Oracle® Agile Product Lifecycle Management for Process

Supplier Portal User Guide

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Oracle Agile Product Lifecycle Management for Process Supplier Portal User Guide, Release 6.2.4.x

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Contents

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 contact profile in the Supply Chain Relationship Management (SCRM) application to manage Supplier Portal registrations.

This preface contains these topics:

- Audience
- Variability of Installations
- Documentation Accessibility
- 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.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

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 User Group Management 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:

  https://www.oracle.com/technical-resources/documentation/agile.html#plmprocess

Conventions

The following text conventions are used in this document:

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

1

Introducing Supplier Portal

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

- Supplier Portal 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"
- 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"
- Work with questionnaires, as described in Chapter 5, "eQuestionnaires"
- Obtain guidance surrounding expectations of deliverables in the form of catalogs of documents from a managed library, as explained in Chapter 7, "Using Document Reference Library"

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.

Suppliers can request access to Supplier Portal using the self-registration process, or a Supplier Manager can be assigned to manage registrations. Managing access to Supplier Portal is described in Chapter 2, "Accessing Supplier Portal".

Note: Granting access to Supplier Portal to a supplier was previously handled by the Supplier Portal Administration (SPA) application. This feature is now managed in SCRM. Refer to the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide* for more information about managing contact profiles.

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 interfaces 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*.

Now, supplier contacts are also managed in SCRM. Refer to "Managing Contacts" on page 6-1 for guidance.

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 10-4 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, and review questionnaires that were sent to them in Supplier Portal. Users with admin privileges can re-assign, edit and view eQs for company contacts. 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.

2

Accessing Supplier Portal

This chapter describes how a company's suppliers access Supplier Portal, and how access can be managed by assigning a Supplier Manager to handle requests. It includes the following topic:

- Accessing Supplier Portal—Registrants
- Assigning a Supplier Manager

Accessing Supplier Portal—Registrants

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

Self-Registering

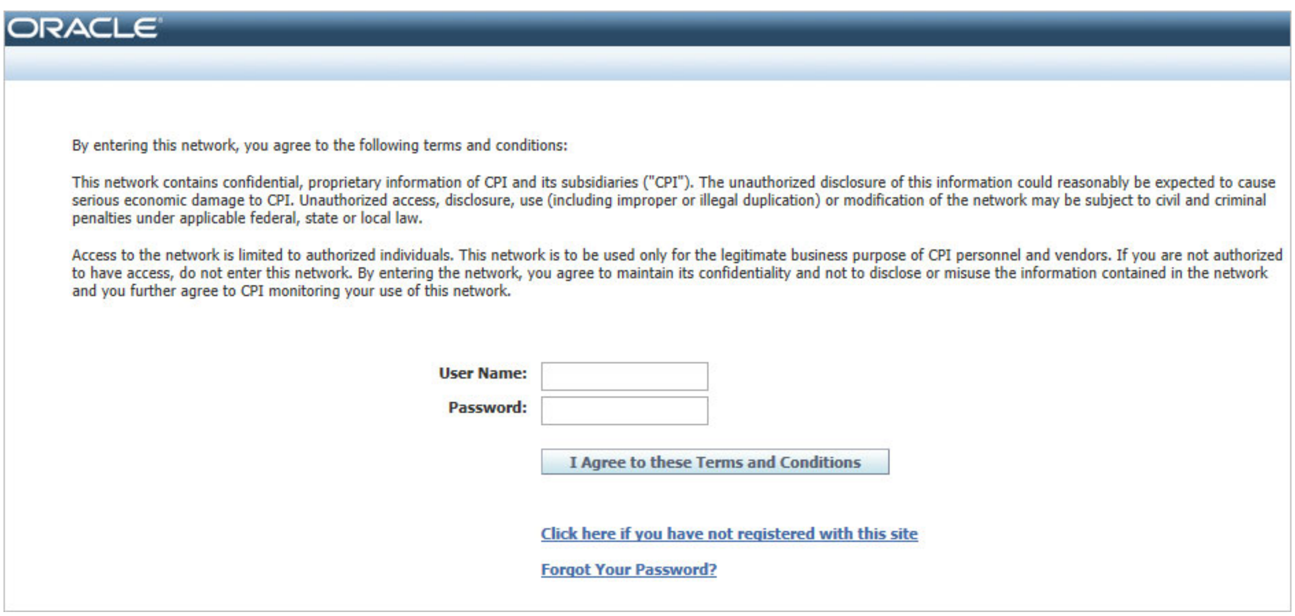
Based on a configuration, you can give the supplier the ability to self-register for access to Supplier Portal. When `SP.SupplierSelfRegistration.Enabled` is set to true, suppliers will be presented with a link on the Supplier Portal Login page allowing them to request access. See the following pages for more information about these self registration requests.

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



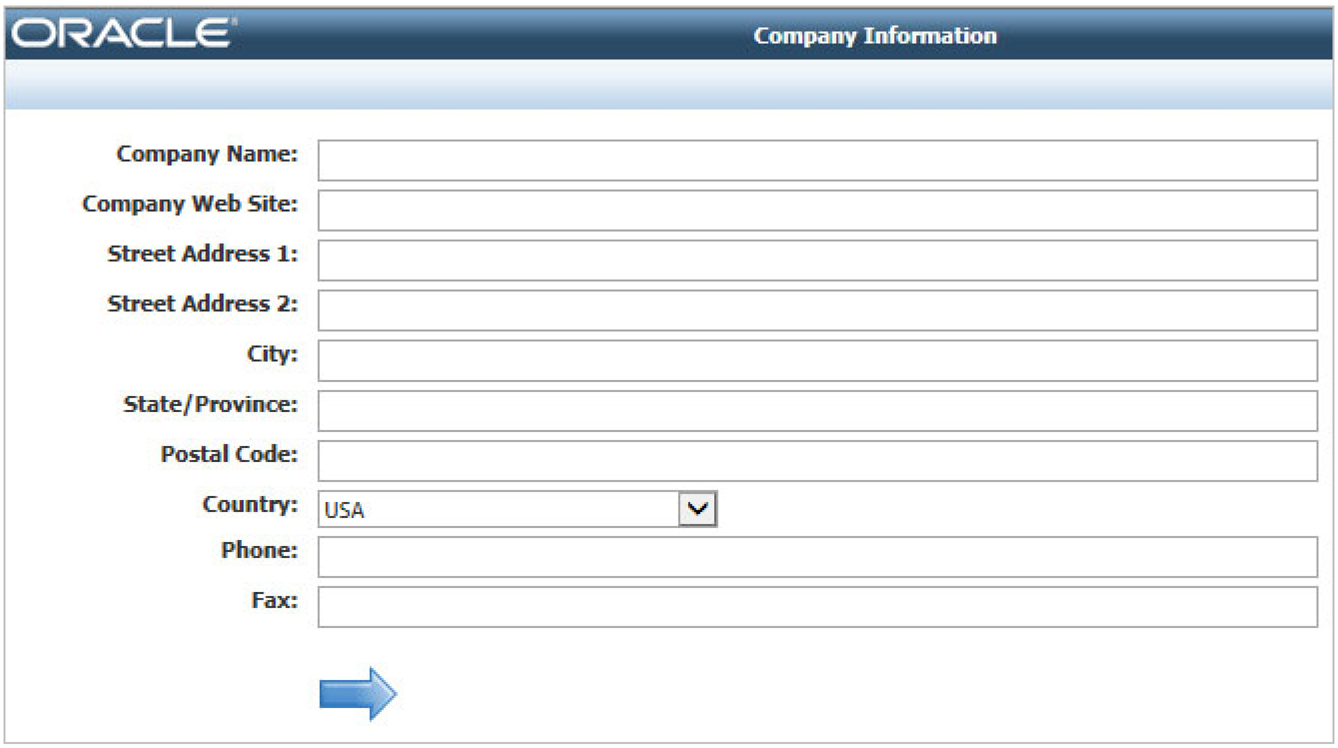
The supplier logs in using a user name and password. Or, if the supplier has not yet registered, the supplier clicks the **Click here if you have not registered with this site** link.

Note: When the following configuration is set as true, the **Click here if you have not registered with this site link** will be displayed on the page. If set to false, self-registration is disabled.

```
<add key="SP.SupplierSelfRegistration.Enabled">
```

