

**Oracle® Agile Product Lifecycle Management for  
Process**

Supplier Portal User Guide

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# Preface

The *Agile Product Lifecycle Management for Process Supplier Portal User Guide* explains how 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. It also describes how administrators use the Supplier Portal Administration (SPA) application to manage Supplier Portal registrations.

This preface contains these topics:

- [Audience](#)
- [Variability of Installations](#)
- [Documentation Accessibility](#)
- [Software Availability](#)
- [Related Documents](#)
- [Conventions](#)

## Audience

This guide is intended for end users who are responsible for creating and managing information in Agile PLM 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

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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## Software Availability

Oracle Software Delivery Cloud (OSDC) provides the latest copy of the core software. Note the core software does not include all patches and hot fixes. Access OSDC at: <http://edelivery.oracle.com>.

## Related Documents

For more information, see the following documents in the Agile PLM for Process documentation set:

- *Agile Product Lifecycle Management for Process Administrator User Guide*
- *Agile Product Lifecycle Management for Process Global Specification Management User Guide*
- *Agile Product Lifecycle Management for Process eQuestionnaire User Guide*
- *Agile Product Lifecycle Management for Process Document Reference Library User Guide*
- *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide*
- *Agile Product Lifecycle Management for Process Release Notes*. Up-to-date Release Notes and other documentation are posted on Oracle Technology Network (OTN) at this location:

<http://www.oracle.com/technetwork/documentation/agile-085940.html#plmprocess>



# Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.



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# Introducing Supplier Portal

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 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, as explained in [Chapter 3, "Working with Specifications and Documents"](#)
- Obtain guidance surrounding expectations of deliverables in the form of catalogs of documents from a managed library, as explained in [Chapter 5, "Using Document Reference Library"](#)
- Manage contact data for personnel at their facilities, as explained in [Chapter 6, "Managing Contacts"](#)
- View selected documentation related to suppliers' facilities, compliance, contracts, and specifications, as described in [Chapter 3, "Working with Specifications and Documents"](#)
- Approve or reject a specification, as described in [Chapter 3, "Working with Specifications and Documents"](#)
- Initiate questionnaires for specifications, as described in [Chapter 3, "Working with Specifications and Documents"](#)
- Participate in the quality management process using the supplier PQM module, as described in [Chapter 4, "Quality Management"](#)

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 explained in Chapters 1 through 8, 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 9, "Using Supplier Portal Administration"](#) for this information.

## Supplier Portal Administration Overview

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

Refer to [Chapter 9, "Using Supplier Portal Administration"](#) for more information on an administrator's use of Supplier Portal Administration.

For general information on using Agile PLM 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 ["Viewing Specifications"](#) on page 2-10 and ["Supplier Actions"](#) on page 2-14, 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 ["Viewing Supplier and Facility Documents"](#) on page 2-18 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 9-4 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 ["Viewing Document Reference Library"](#) on page 2-21 for more information, or see the *Agile Product Lifecycle Management for Process Document Reference Library User Guide*.

### eQuestionnaire

Suppliers can initiate questionnaires from Supplier Portal. Refer to the *Agile Product Lifecycle Management for Process eQuestionnaire User Guide* for more information on the eQuestionnaire (eQ) application.

**Product Quality Management**

Suppliers use Supplier Portal to access Supplier Product Quality Management (Supplier PQM). Supplier PQM allows suppliers to participate in the quality management process. See the [Chapter 4, "Quality Management"](#) for more information.



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## Accessing Supplier Portal

This chapter describes how a company's suppliers access Supplier Portal. It includes the following topic:

- [Accessing Supplier Portal—Registrants](#)

### Accessing Supplier Portal—Registrants

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

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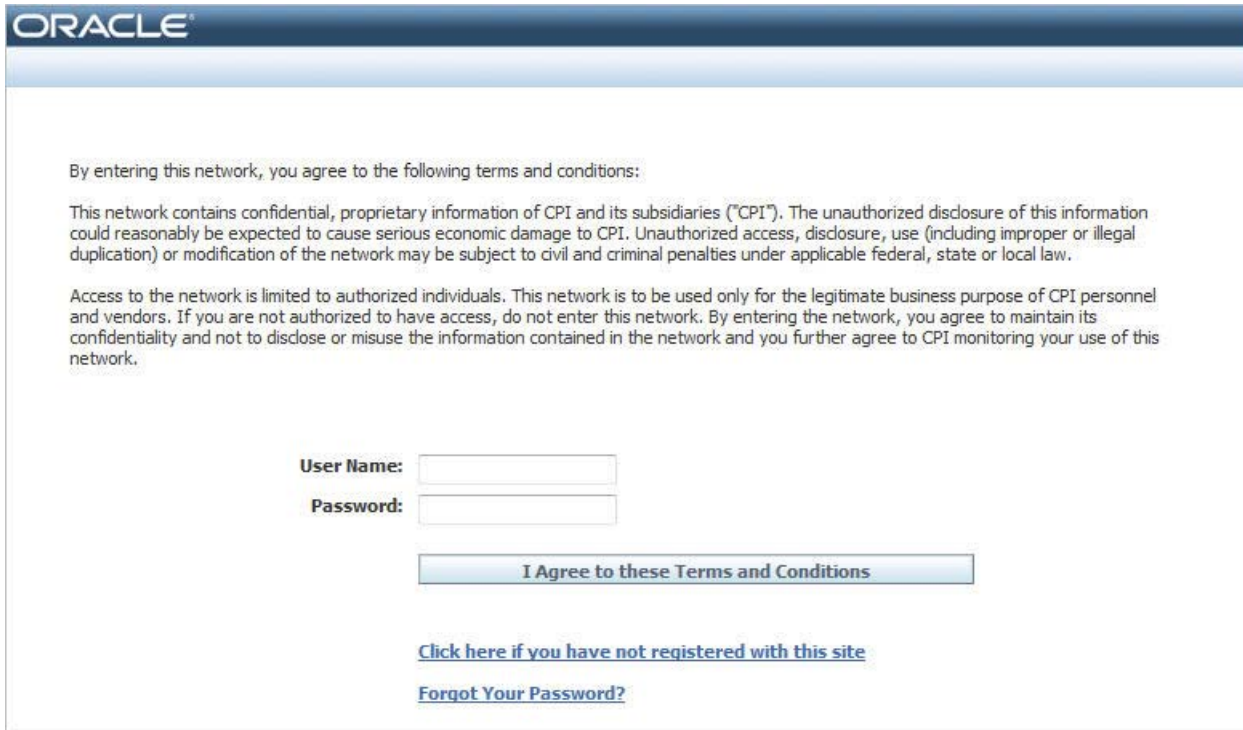
When the supplier accesses the Supplier Portal site, the Welcome page is displayed, as shown in [Figure 2-1](#).

**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



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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.

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**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. The user name can be changed by the Supplier Portal Administrator.

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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 screenshot displays a form titled "Company Information page". It contains the following fields and labels:

- Company Name:
- Company Web Site:
- Street Address 1:
- Street Address 2:
- City:
- State/Province:
- Postal Code:
- Country:  (dropdown menu)
- Phone:
- Fax:

Below the form fields is a large blue arrow pointing to the right, indicating the next step in the process.

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:

**Figure 2–4** *Contact Information page*

**ORACLE®** Contact Information

First Name:

Last Name:

Email:

Street Address 1:

[use company address](#)

Street Address 2:

City:

State/Province:

Postal Code:

Country:

Phone:


Fax:

◀ ▶

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](#).

