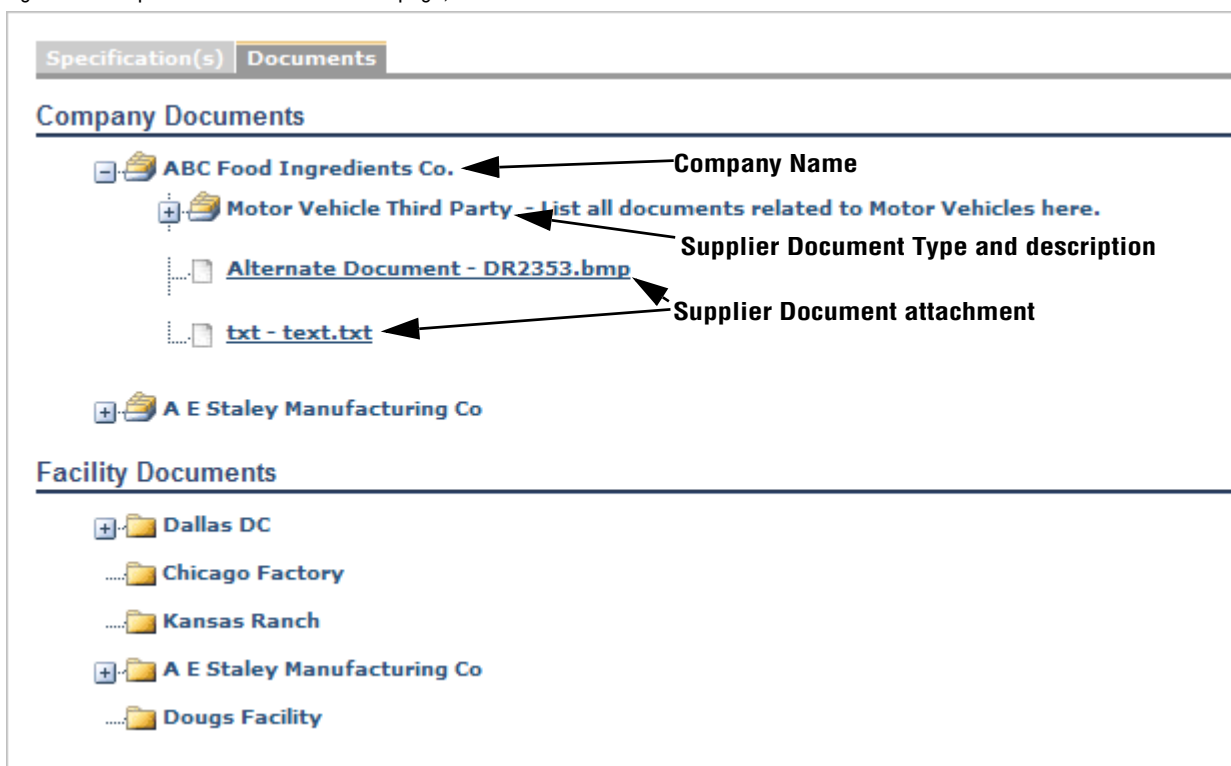



Figure 2-12 above shows the hierarchy of how the documents are stored. The Supplier Document Type feature works much like a folder in that it holds related files in one spot. You can click the expand node icon () to expand the listing, or “open” the folder. Files can be attached independently to a company or facility (as attachments) or can be included in a supplier document. The dashed lines show where the documents are attached.

Click any linked file name to open the file.

Managing Contact Information

Supplier contact information can be shared from the Supply Chain Relationship Management (SCRM) application. If the contact information is shared, the supplier can view and manage that information from Supplier Portal.

The manage contact feature enables suppliers to manage their contact information and keep it accurate on an ongoing basis.

Clicking the **Administration** link displays the Administration page shown in figure 2-13 below.

Note The Administration link displays only if the contact has at least one associated supplier. This association is made in Supplier Portal Administration (SPA).

Figure 2-13: Administration page, Managing Your Contact Information



In SCRM, contacts can be assigned at both the company and facility level. The supplier sees all the companies and facilities he or she has been assigned to. This page lists all of the contacts that are set to be published to the supplier. The contacts are listed by company and further filtered by facility.

The supplier selects the company name to see the company contacts located on the company profile, or selects the facility name to see the facility contacts located on the facility profile.