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

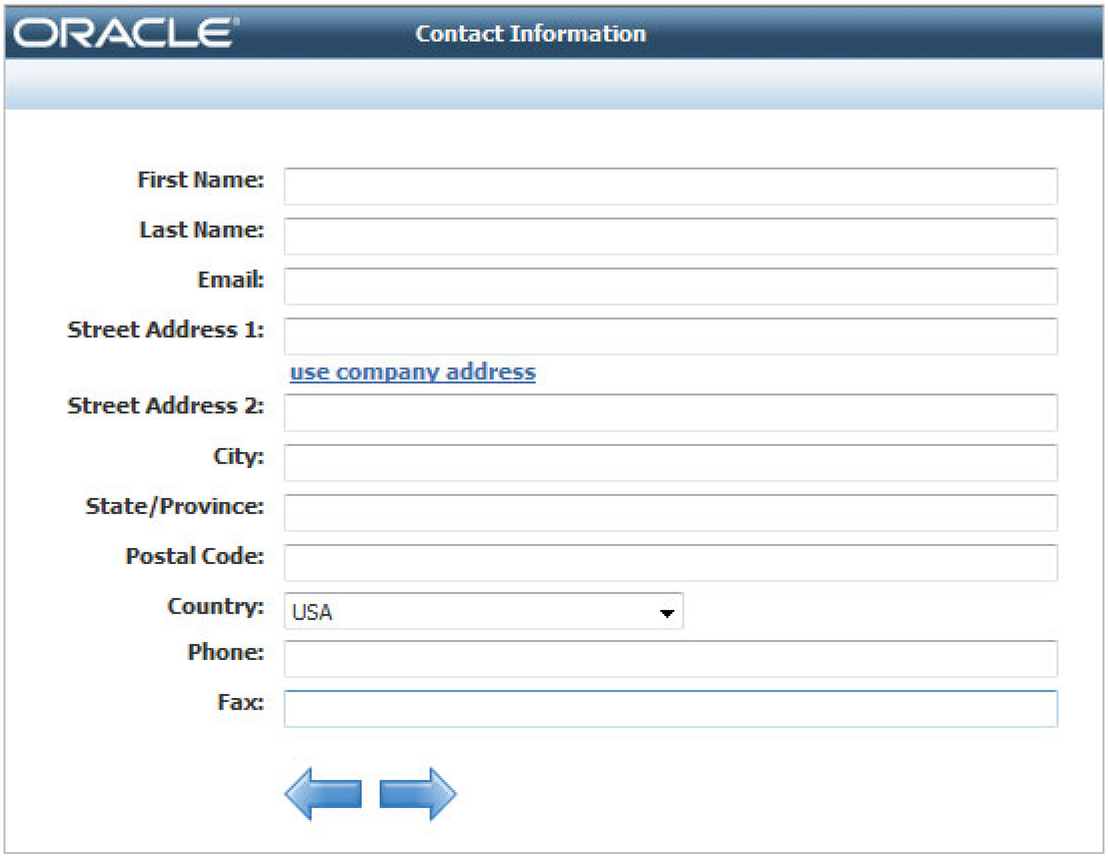


This is the first page where a supplier fills out company information. The following fields are required:

- 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

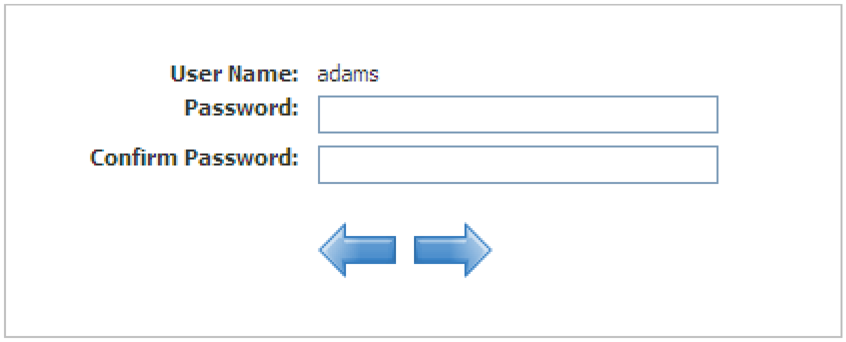


This is the second registration page where a supplier provides contact information. The following fields are required:

- 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

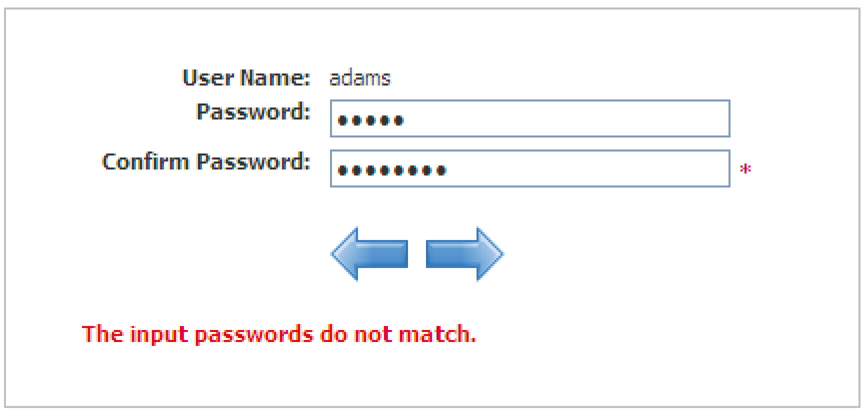


This is the third page of the registration process. The User Name field displays the system defined user name. The supplier enters a password in the **Password** field, and confirms it by typing it again in the **Confirm Password** field.

Passwords requirements vary based on configuration.

If the passwords do not match, an error message is displayed as shown in Figure 2–6.

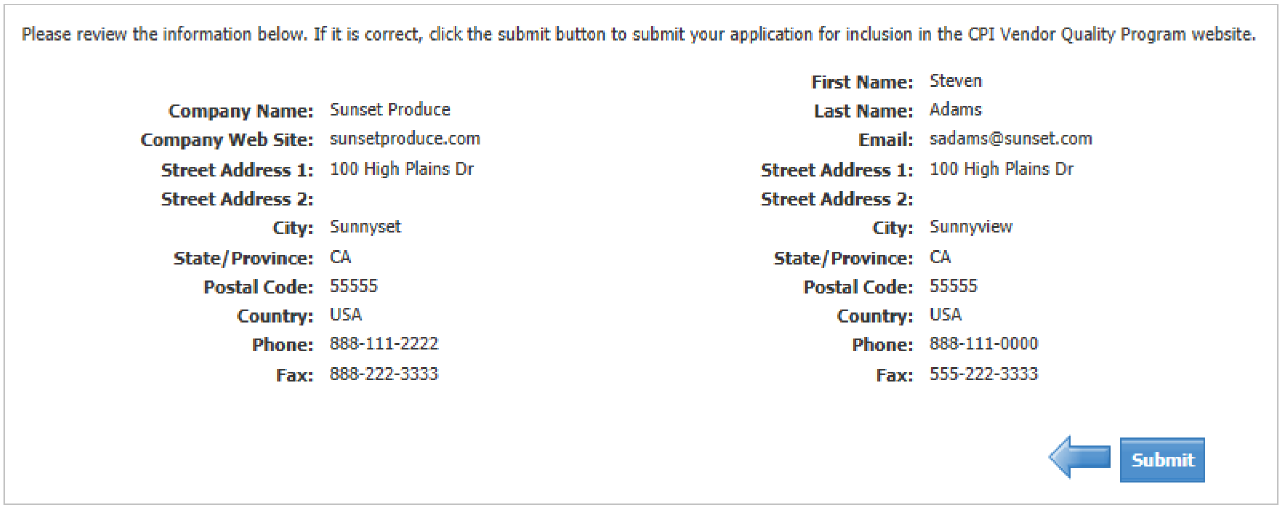
Figure 2–6 Error message



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.

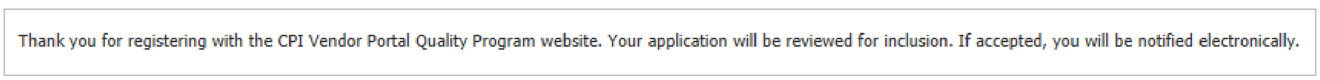
The Registration Summary page, shown in Figure 2–7, is the final place for the supplier to review the information provided before submitting the registration request.

Figure 2–7 Registration Summary page



When the supplier clicks **Submit**, the request is reflected in the contact profile, and included in the New Registrations tab in Action Items in SCRM. 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 Contact administrator.

Figure 2–8 Thank You page



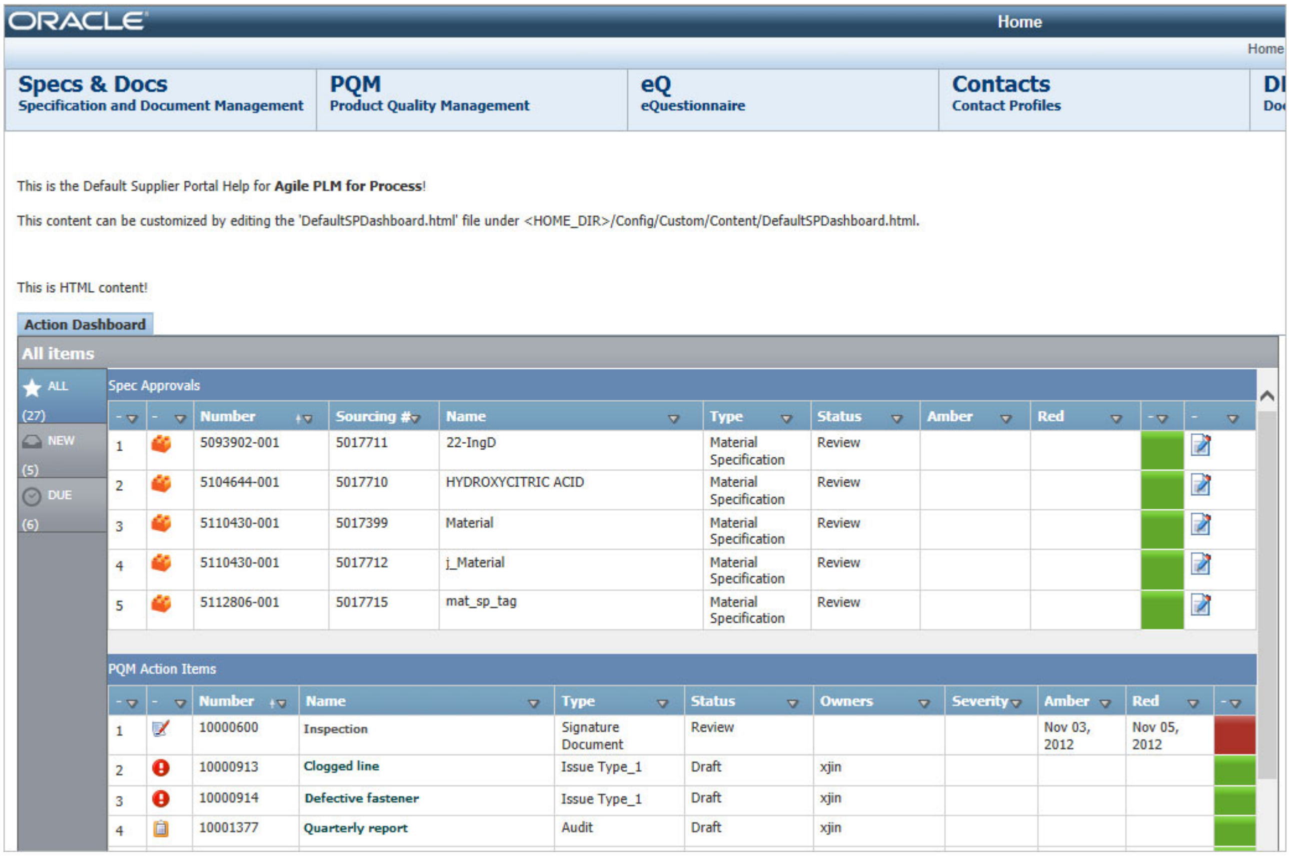
The administrator accesses the contact profile and views the registration request. The administrator can either grant or deny the request from the supplier. When the administrator approves the request from the supplier, the supplier will receive an email confirming that the request has been granted. 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.