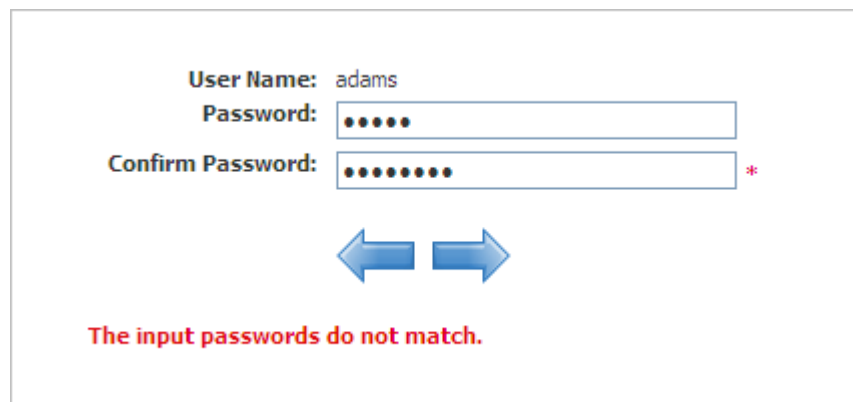
**Figure 2–5 Username & Password page**

The screenshot shows a registration form with three fields: "User Name:" with the value "adams", "Password:" with an empty text box, and "Confirm Password:" with an empty text box. Below the fields are two blue arrows, one pointing left and one pointing right, indicating navigation options.

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](#).

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 (  ).

**Figure 2–6 Error message**


The screenshot shows the same registration form as Figure 2–5, but with the "Password:" field containing five dots and the "Confirm Password:" field containing eight dots. A red asterisk is visible to the right of the "Confirm Password:" field. Below the fields are two blue arrows, one pointing left and one pointing right. At the bottom of the form, the text "The input passwords do not match." is displayed in red.

The Registration Summary 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 Registration Summary page**

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.

<b>Company Name:</b>	Global Foods	<b>First Name:</b>	Sarah
<b>Company Web Site:</b>	www.globalfoods.com	<b>Last Name:</b>	Adams
<b>Street Address 1:</b>	100 Main Street	<b>Email:</b>	sarahadams@globalfoods.com
<b>Street Address 2:</b>	Suite 100	<b>Street Address 1:</b>	100 Main Street
<b>City:</b>	Dallas	<b>Street Address 2:</b>	Suite 100
<b>State/Province:</b>	TX	<b>City:</b>	Dallas
<b>Postal Code:</b>	55555	<b>State/Province:</b>	TX
<b>Country:</b>	USA	<b>Postal Code:</b>	55555
<b>Phone:</b>	555-111-2222	<b>Country:</b>	USA
<b>Fax:</b>	555-222-3333	<b>Phone:</b>	555-111-2222
		<b>Fax:</b>	555-222-3333

 **Submit**

When the supplier clicks **Submit**, the request is sent to the Supplier Portal Administration (SPA) application. The Thank You confirmation page, shown in [Figure 2–8](#), 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**

Thank you for registering with the CPI Vendor Portal Quality Program website. Your application will be reviewed for inclusion. If accepted, you will be notified electronically.

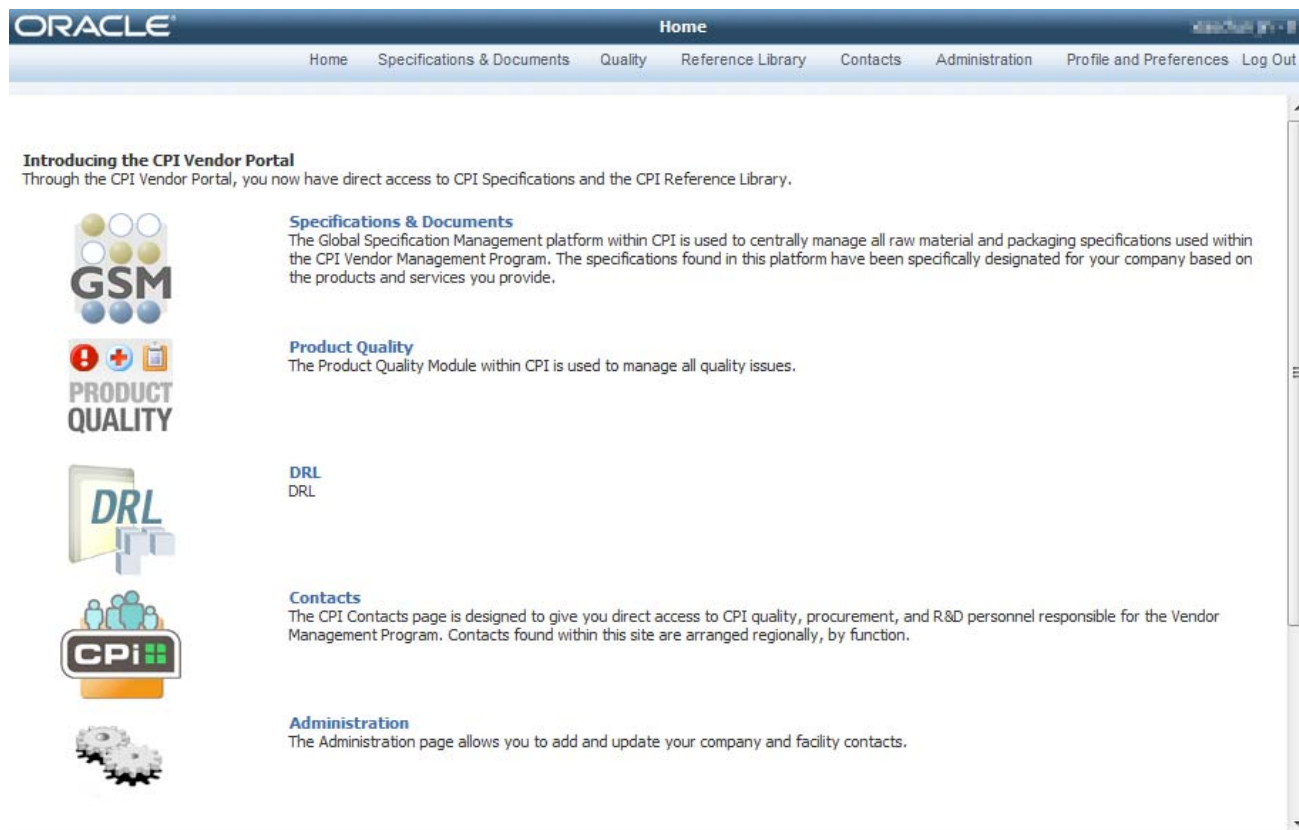
The administrator accesses Supplier Portal Administration (SPA) and views the registration request. The administrator can either grant or deny the request from the supplier. When the administrator approves the request from the supplier, the supplier will receive an email confirming that the request has been granted. The administrator will also associate the appropriate companies and facilities to the supplier, as this will determine the specification, contact information, and Product Quality issues, actions, and audits the supplier will see in Supplier Portal. Refer to [Chapter 9, "Using Supplier Portal Administration"](#) 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 material, product, packaging material, printed packaging, trade, and equipment specifications
- View public documents attached to these specifications
- View related specifications
- View sourcing approvals
- View public documents attached to the sourcing approvals
- Approve specifications by sending an electronic signature
- Submit changes to specifications by creating and sending a supplier-initiated questionnaire
- Participate in quality management
- 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

You can log out of Supplier Portal by clicking **Log Out** in the navigation bar. Supplier Portal displays the login page with a message verifying a successful logout.