Refer to [Using Supplier Portal Administration](#) on page 3-1 for more information on how an administrator associates a supplier to a contact. The supplier can click on either a supplier's company or a facility name to view the associated contacts. Figure 2-14 below shows the summary page for the selected company or facility.

Figure 2-14: Summary page for selected company or facility

Administration

Home | Specifications & Documents | Reference Library | Administration

Done

Company / Facility Info

Name: ABC Food Ingredients Co.
Street Address 1: P O Box 22360
Street Address 2: 55555
City: Sandia
State/Province: CA
Postal Code: 95333
Country: USA
Website: www
Phone: 555
Fax: 555

Postal Address:

City:
State/Province:
Zip Code: 95333
Country:

Contacts

Name	Title	Category	Phone	Mobile/Pager	Email	
Eric Jones	Sales Manager	Sales/Service	555-555-5555	444-444-4444	ejones@abcfoods.com	✖
1						

Add New

The supplier has several options for managing contacts:

- Clicking the name link displays the details about the supplier contact.
- Clicking the delete icon (✖) deletes the contact.
- Clicking **Add New** displays the Contact Information page, shown in figure 2-15 below. The supplier creates a new contact using this page.
- Clicking the **Done** button saves changes made to the contact.

Note When a new contact is added to Supplier Portal, the contact is added to the corresponding company or facility in SCRM.

The Contact Information dialog box provides contact details, as shown in figure 2-15 below.

Figure 2-15: Contact Information page with contact information populated automatically

Save Save & Close Cancel

Contact Information

First Name: Eric

Last Name: Jones

Contact Category: Sales/Service

Job Title: Sales Manager

Phone: 555-555-5555

Mobile/Pager: 444-444-4444

Fax: 333-333-3333

Email: ejones@abcfoods.com

Street Address: P O Box 22360 « Import

City: Sandia

State/Province: CA

Postal Code: 95333

Country: USA

Emergency Contact: ☒

Emergency Phone: 222-222-2222

Click here to display available addresses

Additional Notes

Description: Eric needs to be contacted if our specifications change

The address of the contact can be imported from other addresses stored in the system. Clicking the **Import** link displays the dialog box shown in figure 2-16. The dialog box displays addresses that are associated with this supplier. The supplier can click one of the addresses to use that address.

Figure 2-16: Contact addresses

The image shows a window with three contact address labels. Each label is a blue-bordered box containing text. The first label is for 'ABC Food Ingredients Co.' with address 'P O Box 22360, 55555, Sandia, CA 95333, USA'. The second label is for 'Eric Jones' with address '1234 Main Street, Dallas, Texas 76654, USA'. The third label is for 'Jane Doe' with address 'P O Box 22360, 55555, Sandia, CA 95333, USA'. A 'Cancel' button is in the top right corner.

Contact Name	Address Line 1	Address Line 2	Address Line 3	Address Line 4
ABC Food Ingredients Co.	P O Box 22360	55555	Sandia, CA 95333	USA
Eric Jones	1234 Main Street	Dallas, Texas 76654	USA	
Jane Doe	P O Box 22360	55555	Sandia, CA 95333	USA