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. Action Dashboard lists sourcing approvals the supplier needs to review and workflow, PQM items the supplier needs to review and workflow, and questionnaires the supplier needs to complete.

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, 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
- Manage questionnaires
- Manage profile and preferences

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.

Assigning a Supplier Manager

Suppliers can now manage and request their own employees' access to Supplier Portal. You can now assign a specific Supplier Portal registrant as a supplier manager. Supplier Manager includes the following features:

- Managers can remove portal access for an employee.
- Managers can request portal access for a new employees.
- Managers have their own action item view. They are able to see all of their employees' open questionnaires and specification review tasks.
- Managers can reassign questionnaire owners.
- Managers can manage/request employee access to Supplier Portal.

These tasks are described later in this guide.

3

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
- 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

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.

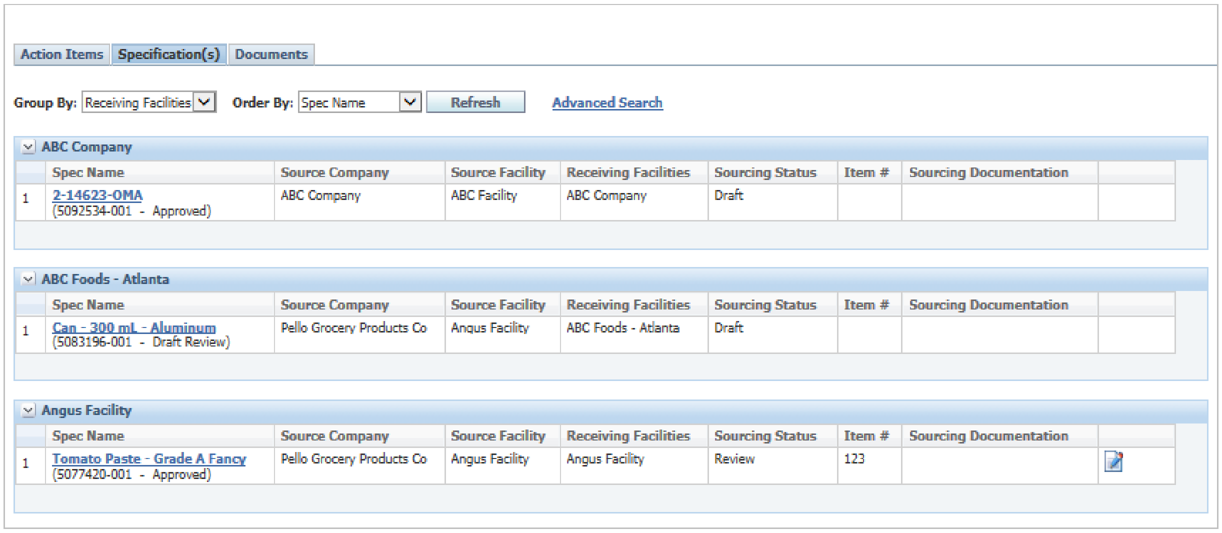
1. **Group By**—Select a choice to group the specifications by:
   - Source Company
   - Source Facility
   - Receiving Facilities
   - Status
   - -- No grouping (The supplier would select this to only use the Order By option)
2. **Order By**—Select a choice to order the specifications by:
   - Spec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

Click the **Advanced Search** link to perform a search for a specification.

Figure 3–2 Specification(s) tab



Each specification is listed with the following key information:

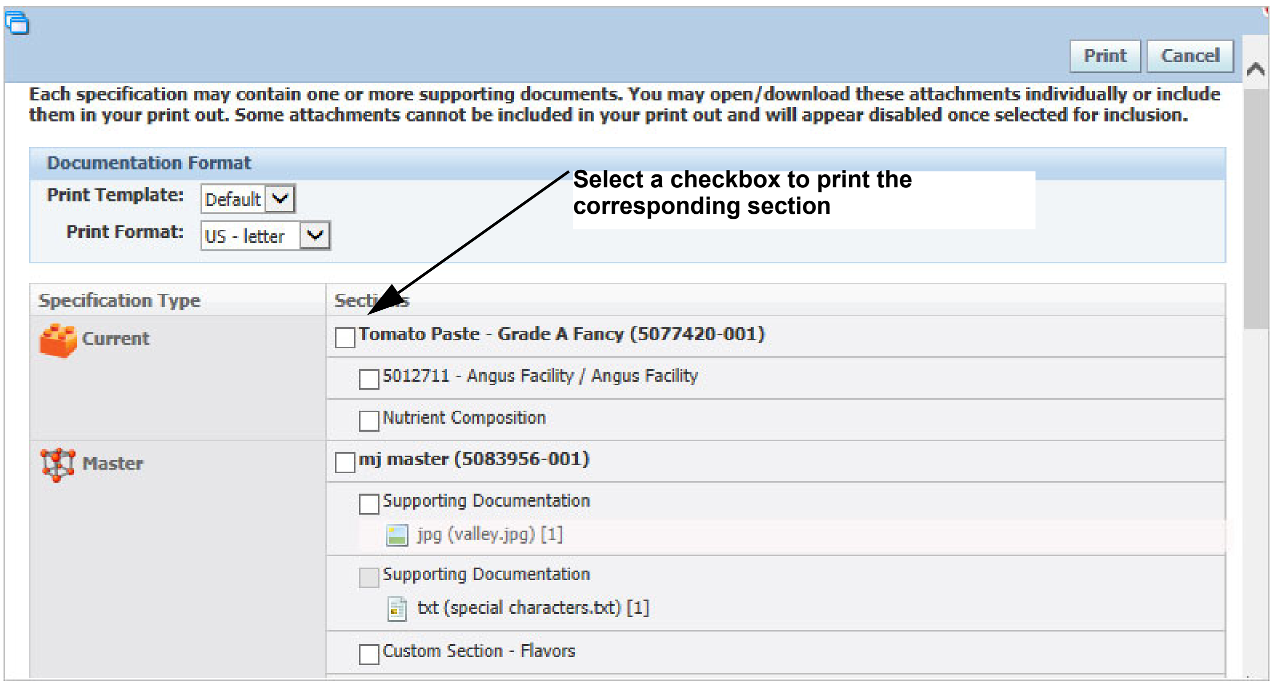
- **Spec Name**—The specification name
- **Source Company**—The company sourcing this specification
- **Source Facility**—The facility sourcing this specification
- **Receiving Facilities**—The facilities that receive this specification
- **Sourcing Status**—The status of the sourcing approval (draft, approved, etc.)
- **Item #**—The unique material ID assigned by the supplier. The Item # is found on the sourcing approval.
- **Sourcing Documentation**—The field displays supplier documents associated with a sourcing approval.

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



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 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 Workflow Administration User Guide*.

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

- Supplier documents
- %Breakdowns
- Shelf Life
- Custom Sections
- Extended Attributes

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

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 *Agile Product Lifecycle Management for Process Workflow Administration User Guide* for more information.

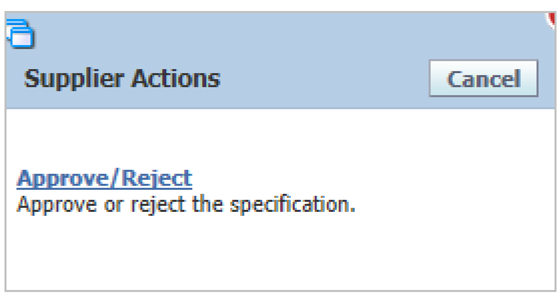
Supplier Actions

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

Approving Specifications

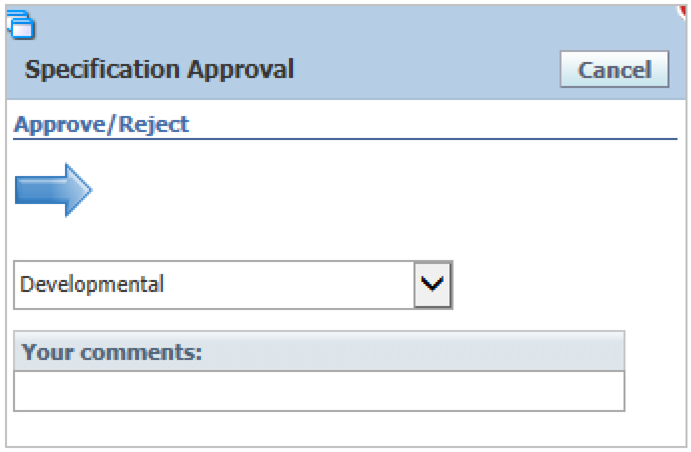
Suppliers can view the specification by clicking the hyperlinked **Spec Name** field, as described in "Printing and Viewing a Specification" on page 3-4. Suppliers can take action on a specification, providing an electronic signature, by clicking the supplier actions icon. The Suppliers Action dialog 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 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 Workflow Administration 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. However, the specification will still be published to Supplier Portal in the specification listing as long as it is in a status of “publish to supplier portal”.