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## Working with Specifications and Documents

This chapter describes how specifications and documents are used in Supplier Portal. It includes the following topics:

- [Supported Specification Types](#)
- [Viewing Specifications](#)
- [Publishing Specifications](#)
- [Access Control and Visibility](#)
- [Supplier Actions](#)
- [Viewing Supplier and Facility Documents](#)

### Supported Specification Types

Supplier Portal supports the following specification types:

- Material
- Product
- Printed packaging
- Packaging material
- Trade
- Equipment

### Viewing Specifications

The supplier can view specification-related information by clicking **Specifications & Documents** from the Home page. The Action Items page only displays if the supplier has action items. This page contains specifications awaiting approval from the supplier, as [Figure 3-1](#) shows. The Action Item page only displays specifications where the sourcing approvals related to the specifications contain the 'Supplier Review' tag in their WFA template's step.

**Figure 3–1 Action Items tab**

Action Items Specification(s) Documents

Group By: Receiving Facilities Order By: Spec Name Refresh

Angus Facility Results Per Page 20

Spec Name	Source Company	Source Facility	Receiving Facilities	Sourcing Status	Item #	Sourcing Documentation
<a href="#">Tomato Paste - Grade A Fancy</a> (5077420-001 - Approved)	Pello Grocery Products Co	Angus Facility	Angus Facility	Review	123	

1

The listing displays the name of the specification in addition to sourcing approval information.

The Action Items and Specifications tabs include two drop-down lists used to categorize the specification listing. By default, specifications are sorted by receiving facility and then ordered by specification name inside each facility grid.

1. **Group By** — Select a choice to group the specifications by:
  - Source Company
  - Source Facility
  - Receiving Facilities
  - Status
  - -- No grouping (The supplier would select this to only use the Order By option)
2. **Order By** — Select a choice to order the specifications by:
  - Spec Name
  - Source Company
  - Source Facility
  - Status
  - Item #

The supplier clicks the **Refresh** button after making selections from the drop-down lists. Each group is paged. Select the **Results Per Page** drop-down to control how many specifications are listed in each grid. The default value is 20.

Select the numbers in the footer of the grid to see the next page of specifications. See [Figure 3–2](#).



Figure 3–2 Specification(s) tab

**Action Items** **Specification(s)** **Documents**

Select the number of specifications to view per grid. The default is 20.

Group By: Receiving Facilities Order By: Spec Name Refresh


**ABC Company** Results Per Page 20

Spec Name	Source Company	Source Facility	Receiving Facilities	Sourcing Status	Item #	Sourcing Documentation
<a href="#">2-14623-OMA</a> (5092534-001 - Approved)	ABC Company	ABC Facility	ABC Company	Draft		

**ABC Foods - Atlanta** Results Per Page 20

Spec Name	Source Company	Source Facility	Receiving Facilities	Sourcing Status	Item #	Sourcing Documentation
<a href="#">Can - 300 ml - Aluminum</a> (5083196-001 - Draft Review)	Pello Grocery Products Co	Angus Facility	ABC Foods - Atlanta	Draft		

**Angus Facility** Results Per Page 20

Spec Name	Source Company	Source Facility	Receiving Facilities	Sourcing Status	Item #	Sourcing Documentation
<a href="#">Tomato Paste - Grade A Fancy</a> (5077420-001 - Approved)	Pello Grocery Products Co	Angus Facility	Angus Facility	Review	123	

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

## Publishing Specifications

### Printing and Viewing a Specification

The supplier can print a specification. From the Action Items tab or the Specifications tab, the supplier clicks on the Spec Name link to view details about the specification in the Print dialog box, as [Figure 3–3](#) shows.

**Figure 3–3** Print dialog box

The specification you have selected includes one or more sections. Please indicate the section(s) you wish to print using the checkbox provided in the "Sections" column, then click the "Print" option. Please note that each section may contain one or more supporting documents as indicated in the "Attachments" Column. You may open/download these attachments individually by clicking on each file name.

**Documentation Format**

Print Template: Default

Print Format: US - letter

Select a checkbox to print the corresponding section

Specification Type	Sections	Attachments
Current	<input type="checkbox"/> Tomato Paste - Grade A Fancy (5077420-001)	
	<input type="checkbox"/> 5012711 - Angus Facility / Angus Facility	
	<input type="checkbox"/> Nutrient Composition	
Master	<input type="checkbox"/> mj master (5083956-001)	<a href="#">txt - special characters.txt</a>
	<input type="checkbox"/> Supporting Documentation	<a href="#">jpg - valley.jpg</a>
	<input type="checkbox"/> Custom Section - Flavors	

### Default Print Settings

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 and the associated sourcing approval attached to the specification. Only the sourcing approval that is tied to the supplier registrant will be accessible. The sourcing approval print includes:

- Company Name
- Sourcing Facility Name
- Receiving Facilities grid
- Sourcing Type
- Supplier Item #
- Supplier Signed Info
- Protocol ID
- Class
- Notes
- Cross References grid
- All Custom Data (Extended Attributes and Custom Sections)
- Sourcing Approval Status

---

**Note:** Attachments and SDM will not be included in the print out.

---

## Printing Specifications

The supplier selects the **Default** option or a custom template from the Print Template drop-down list. For more information around how to add custom print templates, refer to the *Agile Product Lifecycle Management for Process Print Extensibility Guide*.

The supplier selects one of the following options from the Print Format drop-down list:

**US - letter** —Standard U.S. 8x11 inch paper (default)

**Europe - A4** — Standard international A4 sized paper

Once the supplier has made selections, clicking **Print** generates a document with the selected information from the Print dialog box. The supplier can then print the file as needed.

## 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 Tag is set to "Publish to Supplier Portal" and
- The sourcing approval for that specification must be in a workflow step on which the Tag is set to "Publish to Supplier Portal"

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

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

The following objects' visibility can be controlled through tags set in GSM:

- Attachments
- %Breakdowns
- Shelf Life
- Custom Sections
- Extended Attributes

See the *Agile Product Lifecycle Management for Process Global Specification Management User Guide* for more details.

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**Note:** The material specification's substitutes grid is not available to the supplier.

---

---

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.


## Notifying the Supplier

The supplier can be notified when the specification is published to the Supplier Portal. When the tag of "Send Notification to Sourcing Supplier" is added to the sourcing approval's WFA step, an email will be sent to the supplier when the sourcing approval transitions. See the WFA chapter of the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information.

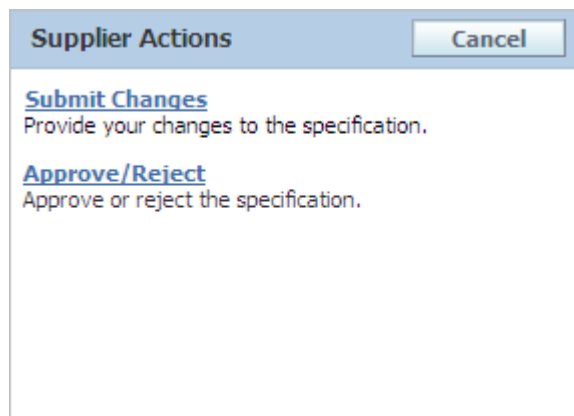
## Supplier Actions

Suppliers can use Supplier Portal to approve specifications and initiate changes to a specification.