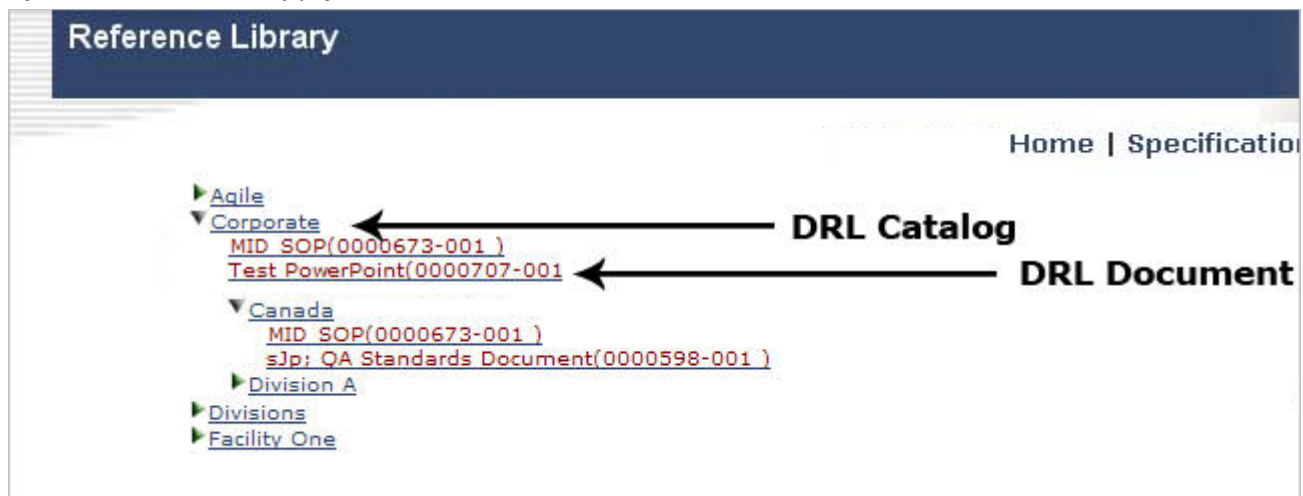
Accessing Document Reference Library

This page shows Document Reference Library (DRL) catalogs and documents available to the supplier. This visibility is set up in SCRM under the DRL Catalog tab. The catalogs and documents are set up in DRL. The supplier has access to documents attached in DRL if:

- The document belongs to a document catalog that is associated with the supplier, and
- The document is marked “Publish to Supplier Portal” in the DRL application

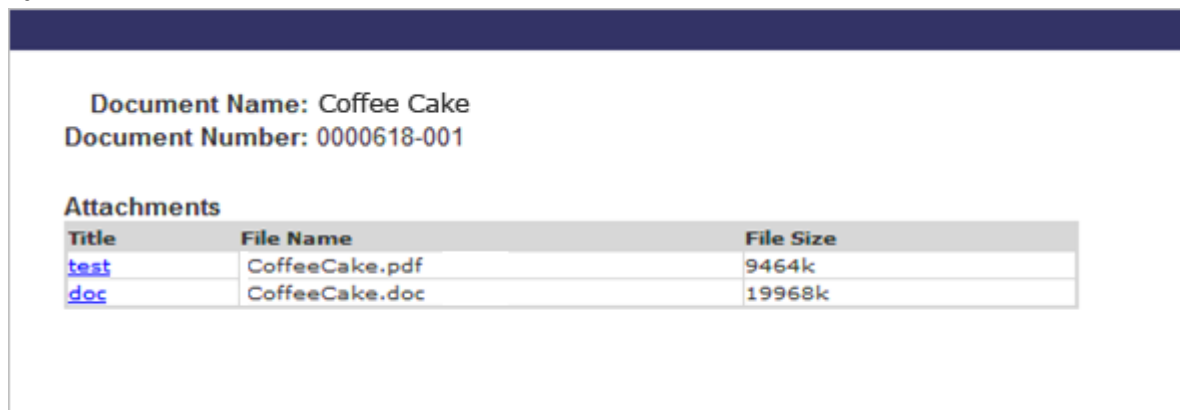
The supplier can view the DRL catalogs and the documents in the catalog by clicking the **Reference Library** link. Figure 2-17 below displays the Reference Library page.

Figure 2-17: Reference Library page



A DRL document can have one or more files called attachments. Clicking the DRL document name will display the DRL document’s identifying information and all of its attachments, as shown in figure 2-18 below.

Figure 2-18: DRL document detail



The supplier can click on an individual attachment to view or print it.

Refer to the *Agile Product Lifecycle Management for Process Document Reference Library User Guide* for more details on DRL.

Refer to the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide* for more details on SCRM.

Using Supplier Portal Administration

This chapter describes how an administrator uses Supplier Portal Administration. It includes the following topics:

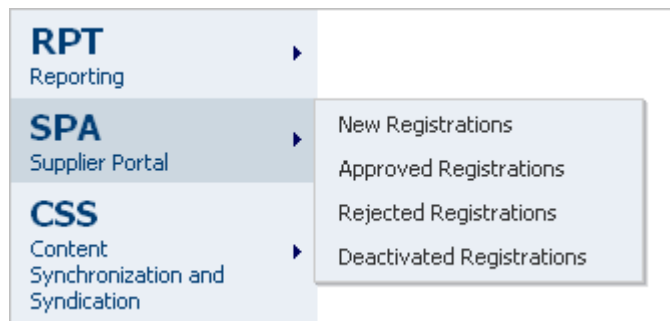
- ❑ *Accessing Supplier Portal Administration*
- ❑ *Processing New Registration Requests*
- ❑ *Managing Approved Registrations*
- ❑ *Managing Rejected Registrations*
- ❑ *Managing Deactivated Registrations*
- ❑ *Access Control and Visibility*

Accessing Supplier Portal Administration

Note This chapter is written for company administrators who use Supplier Portal Administration (SPA) to manage suppliers who register for and use Supplier Portal.