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 View

The workflow status of the sourcing approval controls when a specification is ready for supplier approval. When accept or reject is submitted by the supplier, the sourcing approval is workflowed to the supplier selected status. The sourcing approval’s “Supplier Signed Spec” checkbox is updated. If accepted, the checkbox is checked and the date signed off is added to the text field. If rejected, the checkbox is unchecked.

The audit trail on the sourcing approval captures the supplier workflow event. It displays the name of the supplier who workflowed the sourcing approval, the date/time it was workflowed and any comments the supplier included.

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 Workflow Administration 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.

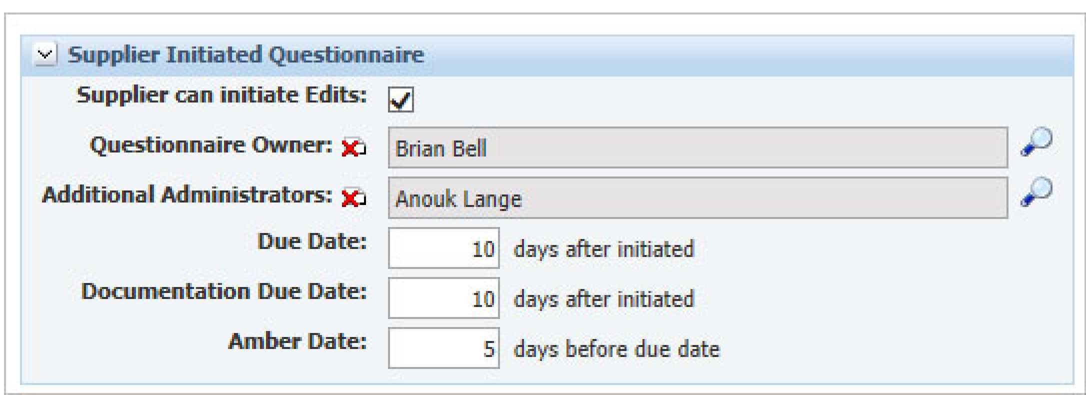
For more information, on questionnaires, refer to the *Agile Product Lifecycle Management for Process eQuestionnaire User Guide*. Refer to the *Agile Product Lifecycle Management for Process Supply Chain Relationship Management User Guide* for more information on sourcing approvals.

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



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

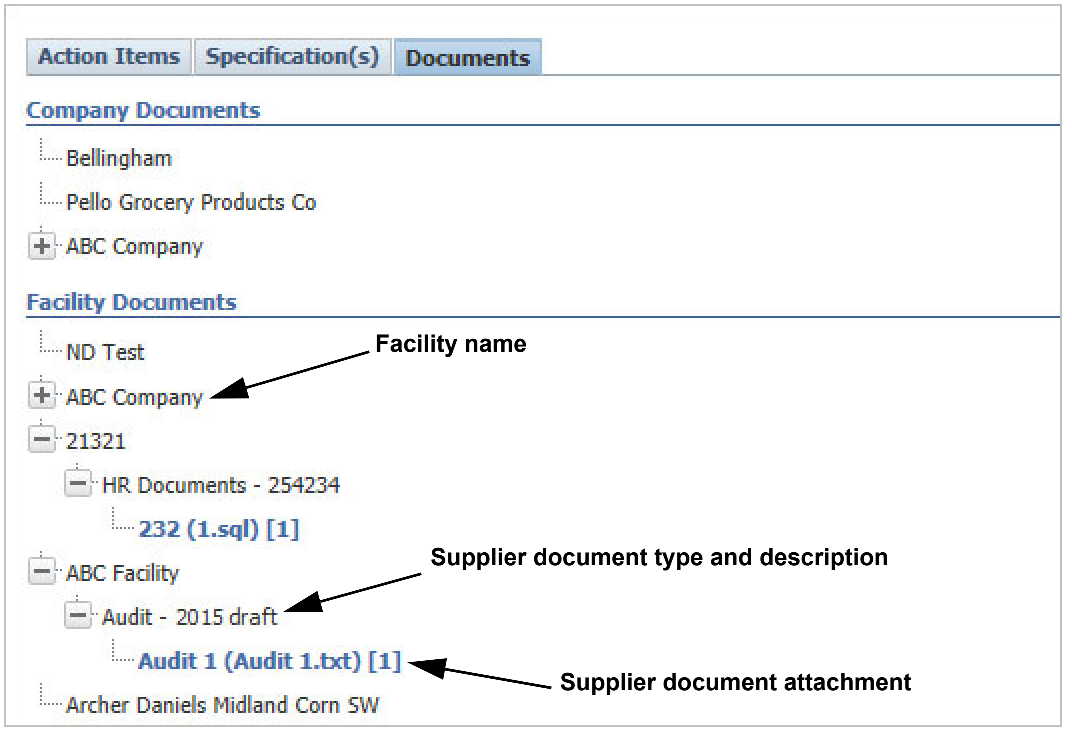


Figure 3–7 above shows the hierarchy of how the documents are stored. The Supplier Document Type feature works much like a folder in that it holds related files in one spot. You can click the expand node icon to expand the listing, or “open” the folder. Files can be attached independently to a company 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.

4

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. 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 Workflow Administration User 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.

5

eQuestionnaires

This chapter describes how a supplier uses the supplier eQuestionnaires (eQ) module. It includes the following topics:

- Overview
- Viewing eQs
- Reassigning the eQ
- Editing eQs

Overview

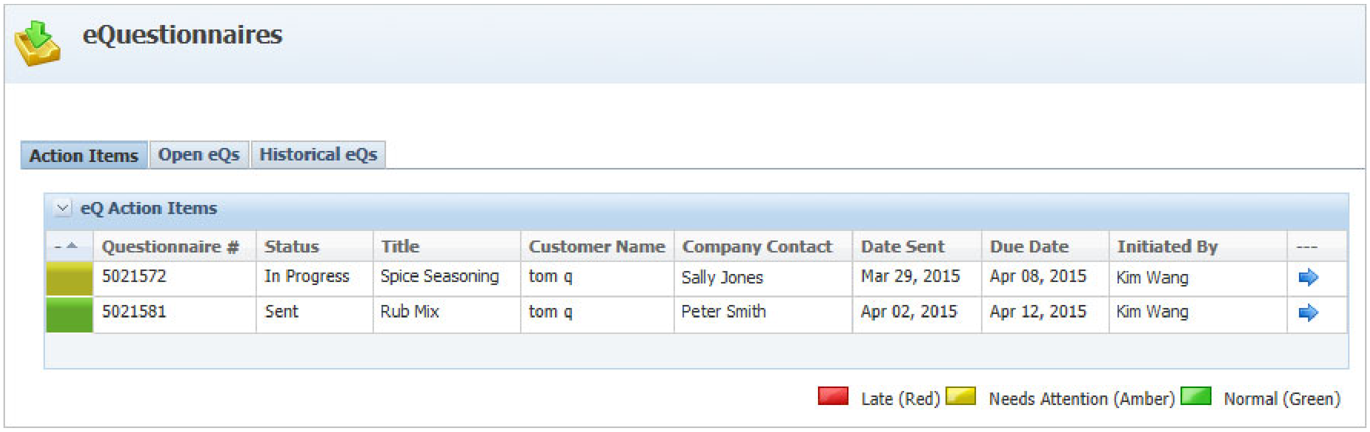
eQuestionnaires are integrated into Supplier Portal. Contacts can view and edit assigned eQs and users with the [SUPPLIER_PORTAL_ADMIN] role can:

- Re-assign eQs to other company contacts
- View open eQs for all company contacts
- Edit open eQs for all company contacts
- View previously submitted eQs

Viewing eQs

The supplier can work with eQs for company contacts by clicking **eQ** from the Home page. The Action Items page only displays if the supplier has action items. This page contains equestionnaires for company contacts, as Figure 5–1 shows.

Figure 5–1 Action Items



In addition to the Action Items tab that shows all assigned eQs in "Sent" or "Pending" status for the user, there are two additional tabs:

- **Open eQs**—All assigned eQs in "Sent" or **"**Pending**"** status for the user's associated companies. Must have "Manager" site access as set in the contact profile to see and use this tab.
- **Historical eQs**—All assigned eQs in "Submitted" status for the user. Users with "Manager" site access can see this tab.

Key fields include:

Customer Name—First and last name of the company contact (not the supplier contact). This field is not displayed on the Historical eQs tab.

Company Contact—First and last name of the supplier contact.