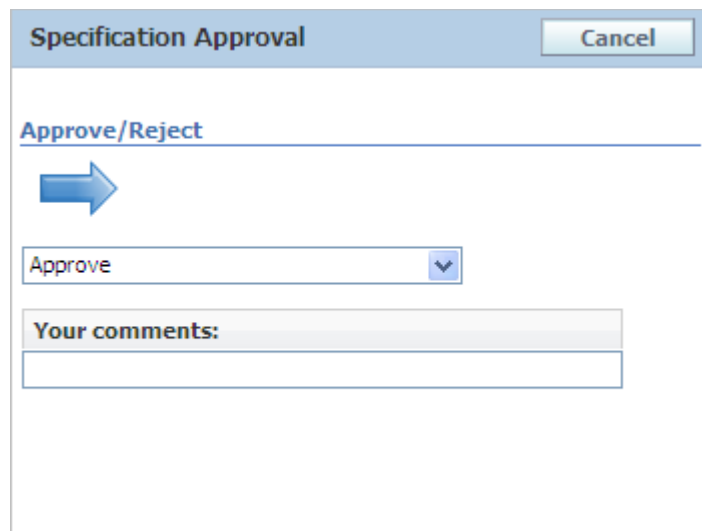
## Approving Specifications

Suppliers can view the specification by clicking the hyperlinked **Spec Name** field, as described in "Printing and Viewing a Specification" on page 3-4. Suppliers can take action on a specification, providing an electronic signature, by clicking the supplier actions icon (  ). The Suppliers Action dialog box displays, as [Figure 3-4](#) shows.

**Figure 3-4** Supplier Actions dialog box



Suppliers can approve or reject a specification by selecting the **Approve/Reject** link. When the Approve/Reject link is selected, the Supplier Actions dialog box closes and the Specification Approval dialog box displays, as [Figure 3-5](#) shows.

**Figure 3–5** Specification Approval dialog box


The dialog box is titled "Specification Approval" and has a "Cancel" button in the top right corner. Below the title bar, there is a section header "Approve/Reject" followed by a blue right-pointing arrow icon. Underneath the icon is a drop-down menu currently showing "Approve". Below the drop-down menu is a text area labeled "Your comments:".

The supplier enters any comments related to the approval or rejection of the specification in the Your Comments field (required), and then chooses from the options in the drop-down field. These options may vary based on your configuration. A simple example would be the following options:


**Approve** — Approves the specification

**Reject** — Rejects the specification

---

**Note:** The name of these options are based on the WFA template step names that contain the tags 'supplier approved' and 'supplier rejected.' Refer to the *Agile Product Lifecycle Management for Process Administrator User Guide* for more information.

---

The supplier clicks the move step forward icon (  ) to submit the approval or rejection. The specification no longer appears in the Action Items list. Based on the supplier action, the associated sourcing approval will be advanced in its workflow to the specified approved/rejected status. The supplier's comments and action will be captured on the sourcing approval's audit trail tab. If the supplier approved the specification, the sourcing approval's Supplier Signed Spec field will be checked and dated, and comments will be captured.

## Sourcing Approval Owner Notification

When the supplier submits accept/reject, the owners of the sourcing approval will be notified by email informing them of the supplier's actions. (If the owner is a group then all users of that group will be emailed.) The email is configurable and includes the following variables:

- |   |                                  |                              |
|---|----------------------------------|------------------------------|
| ■ <Approver First Name>                           | ■ <Approver Last Name>           | ■ <Approved/Rejected Action> |
| ■ <specification Number>                          | ■ <specification version number> | ■ <Specification Name>       |
| ■ <cross reference system name-equivalent number> | ■ <Date Stamp>                   | ■ < Time Stamp>              |
| ■ <approver comments>                             |                                  |                              |

---

**Note:** Emails are not sent until a workflow transition occurs.

---

**Sample Email** A sample email follows:

```
SUBJECT:
<Approved/Rejected Action>: <Specification
Name>(<specification Number>-<specification version
number>, <cross reference system name-equivalent number>)
MESSAGE:
<Approver Supplier First Name><Approver Last Name>
<Approved/Rejected> the specification <Specification
Name>(<specification Number>-<specification version
number>, <cross reference system name-equivalent number>)
on <Date Stamp> at <Time Stamp>. They included the
following comments:
<comments>
Sample:
REJECTED: Chicken Nuggets (50001232-001, SAP -
1254516-02341, ORC - 00034503.)
John Supplier rejected the specification Chicken Nuggets
(50001232-001, SAP - 1254516-02341, ORC - 00034503.) an May
5, 2008 at 3:42pm. They included the following comments:
The peanut allergen is missing from the specification.
```

## Access Control and Visibility


For the supplier to provide an electronic signature, the following conditions must be met:

- The sourcing approval must be in a status with the "Supplier Review" tag. The sourcing approval workflow template must contain the appropriate supplier approved and supplier rejected tagged statuses.
- Registrants receiving the email that the specification is ready for review must have a valid email address.

- The specification and sourcing approval status must contain the "Publish to Supplier Portal" tag.

For more information on workflow templates, refer to the "Using WFA to Manage SCRM Workflows" chapter in the *Agile Product Lifecycle Management for Process Administrator User Guide*.

## Initiating a Questionnaire for a Specification

From the Action Items and/or Specifications tab(s), the supplier can initiate a questionnaire for the associated specification. The supplier clicks on the supplier action icon (  ). In the Supplier Actions dialog box, shown in [Figure 3-4](#), on page 3-6, the supplier clicks on **Submit Changes**.

When the **Submit Changes** button is selected, a new questionnaire is created, and the eQuestionnaire Welcome page is displayed. The supplier can now login to eQ and fill out the questionnaire. For more information, refer to the *Agile Product Lifecycle Management for Process eQuestionnaire User Guide*. At the same time, an email is sent to the supplier who initiated the questionnaire. This content of this email is configurable. This email contains a link to the questionnaire just created.

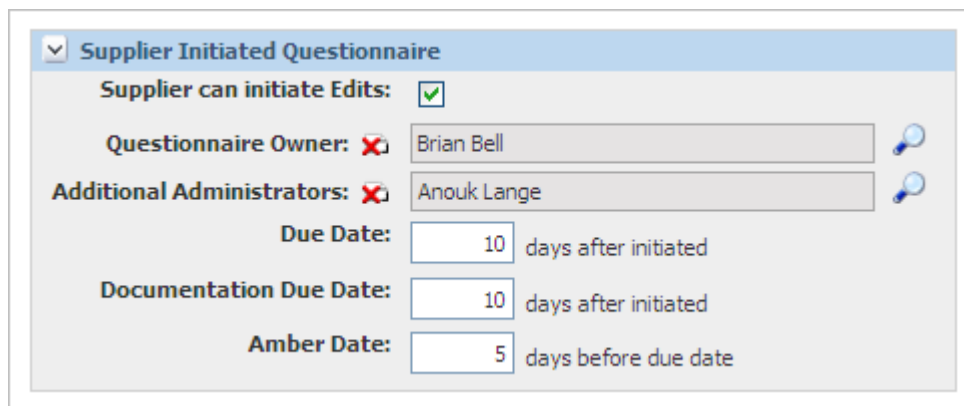
For more information, on questionnaires, refer to the *Agile Product Lifecycle Management for Process eQuestionnaire User Guide*. Refer to the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide* for more information on sourcing approvals.