Company administrators use the Supplier Portal Administration (SPA) application to control access to Supplier Portal. The SPA menu choices represent administrative tasks associated with Supply Portal registrations, as figure 3-1 shows below:

Figure 3-1: Menu choices



The following menu choices are available:

- **New Registrations**—Use this option to manage requests from users wanting to access Supplier Portal for the first time.
- **Approved Registrations**—Use this option to manage all approved users.
- **Rejected Registrations**—Use this option to manage all users who were not approved.
- **Deactivated Registrations**—Use this option to manage users who were once approved and are now deactivated.

Processing New Registration Requests

When a supplier requests access to Supplier Portal, a new registration request is created in SPA. The New Registrations page lists registrants waiting for approval, as shown in figure 3-2 below.

Figure 3-2: New Registrations page



Supplier Representative Editor Page

Clicking the hypertext name link located in the gray shaded area displays the registration request on the Supplier Representative Editor page, as shown in figure 3-3 below:

Figure 3-3: Supplier Representative Editor page

Supplier Representative Editor

Company Information | **Contact Information** | **Status/Actions**

Company Information

Company Name: International Shipping
Website: www.iship.com
Street Address 1: 56783 Commerce Blvd
Street Address 2: Tower 12
City: Anytown
State/Province: CA
Postal Code: 88888
Country: USA
Phone: 123-234-2342
Fax: 574-234-2342

Associated Companies

Associated Facilities

You can now associate facilities with suppliers.

The administrator uses the three tabs on this page to review and approve the registrant.

Company Information Tab

The Company Information tab displays all the company information that the registrant supplied. The administrator can use this page to update the company information if necessary. Note that the new registrant is not yet associated with any company or facility in SCRM.

Associated Companies and Associated Facilities are key fields. The administrator uses these fields to tie a supplier to companies or facilities. Doing so affects what data the supplier will see inside Supplier Portal.

Click **Edit** to open the page in edit mode.

Assigning Companies or Facilities to a Supplier Portal User

For a registrant to be able to view specifications and contact information in Supplier Portal, he must be associated with one or more companies or facilities. The Associated Companies section contains a table with associated companies; the Associated Facilities section contains a table with associated facilities.

The administrator clicks **Add New** under either table to assign a company or facility to the registrant. This action displays the standard search page. The administrator selects one or more companies or facilities, then clicks **Done**.

Note If a facility is assigned to a registrant, only the specifications, documents and contacts for that facility will be available for viewing. If a company is assigned to the registrant, data for all facilities belonging to that company will be available for viewing.

Added companies and facilities are displayed in the Associated Companies and Associated Facilities sections, as shown in figure 3-4.

Figure 3-4: Company Information tab with associated company and facility

Supplier Representative Editor

Company Information
Contact Information
Status/Actions

Company Information

Company Name:
Website:
Street Address 1:
Street Address 2:
City:
State/Province:
Postal Code:
Country:
Phone:
Fax:

Associated Companies

Company (Prodika#)	Company Name	
5010731	ABC Food Ingredients Co.	✖

Associated Facilities

Facility (Prodika#)	Facility Name	Company Name	
5011163	Asia Vendor Facility	Asia Vendor Company	✖

Clicking the delete icon (✖) removes the associated company or facility.

Contact Information Tab

The Contact Information tab, shown in figure 3-5, displays the contact information that the registrant has provided.

Figure 3-5: Contact tab with registrant information in edit mode

The screenshot shows a web form titled "Supplier Representative Editor" with three tabs: "Company Information", "Contact Information" (which is selected), and "Status/Actions". At the top right of the form are three buttons: "Save", "Save & Close", and "Cancel". The "Contact Information" tab contains the following fields:

- Contact Search Enabled:** A checkbox that is checked, indicated by a green checkmark icon.
- First Name:** A text input field containing "Sandra".
- Last Name:** A text input field containing "Simmons".
- User Name:** A text input field containing "simmons".
- Email:** A text input field containing "ssimons@iship.com".
- Street Address 1:** A text input field containing "56783 Commerce Blvd".
- Street Address 2:** A text input field containing "Tower 12".
- City:** A text input field containing "Anytown".
- State/Province:** A text input field containing "California".
- Postal Code:** A text input field containing "88888".
- Country:** A dropdown menu with "USA" selected.
- Phone:** A text input field containing "123-234-2342".
- Fax:** A text input field containing "574-234-2342".