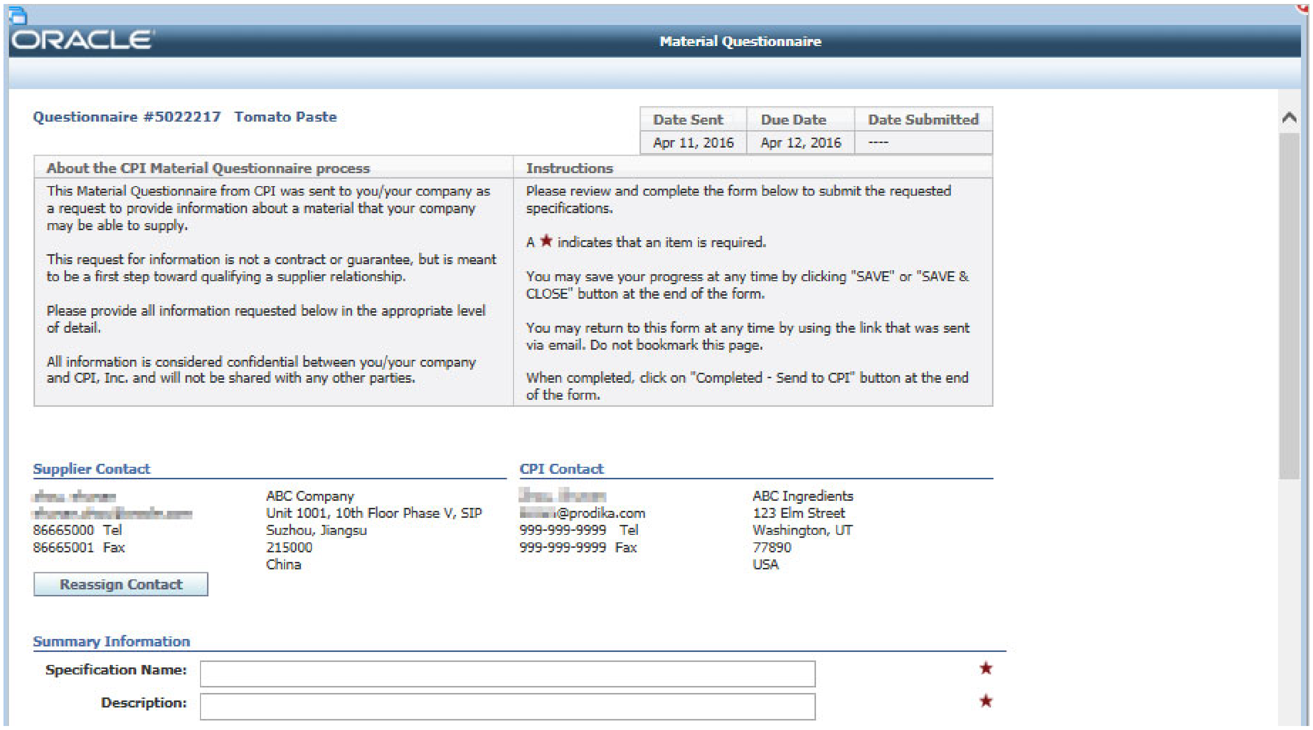
Initiated By—If the eQ is supplier-initiated then the contact name is displayed. If it is not supplier-initiated, the primary owner is displayed.

Edit Icon column (not labeled)—Not displayed on the Historical eQs tab, this column contains the reassign contact icon. For instructions, see "Reassigning the eQ" on page 5-3.

Note: The icon is visible if the "SP.SuppliereQReassign.Enabled" configuration is set to "True".

Click in any row to view a questionnaire. Supplier Portal displays the Questionnaire window.

Figure 5–2 Questionnaire window



Reassigning the eQ

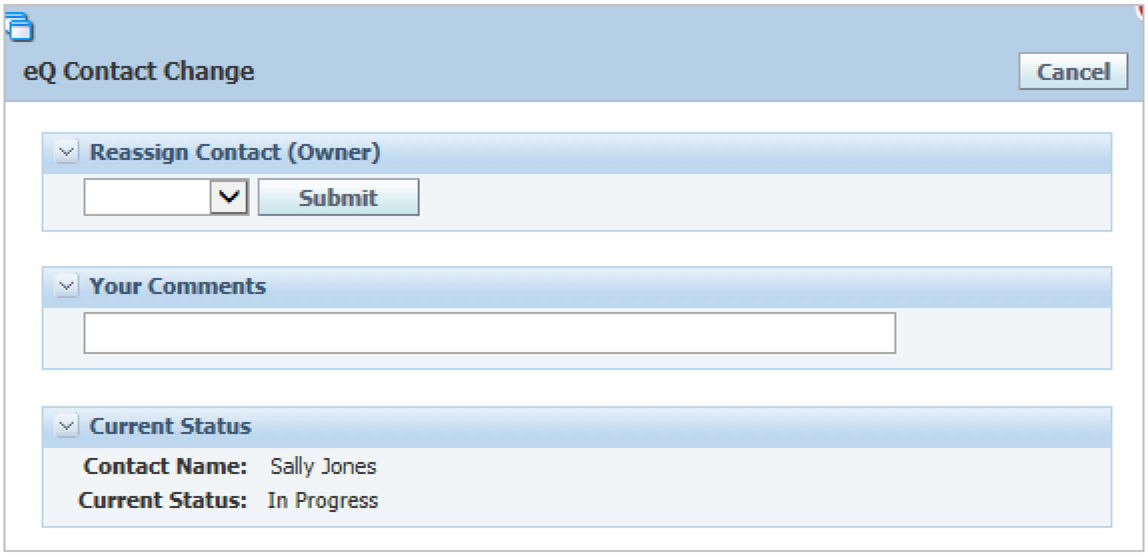
The following configuration enables users with “eQ” site ass to reassign owned eQs to a different company/facility contact.

```
<!-Supplier Portal -->
<add key="SP.SuppliereQReassign.Enabled" value="True"/>
```

If "SP.SuppliereQReassign.Enabled" configuration is set to "true", users with “eQ” Site Access can reassign eQs.

Managers can reassign an eQ from the Action Items tab and Open eQs tab by clicking the reassign contact icon. The eQ Contact Change window displays.

Figure 5–3 eQ Contact Change window



The Current Status sections contains two fields:

Contact Name—Current supplier contact.

Current Status—Status of the eQ.

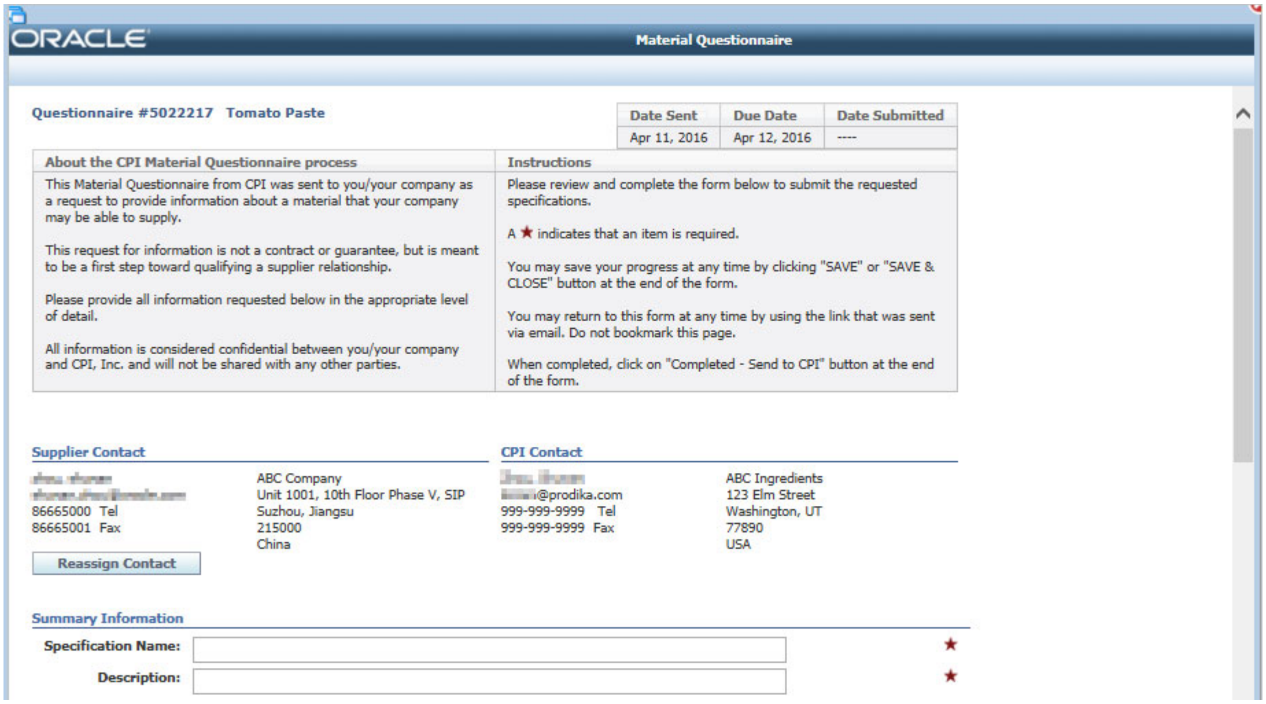
To reassign the contact:

1. Choose an owner from the **Reassign Contact (Owner)** drop-down. Choices are contact profiles associated to the company for which the eQ was originally submitted.
2. Enter comments in the **Your Comments** field (required).
3. Click **Submit**. Notification emails are sent to the original supplier contact, the new supplier contact and the company contact email addresses. The eQ contains a Change Contact button which can be used to complete the reassignment. See the *Agile Product Lifecycle Management for Process eQuestionnaire User Guide* for more information.

Editing eQs

Using the Open eQs tab, you can edit open eQs for all company contacts. Click any eQ to open it. The Questionnaire window displays.

Figure 5–4 Questionnaire window



You can then make changes to the questionnaire.

6

Managing Contacts

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

- Controlling Access in Supplier Portal
- Displaying Your Company and Facility Contacts to a Supplier

Controlling Access in Supplier Portal

Suppliers are given access to Supplier Portal by managing contact profiles in SCRM. See “Portal Access” on page 6-3 for more information around managing supplier access in contact profiles.