## Access Control and Visibility

For the supplier to initiate a questionnaire, the following conditions must be met:



- The eQuestionnaire (eQ) application is installed.
- Supplier-initiated questionnaires must be configured on.
- The specification and sourcing approval status must contain the "Publish to Supplier Portal" tag.
- An eQ template needs to be created for each specification type.
- The "Supplier can initiate Edits" field is checked on the sourcing approval, as [Figure 3-6](#) shows.



**Figure 3-6 SCRM, sourcing approval**



☒ **Supplier Initiated Questionnaire**

**Supplier can initiate Edits:** ☒

**Questionnaire Owner:**  Brian Bell 

**Additional Administrators:**  Anouk Lange 

**Due Date:**  days after initiated

**Documentation Due Date:**  days after initiated

**Amber Date:**  days before due date

Refer to the *Agile Product Lifecycle Management for Process eQuestionnaire User Guide* for more information.


## Viewing 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 be marked as "Publish to Supplier Portal" in SCRM to be displayed.

Figure 3–7 shows documents attached to the supplier company and facilities.

**Figure 3–7 Specifications & Documents page, Documents tab**



Figure 3–7 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.



---

## Quality Management

This chapter describes how a supplier uses the supplier PQM module. It includes the following topics:

- [Overview](#)
- [Visibility and Access](#)

### Overview

Suppliers can participate in the quality management process using the supplier PQM module. Supplier access is determined by their registrant profile inside supplier portal administration. Suppliers can be allowed to participate as little or as much as you prefer during the quality management process. For example, suppliers can be given rights to read quality issues that relate to them, edit and workflow supplier corrective actions involving them and create/submit audit results. Trusted suppliers can even be allowed to create issues and actions.

### Visibility and Access

Supplier PQM users are treated the same as internal users. For example, the supplier needs to be added to the permissions grid to be given read/write access, and the workflow permissions grid to be given workflow permission. See the functionality of Supplier token in the "Using WFA to Manage PQM Workflows" chapter in the *Agile Product Lifecycle for Process Administrator User Guide* and "[Group Membership](#)" on page 9-7 in this guide for more information. Suppliers need the proper UGM roles to create objects. However, there are a few additional requirements and exceptions for supplier users.

1. Suppliers will only be able to see PQM objects when the following conditions are true:
  - The Issue, Action or Audit is associated to their company or facility in the Suppliers/Facilities grid
  - The Issue, Action or Audit must be in a workflow step on which the tag is set to "Publish to Supplier Portal"

---

---

**Note:** If a supplier is allowed to create quality objects remember that the "Publish to Supplier Portal" tag needs to be in the first step of the workflow used. It is recommended that suppliers are only allowed to create items from templates. The templates available to the supplier should be created specifically for the supplier and include the "Publish to Supplier Portal" tag in the first step.

---

---

2. Supplier users are only allowed to associate PQM objects to specifications, companies, and facilities that have been associated to them.

---

---

**Note:** If a published PQM object has been associated to a specification, company, or facility the supplier is not associated to, then the supplier will still see those rows in the Affected Items and Suppliers/Facilities grids. However, objects listed in the Affected Items and Suppliers/Facilities grids will not be linked. Suppliers are never allowed to access GSM or SCRM objects from Supplier PQM. They can only read GSM and SCRM objects through the Specification and Documents section in Supplier Portal.

---

---

3. Depending on your configuration, the following fields may be hidden to the supplier: Product Lines, Customers, and Associated Project.
4. Custom data that contains the "Do Not Publish to Supplier" tag will not be shown to supplier users.

See the *Agile Product Lifecycle Management for Process Product Quality Management User Guide* for more information around general PQM functionality.

---

## Using Document Reference Library

This chapter describes how Document Reference Library (DRL) ties into Supplier Portal. It includes the following topics:

- [Viewing Document Reference Library](#)

### Viewing Document Reference Library

This page shows Document Reference Library (DRL) catalogs and documents available to the supplier. This visibility is set up in SCRM on the company and/or facility DRL Catalog tab. Suppliers can also be directly associated on the Access tab of their registrant profile. 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's company, facility, or registrant profile, 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 5-1](#) displays the Reference Library page.

**Figure 5-1** *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 5-2](#).

**Figure 5–2 DRL document detail**

<b>Document Name:</b> New Grounds		
<b>Document Number:</b> 0000744-001		
<b>Attachments</b>		
Title	File Name	File Size
<a href="#">ppt</a>	2007-Jan-CustomerRoadmap-Draft-v7.ppt	363520k
<a href="#">valley</a>	valley.jpg	396509k

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.

## Managing Contacts

This chapter describes how to manage contacts in Supplier Portal. It includes the following topic:

- [Displaying Your Company and Facility Contacts to a Supplier](#)

### Displaying Your Company and Facility Contacts to a Supplier

Clicking the **Contacts** link from the Home page displays the Contacts page shown in [Figure 6–1](#). This page displays all facilities tied to a business unit.

---

**Note:** The Contact link displays on the Home page only if it is configured on. For more information on this feature, refer to the BUFacilitySearchPattern configuration key described in the *Agile Product Lifecycle Management for Process Configuration Guide*.

---

Select a business unit from the drop-down list and click **Search**. All facilities within that business unit are displayed.

**Figure 6–1** *Contacts page*

Facility #	Facility Name	Company Name	City	State/Province	Country
5011701	<a href="#">ABC Foods - Atlanta</a>	ABC Foods	Atlanta	GA	USA
5012313	<a href="#">ABC Company</a>	ABC Company	Dallas	Florida	USA
5011205	<a href="#">ABC Facility</a>	ABC Pizza Company	Dallas	TX	USA
5010719	<a href="#">Angus Facility</a>	Pello Grocery Products Co			USA

Select a facility from the Facility Name column. Supplier Portal displays the Facility Information dialog box shown in [Figure 6–2](#).

**Figure 6–2 Facility Information dialog box**

Facility Information				
<b>Facility Information</b>				
Company Name:	<a href="#">ABC Company</a>			
Facility #:	5012313			
Facility Name:	ABC Company			
Street Address 1:	123 Main			
Street Address 2:				
City:	Dallas			
State/Province:	Florida			
Postal Code:	75555			
Country:	USA			
Website:				
<b>Facility Contacts</b>				
Contact Name	Category	Phone	Fax	Email
<a href="#">John Jacobs</a>	Business Contact, R&D, Order, eQ, Plant QA, Corporate QA	224-343-1234		<a href="mailto:test@abcfoods.com">test@abcfoods.com</a>
<b>Company Contacts</b>				
Contact Name	Category	Phone	Fax	Email
<a href="#">Tom Johnson</a>	Business Contact	872-333-4444		<a href="mailto:tom@abcfoods.com">tom@abcfoods.com</a>
<a href="#">Bob Newhart</a>	Contact Category, Sales/Service, Corporate QA	872-333-5555		<a href="mailto:bob.newhart@abcfoods.com">bob.newhart@abcfoods.com</a>

This page displays contact information for the facility as defined in SCRM. Click the linked company name to display the Company Information dialog box shown in Figure 6–3.

**Figure 6–3 Company Information dialog box**

Company Information	
Company #:	5011204
Company Name:	ABC Company
Street Address 1:	123 Main
Street Address 2:	
City:	Dallas
State/Province:	Texas
Postal Code:	75555
Country:	USA
Website:	

Contacts for the facility and the facility's parent company are displayed in the Facility Contacts and Company Contacts sections. Click on any contact name to view contact information in the Contact Information dialog box, shown in Figure 6–4.