The user name is automatically generated by the system. The administrator can change the user name if needed.

Status/Actions Tab

The Status/Actions tab, shown in figure 3-6, displays the current status of the registrant. This tab has three sections:

- **Next Action**—Shows the actions possible on this user at this time. The administrator can either approve or reject a new request by clicking the appropriate button. The system sends an email if the registrant is approved.
- **Current Status**—Displays the time stamp when the request was made and the status of the user request.
- **Event History**—Displays events that have been performed.

Figure 3-6: Status/Actions tab

Supplier Representative Editor

Company Information **Contact Information** **Status/Actions**

Next Action

Approve This action will approve the submitted application and enable the user to log into the Vendor Portal

Reject This action will reject the submitted application and not allow the user to log into the Vendor Portal

Current Status

Registration Date: 11/29/2007 9:15 AM
Current Status: New

Event History

Event	User	Time
Added Company - ABC Company	John Smith	11/29/2007 10:01 AM
Added Company - ABC Foods	John Smith	11/29/2007 10:01 AM

If the administrator clicks **Approve**, the current status will change to “Approved” and an event will be added to Event History. On approval, an email will be sent to the registrant, informing him that his account is now active.

At this point, the registration request will no longer be visible on the New Registrations page.

If the administrator clicks **Reject**, the current status will change to “Rejected” and an event will be added to Event History.

At this point, the registration request will no longer be visible on the New Registrations page and will be visible on the Rejected Registrations page.

The administrator must click **Save** or **Save & Close** for the changes to take effect.

Managing Approved Registrations

The Approved Registrations page displays all of the registrants that have been approved to access Supplier Portal, as figure 3-7 shows below.

Figure 3-7: Approved Registrations page

Approved Registrations

Sandra Simmons - ssimmons	John Anderson - janderson
56783 Commerce Blvd Tower 12 Anytown California, 88888 123-234-2342 574-234-2342 International Shipping www.iship.com 56783 Commerce Blvd Tower 12 Anytown California, 88888 USA 123-234-2342	6532 Business Ave Suite 320 Anytown Texas, 76422 USA 222-222-2222 555-555-5555 Dairy's Best www.dairysbest.com 6532 Business Ave Suite 320 Anytown Texas, 76422 USA 222-222-2222

To obtain more information about the registrant, the administrator can click on the first and last name link on the Approved Registrations page. The Supplier Representative Editor page displays, as described on pages page 3-2 through page 3-6. The administrator clicks **Edit** to edit information on this page. Figure 3-8 shows the page in edit mode.

Figure 3-8: Supplier Representative Editor page in edit mode

Supplier Representative Editor

Save Save & Close Cancel

Company Information **Contact Information** **Status/Actions**

Next Action

Deactivate This action will deactivate the registered user and disable them from logging into the Vendor Portal

Current Status

Registration Date: 5/8/2006 2:51 PM
Current Status: Approved

Event History

Event	User	Time
Approved	John Smith	5/10/2006 6:14 PM
Added Company - ABC Company	John Smith	11/29/2007 10:17 AM
Added Company - ABC Foods	John Smith	11/29/2007 10:17 AM

To deactivate a registrant, the administrator clicks **Deactivate**, then **Save**. A deactivated user can no longer access Supplier Portal and will not be visible on the Approved Registrations page. The registrant will be visible on the Deactivated Registrations page.