Based on a configuration, you can also give the supplier the ability to self register. When `SP.SupplierSelfRegistration.Enabled` is set to true, suppliers are presented with a link on the Supplier Portal login page allowing them to request access. See "Self-Registering" on page 2-1 for more information about these self registration requests.

Suppliers can also be assigned as Supplier Managers. If a supplier is a manager they can manage their employees’ access to the portal. You can learn more information about the Supplier Manager role later in this chapter.

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.

Contacts Page

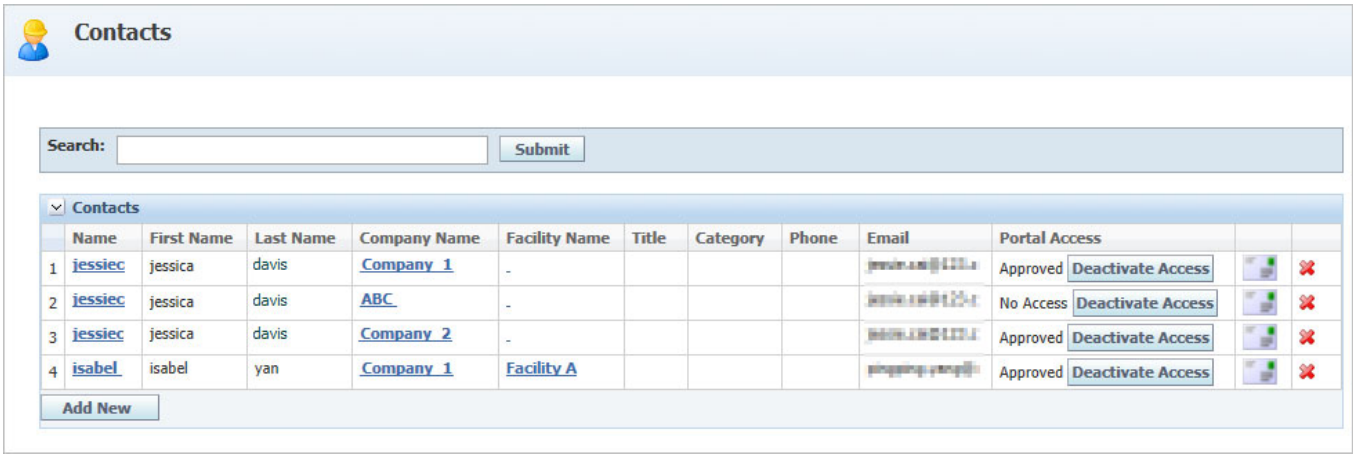
This page displays all contacts tied to a company or facility that are in non-Archived status. Contacts are set up in the SCRM application.

> **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*.

You can search for a name, title or other information related to a contact using the Search field. All contacts matching the search criteria are displayed. This grid could display a single contact profile multiple times if the contact is related to multiple companies and/or facilities.

You can select a contact, company or facility by clicking the linked object in the respective column and users with particular roles can control portal access.

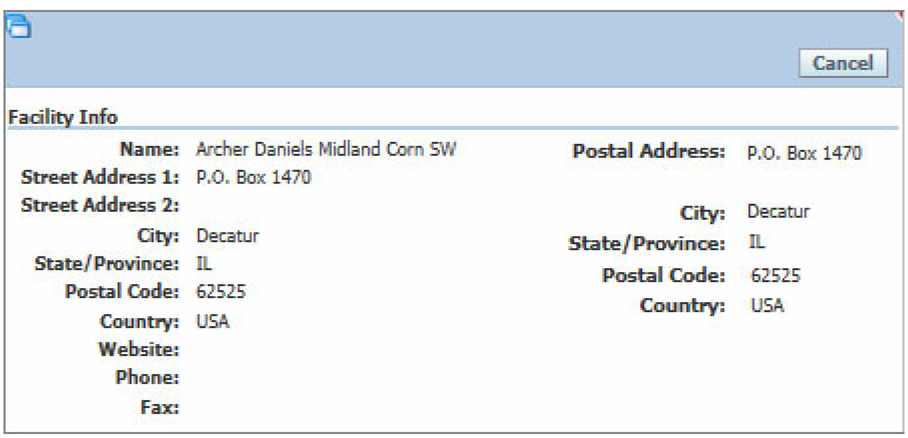
Figure 6–1 Contacts page



Key fields include:

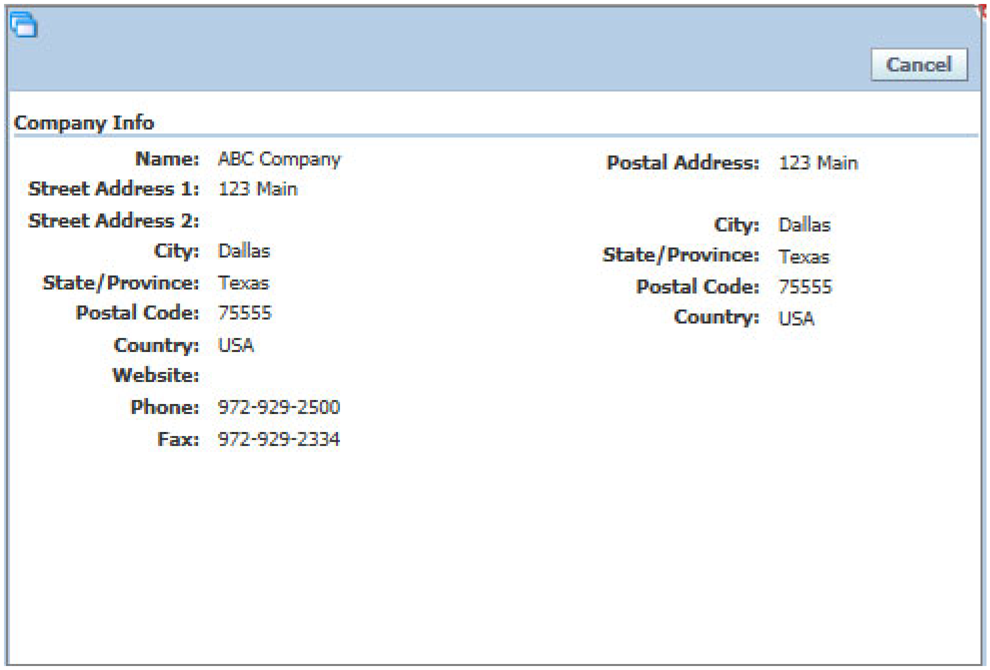
- **Facility Name**—Clicking on the linked name displays the Facility Info dialog box shown in Figure 6–2.

Figure 6–2 Facility Info dialog box



- **Company Name**—Clicking the linked name displays the Company Info dialog box shown in Figure 6–3.

Figure 6–3 Company Info dialog box



- **Name**—Contacts for the facility and the facility's parent company are displayed on the Contacts page. 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.

- **Portal Access**—Displays the status of portal access for the contact by combining the "User Access" flag and "Supplier Portal Access" status. Options are "Approved" and "No Access". Users with Manager site access can change portal access by clicking the displayed button. Choices are:
  - **Deactivate Access**—Contact no longer can access Supplier Portal. This button appears for contacts with "Approved" status. This option is described in more detail in "Deactivating Access for a Contact" on page 6-6.
  - **Request Access**—Contact can access Supplier Portal. This button appears for contacts with "Not Initiated", "Rejected" or "Deactivated" status. This option is described in more detail in "Requesting Access for a Contact" on page 6-6.
- **Email Icon column (not labeled)**—The Email Icon button launches the user's default email application and populates the following content:

  In the "To:" email address line, if the new "Admin Owner" field is populated on the associated company profile (or parent company of the associated company or facility profile), populate the "To:" address line with the email addresses of the users and/or group members in the "Admin Owner" field. If the new "Admin Owner" field is ***not*** populated then the address line should be populated with all [SUPPLIER_PORTAL_ADMIN] user's email addresses associated to the country of the contact profile.

  In the "Subject" line: "[Company Name]: [User's First Name and Last Name] ([UserName])"

- **Delete column (not labeled)**—Click the delete icon to delete the contact. This column is displayed for managers when the following configuration is set:

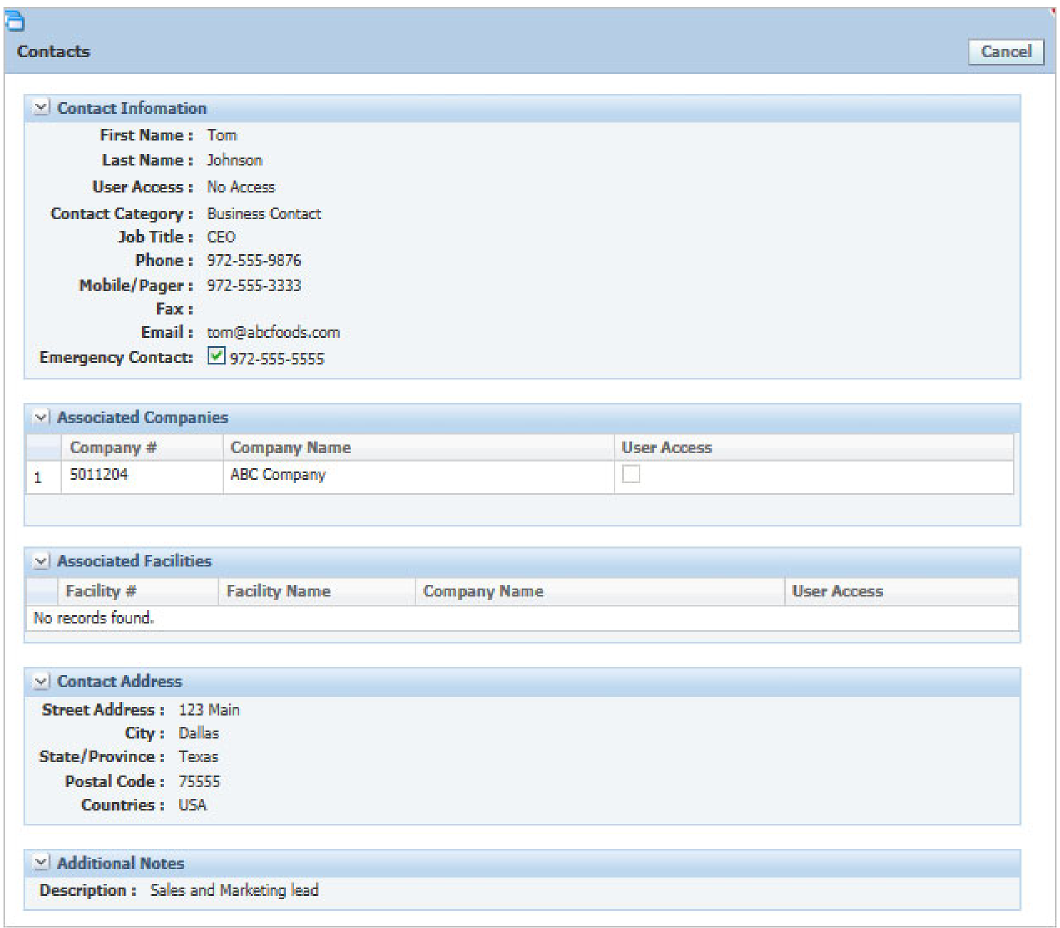
```
<!-- Supplier Portal -->
<add key="SP.ManagerContactPortalAccessDeleter.Enabled" value="False"
configDescription="When set to "True", users with Supplier portal Manager site
can delete Contacts from Companies or Facilities, this could lead to orphaned
Contact Profiles."/>
```

  This option is described in more detail in "Deleting a Contact" on page 6-7.

Contacts Page

This page contains information for the Supplier Portal contact.

Figure 6–4 Contacts page



This page consists of the following sections, described on the following pages:

- Contact Information
- Associated Companies
- Associated Facilities
- Contact Address
- Additional Notes

Contact Information Section

This section displays basic information for the contact as set up in SCRM or Supplier Portal. Key fields include:

- **User Access**—Reflects the current status for the user in Supplier Portal. As requests are made for the contact, this field updates. For example, when a Supplier Portal Admin requests access for a new user, then field updates to “No Access” and shows the email icon. The admin can click the email icon to email a request for access to be granted.
- **Portal Access**—Once a contact is granted access to Supplier Portal this field displays, showing a status of “Approved”. Users with manager rights see a **Deactivate Access** button and email icon which can be used to take further action.

Associated Companies Section

This section displays companies that the current supplier is related to and also the contact is related to.

Associated Facilities Section

Facilities that the contact is tied to display in this section, along with the parent company.

> **Note:** The Associated Companies and Associated Facilities grids are affected by the configuration `"SP.Manager.UserAccessChecked.Enabled"`. If set to 'true', when a manager associates a new company or facility profile to an existing contact profile with 'Approved' Portal Access, the 'User Access' flag is automatically checked and grants Supplier Portal Manager role edit access to the 'User Access' checkbox.

Contact Address Section

The address for the contact as set up in SCRM.

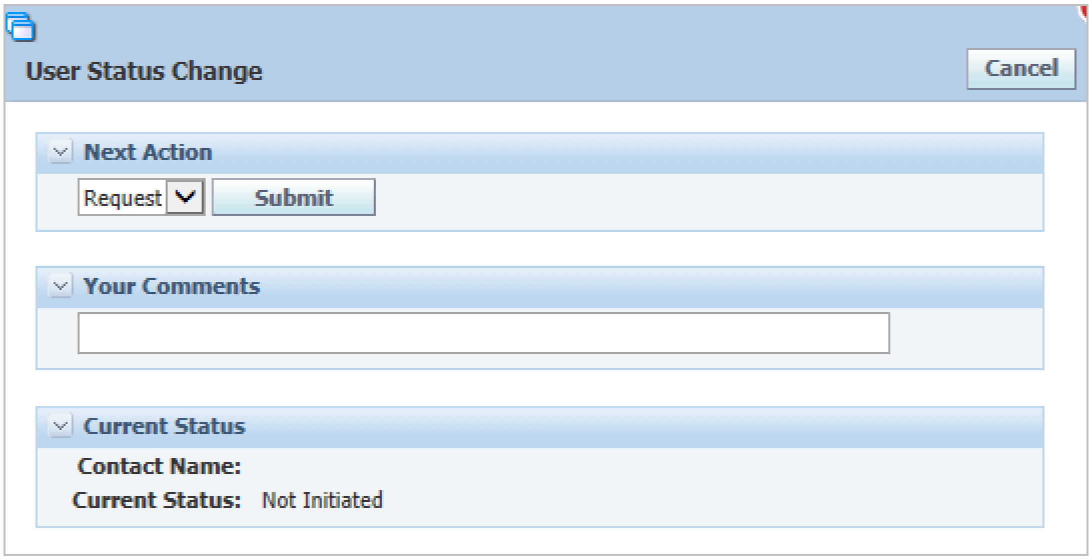
Additional Notes Section

These are additional details about the contact as set in SCRM.

Requesting Access for a Contact

When the manager in Supplier Portal submits a request for a Supplier Portal user's portal access, the User Status Change window is displayed.

Figure 6–5 User Status Change window



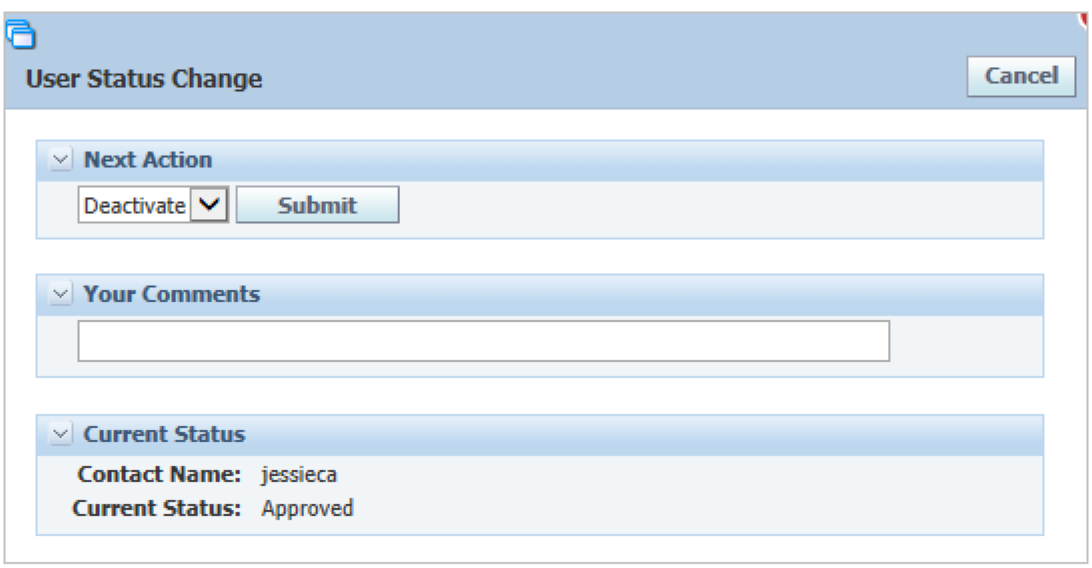
Enter comments in the Your Comments field (required), and then click **Submit**.

- An email is sent to the appropriate Supplier Portal Admin requesting approval.
- The contact profile's Event History grid is updated.

Deactivating Access for a Contact

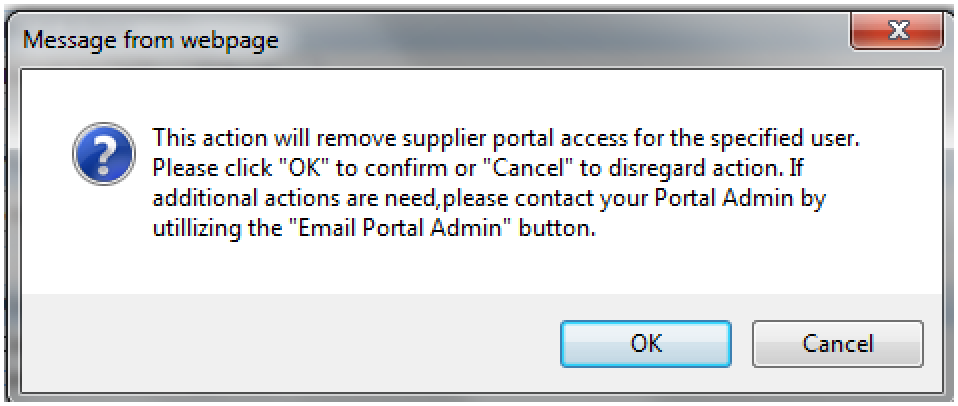
When the manager in Supplier Portal deactivates a Supplier Portal user's portal access, the User Status Change window is displayed.