---

**Note:** Contacts have to be flagged as “Publish to Supplier Portal” in SCRM to be listed here.

---

Figure 6-4 Contact Information dialog box

Contact Information

First Name:

Tom

Last Name:

Johnson

Category:

Business Contact

Job Title:

CEO

Phone:

972-555-9876

Mobile/Pager:

972-555-3333

Fax:

Email:

tom@abcfoods.com

Street Address 1:

123 Main

Street Address 2:

City:

Dallas

State/Province:

Texas

Postal Code:

75555

Country:

USA

Emergency Contact:

☒





---

## Administering Supplier Portal

This chapter presents an administering supplier contacts in Supplier Portal. This chapter includes the following topic:

- [Managing Supplier Contact Information](#)

### Managing Supplier 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.

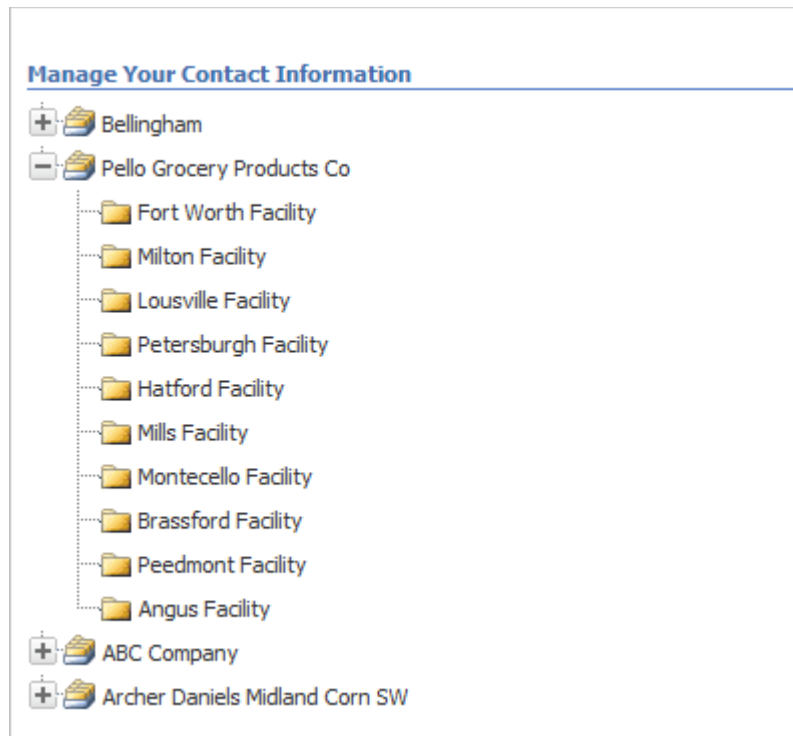
The manage contact feature enables suppliers to manage their contact information and keep it accurate on an ongoing basis.

Clicking the **Administration** link displays the Administration page shown in [Figure 7-1](#).

---

**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 7–1 Administration page, Manage 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 [Chapter 9, "Using Supplier Portal Administration"](#) 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 7–2](#) shows the summary page for the selected company or facility.

**Figure 7–2 Summary page for selected company or facility**

**Company / Facility Info**

**Name:** Archer Daniels Midland Corn SW

**Street Address 1:** P.O. Box 1470

**Street Address 2:**

**City:** Decatur

**State/Province:** IL

**Postal Code:** 62525

**Country:** USA

**Website:**

**Phone:**

**Fax:**

**Postal Address:**

**City:**

**State/Province:**

**Postal Code:**

**Country:**

**Contacts**

Name	Title	Category	Phone	Mobile/Pager	Email	
<a href="#">Sarah Smith</a>					<a href="#">sarah.smith@scrm.com</a>	✖
1						

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 7–3](#). 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 7–3](#).

**Figure 7–3 Contact Information page with contact information populated automatically**

**Edit User Profile** [Save] [Save & Close] [Cancel]

**Contact Information**

**First Name:** Jan

**Last Name:** Smith

**Contact Category:** Corporate QA, Plant QA, R&D

**Job Title:** QA Director

**Phone:** 555-111-3333

**Mobile/Pager:** 555-222-4444

**Fax:** 555-222-5555

**Email:** Jsmith@piercefoods.com

**Street Address:** 12313 Avenue A [« Import](#) **Click here to display available addresses**

**City:** Withita

**State/Province:** CA

**Postal Code:** 93627

**Countries:** USA

**Emergency Contact:** ☒

**Emergency Phone:** 555-444-2222

**Additional Notes**

**Description:** Jan's the new manager

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 7–4](#). The dialog box displays addresses that are associated with this supplier. The supplier can click one of the addresses to use that address.

**Figure 7–4 Contact addresses**

**« Import** [Cancel]

[Fort Worth Facility](#)  
[Fort Worth, TX USA](#)

[Pello Grocery Products Co](#)  
[12313 Avenue A](#)  
[Withita, CA 93627](#)  
[USA](#)

---

## Defining Profiles and Preferences

This chapter explains how to define profiles and preferences for Supplier Portal. This chapter includes the following topic:

- [Defining your Profile and Preferences](#)

### Defining your Profile and Preferences

This chapter explains how to use Profile and Preferences to edit and view your settings for Supplier Portal. This chapter contains the following topics:

- [Preferences Tab](#)
- [Basic Information Tab](#)

Use Profile and Preferences to edit and view your settings that span select applications. In the user preferences dialog box, you update your basic information and set your preferences for Supplier Portal. To access this dialog box, click **Profile and Preferences** on the top menu. The user preferences dialog box displays, as shown in [Figure 8-1](#).

**Figure 8–1 User Preferences dialog box, Preferences tab**

**Save & Close** **Cancel**

**Preferences** **Basic Information**

**Warning**  
Some of your preferences are using configured defaults, you need to save your profile and preferences to persist these values.

**Settings**

**UI Language:** English (United States) ▼

**Free Text Language:** ENGLISH ▼

**System Code (PQM):**

[Change Password](#)

[Manage Passphrase](#)

**Results Per Page**

**Action Items:** 10 ▼

**Search Result:** 10 ▼

## Preferences Tab

The Preferences tab consists of three sections: Settings, Results Per Page, Cost Preferences, and Formulation Preferences.

### Settings Section

The Settings section contains language settings and key default values.

- **UI Language** — Denotes your preferred user interface (UI) language and culture.
- **Free Text Language** — Denotes your preferred language for data you enter into the system. This language must be the same language selected for your UI language.
- **System Code (PQM)** — Designates which cross references system equivalent to use for searching. This field will be the equivalent number that displays in the PQM search results and certain related item grids..
- **Change Password**—Allows you to manage your password used to log into Supplier Portal.

To change your password:

1. Click **Change Password**. A Change User Password dialog box opens.
2. Type your **Old Password** and type your new password in the **New Password** and **Confirm Password** fields.
3. Click **Submit**. The new password takes effect after you have saved the revised user profile.

- **Manage Passphrase**—Displayed when the logged in user has been set up to have eSignature enabled in Supplier Portal Administration (SPA). When a user needs to establish a new passphrase or manage an existing passphrase upon logging in to Profile and Preferences, one of the following messages displays:

"Your passphrase has expired, please update your passphrase."