Managing Rejected Registrations

The Rejected Registrations page displays all of the registrants who have been rejected access to Supplier Portal, as figure 3-9 shows below:

Figure 3-9: Rejected Registrations page

Rejected Registrations	
<u>Sandra Simmons - ssimmons</u> 56783 Commerce Blvd Tower 12 Anytown California, 88888 123-234-2342 574-234-2342 International Shipping www.iship.com 56783 Commerce Blvd Tower 12 Anytown California, 88888 USA 123-234-2342	<u>John Anderson - janderson</u> 6532 Business Ave Suite 320 Anytown Texas, 76422 USA 222-222-2222 555-555-5555 Dairy's Best www.dairysbest.com 6532 Business Ave Suite 320 Anytown Texas, 76422 USA 222-222-2222

The administrator clicks on the first and last name link to view more information about the registrant. The Supplier Representative Editor page displays, as described on pages page 3-2 through page 3-6. The administrator clicks **Edit** to edit information on this page, as shown in figure 3-10 below:

Figure 3-10: Supplier Representative Editor page in edit mode

Supplier Representative Editor

Next Action

This action will approve the submitted application and enable the user to log into the Vendor Portal

Current Status

Registration Date: 8/31/2006 4:32 PM
Current Status: Rejected

Event History

Event	User	Time
Rejected	John Smith	9/6/2007 4:08 PM

To activate the rejected registrant, the administrator clicks **Approve**, and then **Save**. Once approved, the registrant will be able to access the Supplier Portal site. The registrant will no longer be visible on the Rejected Registrations page and will be visible on the Approved Registrations page.

Managing Deactivated Registrations

The Deactivated Registrations page displays all of the registrants that have been deactivated. Deactivated registrants are users that do not have access to Supplier Portal. Deactivated registrants were active users at one time. Figure 3-11 shows the Deactivated Registrations page.

Figure 3-11: Deactivated Registrations page

Deactivated Registrations

Mike Smith - smith

1221 Fast Ln
Dallas TX, 11111
USA
111.111.1111
222.222.2222

ABC Foods
www.abcfoods.com
1221 Fast Ln
Dallas TX, 11111
USA
111.111.1111
222.222.2222

The administrator clicks on first and last name link to obtain more information about the registrant. The Supplier Representative Editor page displays, as described on pages page 3-2 through page 3-6. The administrator clicks **Edit** to edit information on these tabs, as shown in figure 3-12 below:

Figure 3-12: Supplier Representative Editor page in edit mode

Save Save & Close Cancel

Supplier Representative Editor

Company Information Contact Information **Status/Actions**

Next Action

Reactivate This action will reactivate the registered user and enable them to log into the Vendor Portal

Current Status

Registration Date: 5/17/2007 3:29 PM
Current Status: Deactivated

Event History

Event	User	Time
Approved	John Smith	5/17/2007 3:32 PM
Added Company - ABC Foods	John Smith	5/17/2007 9:23 PM
Deactivated	John Smith	9/13/2007 10:26 AM
Reactivated	John Smith	9/13/2007 10:26 AM
Deactivated	John Smith	9/13/2007 10:26 AM

To activate the user, the administrator clicks **Reactivate**, then **Save**. Once reactivated, a user will be able to access the Supplier Portal site. The user will no longer be visible on the Rejected Registrations page and will be visible on the Approved Registrations page.

Access Control and Visibility

The visibility and access control of information in the Supplier Portal is managed at several levels.

Controlling Access

As described earlier in this chapter, a registrant must have an approved user name and a password to access Supplier Portal. In addition, the registrant can only see information about companies or facilities that he or she has been associated with by the Supplier Portal administrator. The registrant can not access information related to other partners and suppliers.

Controlling Visibility

Users working in Global Specification Management (GSM) and Supply Chain Relationship Management (SCRM) have the ability to control the information that the approved registrant can view in Supplier Portal. For GSM specifications to be visible to the supplier, the following criteria have to be met:

- The GSM specification must be in a workflow step on which the System Action is set to “Publish to Supplier” and
- The sourcing approval for that specification must be in a workflow step on which the System Action is set to “Publish to Supplier”

If either of the two conditions is not true, the specification will not be visible on the Supplier Portal.

For more information on GSM workflow steps, refer to *Agile Product Lifecycle Management for Process Administrator User Guide*.

Users can also share % Breakdown (formulation) information in GSM specifications with suppliers. This access is controlled from specifications in GSM. See the *Agile Product Lifecycle Management for Process Global Specification Management User Guide* for more details.

Supplier company contacts and facility contacts will be visible in Supplier Portal only if the **Publish to Supplier Portal** field is selected in SCRM. Documents attached to supplier company and facility will be visible in Supplier Portal only if the **Publish to Supplier Portal** field is selected in SCRM. See the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide* for more details.