Figure 6–6 User Status Change window



Enter comments in the Your Comments field (required), and then click **Submit**. The following confirmation window displays:

Figure 6–7 Deactivation message



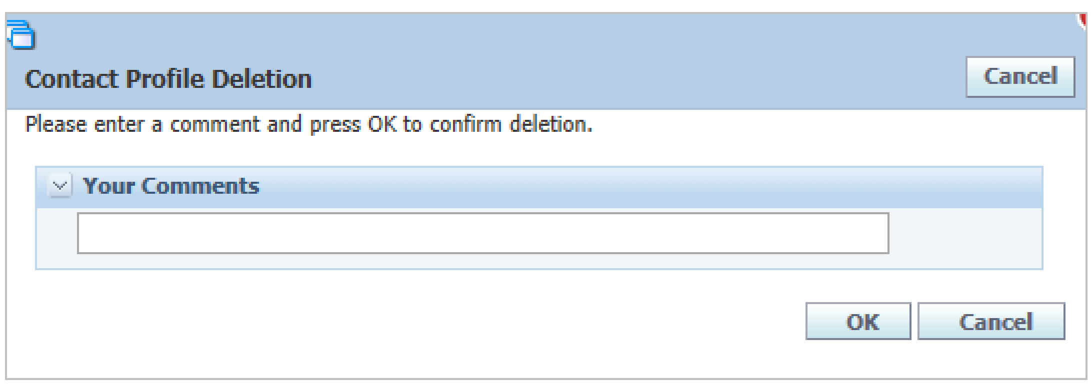
When the user clicks **OK**:

- If the user is only associated to company and/or facilities that are also associated to Supplier Manager in context, Portal Status is set to “Deactivated”, and all “User Access” checkboxes are unchecked.
- If the user is associated to other company and/or facilities that are not associated to Supplier Manager in context, Portal Status should remain “Approved”, and all “User Access” checkboxes associated with the Supplier Manager in context are unchecked.
- The contact profile's Event History grid is updated.
- An email is sent to the appropriate Supplier Portal Admin.

Deleting a Contact

A window displays prompting you to enter comments (required). Click **OK** to confirm the deletion.

Figure 6–8 Contact Profile Deletion window



This action:

- Removes the appropriate company or facility associations from the contact profile.
- Notifies the Supplier Portal Admin via email.

- Logs the deletion in the Event History table of the contact profile.

Note: The delete action is false by default. It is controlled by the following configuration:

```
<add
key="SP.ManagerContactPortalAccessDeleter.Enabled"
value="false" configDescription="When set to 'true',
users with Supplier portal Manager site can delete
Contacts from Companies or Facilities, this could
lead to orphaned Contact Profiles."/>
```

7

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:

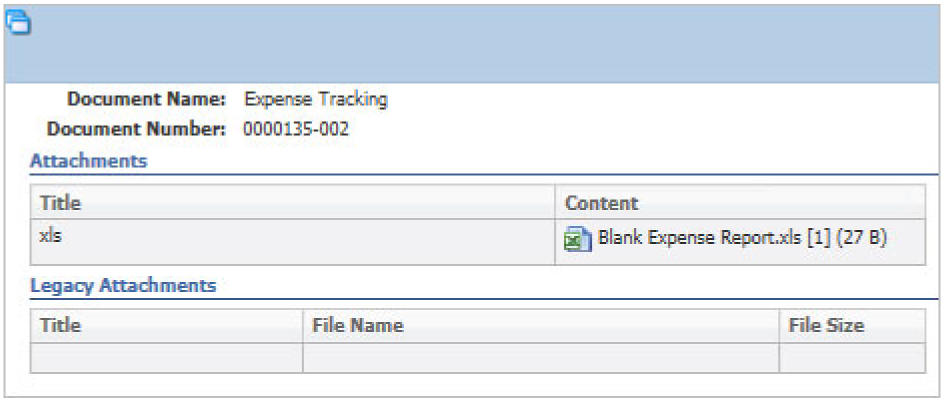
- The document belongs to a document catalog that is associated with the supplier's company, facility, or registrant profile, and
- The document is marked "Publish to Supplier Portal" in the DRL application

The supplier can view the DRL catalogs and the documents in the catalog by clicking the **Reference Library** link. Figure 7–1 displays the Reference Library page.

Figure 7–1 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 7–2.

Figure 7–2 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.

8

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

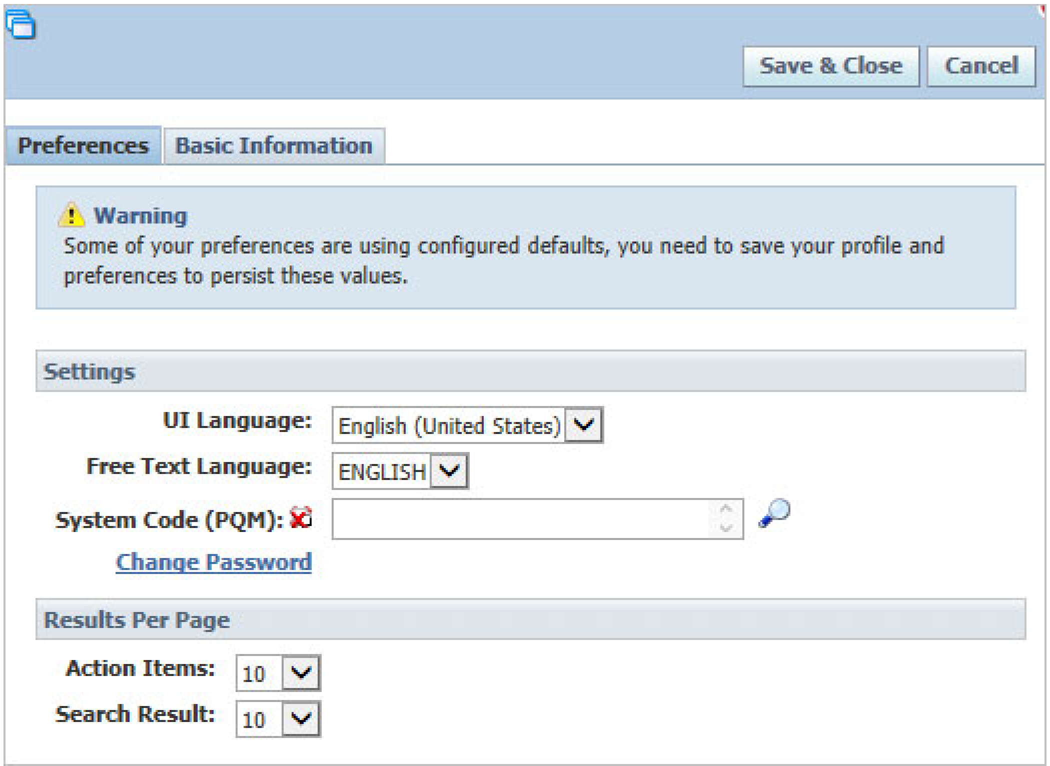
Defining your Profile and Preferences

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



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 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 the contact profile. 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

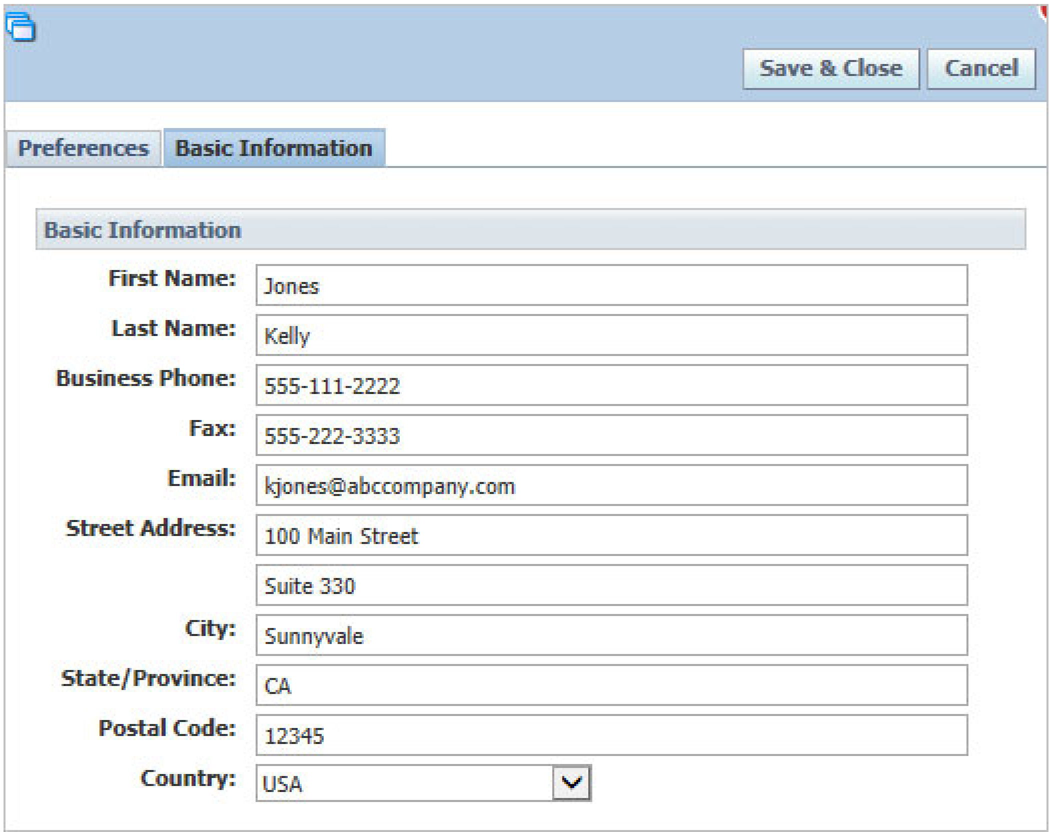
The Results Per Page section contains settings for Supplier PQM action items and search results.

- **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



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

Click **Save & Close** to save your changes.