"Your passphrase has not been established, please setup your passphrase."

To manage your passphrase:

1. Click **Manage Passphrase**. A Manage Password dialog box opens.
2. Type your **Old Passphrase** and type your new passphrase in the **New Passphrase** and **Confirm Passphrase** fields.
3. Click **Submit**. The new passphrase takes effect after you have saved the revised user profile.

### Results Per Page Section

The Results Per Page section contains settings for Supplier PQM action items and search results.

- **Action Items** — Sets the default number of action items displayed in Supplier PQM.
- **Search Results** — Sets the default number of search results displayed in Supplier PQM.

## Basic Information Tab

The Basic Information tab contains contact information, as shown in [Figure 8–2](#).

**Figure 8–2 Basic Information tab**

The screenshot shows a web interface for updating a user profile. At the top right are 'Save & Close' and 'Cancel' buttons. Below them are two tabs: 'Preferences' and 'Basic Information', with the latter being selected. The 'Basic Information' section contains the following fields:

First Name:	Jones
Last Name:	Kelly
Business Phone:	555-111-2222
Fax:	555-222-3333
Email:	kjones@abccompany.com
Street Address:	100 Main Street
	Suite A
City:	Dallas
State/Province:	TX
Postal Code:	55555
Country:	USA

### Basic Information

You can update your contact information using the fields below:

- |                      |             |                  |
|----------------------|-------------|------------------|
| ■ First Name         | ■ Last Name | ■ Business Phone |
| ■ Fax                | ■ Email     | ■ Street Address |
| ■ Street Address (2) | ■ City      | ■ State/Province |
| ■ Postal Code        | ■ Country   |                  |



---

## 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](#)

### 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 Supplier Portal registrations, as [Figure 9–1](#) shows:

**Figure 9–1** *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 9–2](#).

**Figure 9–2** *New Registrations page*



Name	Company	Login	Registered
<a href="#">Adams, Sarah</a>	Global Foods	sadams	5/31/2011 10:45:00 AM
<a href="#">Smith, Sam</a>	XYZ	ssmith	8/31/2010 4:06:45 PM
<a href="#">Clark, Madge</a>		mclark	5/13/2009 12:33:02 PM

## Supplier Representative Editor Page

Clicking the hypertext name link located in the gray shaded area displays the registration request on the Supplier Portal Registrant page, as shown in [Figure 9–3](#).

Figure 9-3 Supplier Portal Registrant page



**Joseph Foodscientist (Oracle, Inc.)**  
 Supplier Portal Registrant

New

Company Information
 Contact Information
 Access
 Status/Actions

Company Information

**Company Name:** Oracle, Inc.  
**Website:** oracle.com  
**Street Address 1:** 123 Elm Street  
**Street Address 2:**  
**City:** San Francisco  
**State/Province:** CA  
**Postal Code:** 94212  
**Country:** USA  
**Phone:** 555-222-3333  
**Fax:** 555-123-4321

Associated Companies

Company #	Company Name
5011204	ABC Company

Associated Facilities

Facility #	Facility Name	Company Name
5011701	ABC Foods - Atlanta	ABC Foods

Tags

Type	Tags
Print Template	Default

The administrator uses the four 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 9-4](#).

### Tags

Tags are used to associate a supplier to custom print templates. They can also be used to control supplier portal extension points. For more information around custom print templates refer to the *Agile Product Lifecycle Management for Process Print Extensibility Guide*.

Figure 9-4 Company Information tab with associated company and facility



**Joseph Foodscientist (Orade, Inc.)**  
 Supplier Portal Registrant
 New

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

**Company Information**


**Company Name:** Orade, Inc.  
**Website:** orade.com  
**Street Address 1:** 123 Elm Street  
**Street Address 2:**  
**City:** San Francisco  
**State/Province:** CA  
**Postal Code:** 94212  
**Country:** USA  
**Phone:** 555-222-3333  
**Fax:** 555-123-4321

**Associated Companies**

Company #	Company Name	
5011204	ABC Company	

**Add New**

**Associated Facilities**

Facility #	Facility Name	Company Name	
5011701	ABC Foods - Atlanta	ABC Foods	

**Add New**

**Tags**

Type	Tags
Print Template	Default

**Manage Tags**

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

## Contact Information Tab

The Contact Information tab, shown in [Figure 9–5](#), displays the contact information that the registrant has provided.

**Figure 9–5** Contact tab with registrant information in edit mode

The screenshot shows a web interface for a 'New' registrant. At the top, there is a header bar with a yellow hard hat icon, the text 'Joseph Foodscientist (Oracle, Inc.)', 'Supplier Portal Registrant', and a large 'New' button. Below the header is a tabbed interface with four tabs: 'Company Information', 'Contact Information' (which is selected and highlighted in blue), 'Access', and 'Status/Actions'. The 'Contact Information' tab is expanded, showing a form with the following fields and values:

Contact Information	
Contact Search Enabled:	<input checked="" type="checkbox"/>
First Name:	Joseph
Last Name:	Foodscientist
User Name:	foodscientist
Email:	joe.foods@abc.com
Street Address 1:	123 Elm Street
Street Address 2:	
City:	San Francisco
State/Province:	CA
Postal Code:	94212
Country:	USA <input type="button" value="X"/>
Phone:	555-222-3333
Fax:	555-123-4321

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

## Access Tab

The Access tab, shown in [Figure 9–6](#), displays access rights given to the registrant.

**Figure 9–6** Access tab with registrant information in edit mode

**Joseph Foodscientist (Oracle, Inc.)** New  
Supplier Portal Registrant

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

**Site Access**

☐ Quality

**eSignature Passphrase**

Enable Passphrase for eSignatures: ☐

**Group Membership**

Full Name	Description
<a href="#">Manage Groups</a>	

**User Available Languages**

Available UI Languages:

Proactive Translation Languages:

**DRL Catalogs**

Catalog(s):

**User Preferences**

UI Language:  ▼

Free Text Language:  ▼

### Site Access

Use this section to denote whether the supplier has access to Product Quality. When access to quality is given, the supplier will be able to participate in the quality management process by reading, editing and workflowing issues, corrective actions and audits.

### eSignature Passphrase

Enable a passphrase for those suppliers that are required to provide an eSignature for quality issues, actions or audits.

### Group Membership

Use this section to associate the supplier to UGM groups. Groups decide the following for the supplier: Roles, Workflow Visibility Tags, and OLS Classifications.

The role a supplier plays during the quality process is determined by group membership. For example, to give the supplier the ability to create quality actions, assign the supplier to a group with the [CREATE\_FROM\_TEMPLATE\_7003] role. Groups should also be used to manage workflow participation and permissions.

### **User Available Languages**

These are the languages that will be available to the supplier in Supplier Quality. The language the supplier selects when logging into Supplier Portal will be used.

### **DRL Catalogs**

The supplier can be given explicit access to specific DRL Catalogs. For more information see [Chapter 5, "Using Document Reference Library"](#).

### **User Preferences**

This sets the default language for the supplier. The language the supplier selects when logging into Supplier Portal will be used, however if they select a language that is not applicable, this will be the language used.



## Status/Actions Tab

The Status/ Actions tab, shown in [Figure 9–7](#), 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 9–7** Status/Actions tab

The screenshot shows the 'Status/Actions' tab for a new registrant named 'Joseph Foodscientist (Oracle, Inc.)'. The page has a header with the registrant's name and a 'New' status. Below the header are four tabs: 'Company Information', 'Contact Information', 'Access', and 'Status/Actions' (which is selected). The 'Status/Actions' tab is divided into three sections:

- Next Action:** Contains two buttons: 'Approve' and 'Reject'. The 'Approve' button has a tooltip that says 'This action will approve the submitted application and enable the user to log into the Vendor Portal'. The 'Reject' button has a tooltip that says 'This action will reject the submitted application and not allow the user to log into the Vendor Portal'.
- Current Status:** Displays 'Registration Date: 12/17/2007 4:27 PM' and 'Current Status: New'.
- Event History:** A table showing the following events:
 

Event	User	Time
Added Facility - ABC Foods - Atlanta	Sarah Adams	12/20/2012 9:43 AM
Added Company - ABC Company	Sarah Adams	12/20/2012 9:43 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 9-8](#) shows.

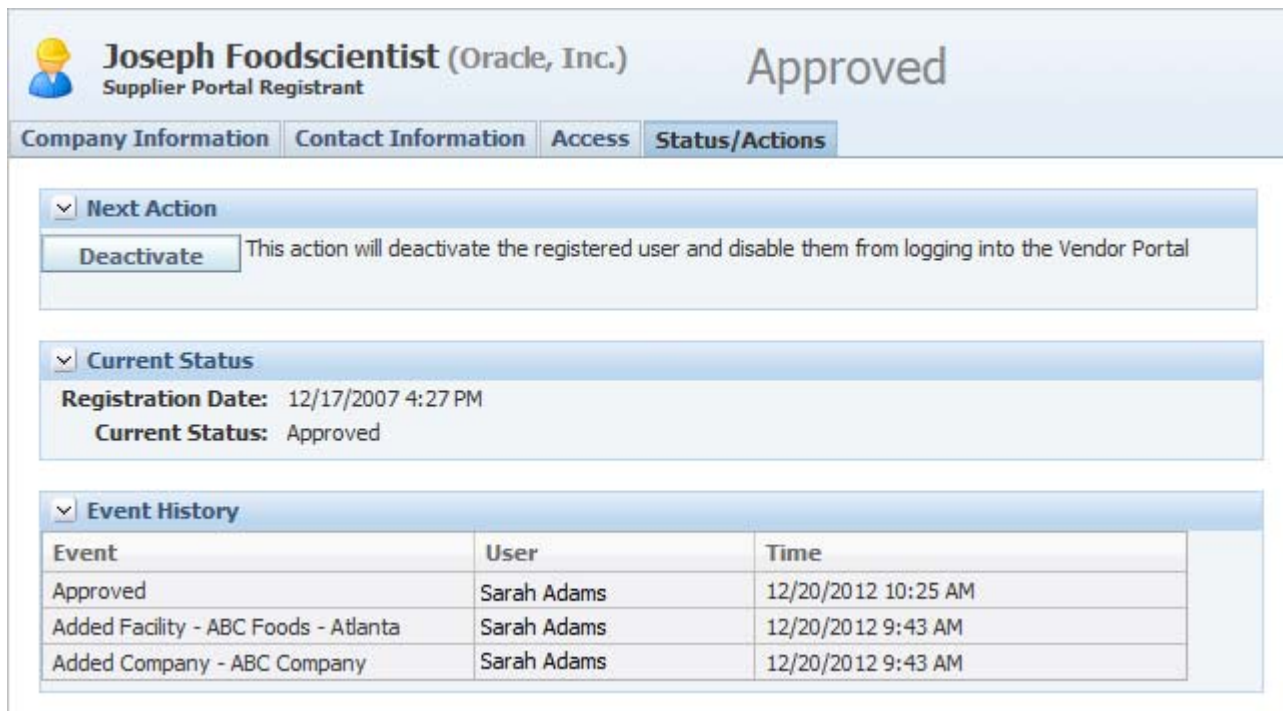
**Figure 9-8 Approved Registrations page**



Name	Company	Login	Approved
<a href="#">Smith, Mike</a>	ABC Foods	smith	5/17/2007 3:32:35 PM

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 Portal Registrant page displays, as described beginning on page 9-2. The administrator clicks **Edit** to edit information on this page. [Figure 9-9](#) shows the page in edit mode.

**Figure 9-9 Supplier Portal Registrant page, Status/Actions tab in edit mode**



Event	User	Time
Approved	Sarah Adams	12/20/2012 10:25 AM
Added Facility - ABC Foods - Atlanta	Sarah Adams	12/20/2012 9:43 AM
Added Company - ABC Company	Sarah Adams	12/20/2012 9:43 AM

To deactivate a registrant, the administrator clicks **Deactivate** on the Status/ Actions tab, 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 9-10 shows:

**Figure 9-10 Rejected Registrations page**

Rejected Registrations			
Results Per Page: 10 ▼			
Name	Company	Login	Rejected
<a href="#">Jones, Trey</a>	ABC Manufacturing	tjones	4/23/2009 2:20:29 AM

The administrator clicks on the first and last name link to view more information about the registrant. The Supplier Portal Registrant page displays, as described beginning on page 9-2. The administrator clicks **Edit** to edit information on this page, as shown in Figure 9-11:

**Figure 9-11 Supplier Portal Registrant page, Status/Actions tab in edit mode**

	<b>Madge Clark</b> Supplier Portal Registrant	<b>Rejected</b>						
<div>Company Information</div> <div>Contact Information</div> <div>Access</div> <div><b>Status/Actions</b></div>								
<div>▼ Next Action</div> <div> <div>Approve</div> <div>This action will approve the submitted application and enable the user to log into the Vendor Portal</div> </div>								
<div>▼ Current Status</div> <div> <b>Registration Date:</b> 5/13/2009 12:33 PM  <b>Current Status:</b> Rejected         </div>								
<div>▼ Event History</div> <table border="1"> <thead> <tr> <th>Event</th> <th>User</th> <th>Time</th> </tr> </thead> <tbody> <tr> <td>Rejected</td> <td>Sarah Adams</td> <td>12/20/2012 10:29 AM</td> </tr> </tbody> </table>			Event	User	Time	Rejected	Sarah Adams	12/20/2012 10:29 AM
Event	User	Time						
Rejected	Sarah Adams	12/20/2012 10:29 AM						

To activate the rejected registrant, the administrator clicks **Approve** on the Status/Actions tab, 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 9-12](#) shows the Deactivated Registrations page.

**Figure 9-12 Deactivated Registrations page**

Name	Company	Login	Deactivated
<a href="#">Orange, Jerry</a>	LBK Oranges	orange	4/23/2009 2:33:05 AM

The administrator clicks on first and last name link to obtain more information about the registrant. The Supplier Portal Registrant page displays, as described beginning on page 9-2. The administrator clicks **Edit** to edit information on these tabs, as shown in [Figure 9-13](#).

**Figure 9-13 Supplier Portal Registrant page, Status/Actions tab in edit mode**

**Jerry Orange (LBK Oranges)**  
Supplier Portal Registrant

**Deactivated**

Company Information | Contact Information | Access | **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:** 2/6/2008 1:59 PM  
**Current Status:** Deactivated

Event History

Event	User	Time
Deactivated	Sarah Adams	4/23/2009 2:33 AM
Approved	Sarah Adams	2/6/2008 2:07 PM
Added Company - ABC Company	Sarah Adams	2/6/2008 2:07 PM
Added Company - A E Staley Manufacturing Co	Sarah Adams	2/6/2008 2:07 PM

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