PeopleSoft 8 Supplier Portal SP2 PeopleBook

PeopleSoft 8 Supplier Portal SP2 PeopleBook

SKU MAWVr8SP2B 1200

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

Copyright © 2001 by PeopleSoft, Inc. All rights reserved.

Printed in the United States of America.

All material contained in this documentation is proprietary and confidential to PeopleSoft, Inc., ("PeopleSoft") is protected by copyright laws, and subject to the nondisclosure provisions of the applicable PeopleSoft agreement. No part of this documentation may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, including, but not limited to, electronic, graphic, mechanical, photocopying, recording, or otherwise without the prior written permission of PeopleSoft.

This documentation is subject to change without notice, and PeopleSoft does not warrant that the material contained in this documentation is free of errors. Any errors found in this document should be reported to PeopleSoft in writing.

The copyrighted software that accompanies this documentation is licensed for use only in strict accordance with the applicable license agreement which should be read carefully as it governs the terms of use of the software and this documentation, including the use and disclosure thereof.

PeopleSoft, the PeopleSoft logo, PeopleTools, PS/nVision, PeopleCode, PeopleBooks, and Vantive are registered trademarks, and *PeopleTalk* and "People power the internet." are trademarks of PeopleSoft, Inc. All other company and product names may be trademarks of their respective owners.

Contents

About This PeopleBook

Before You Begin v
PeopleSoft Portals Application Fundamentals v
Related Documentation vi
Documentation on the Internet vi
Documentation on CD-ROM vi
Hardcopy Documentation vii
Typographical Conventions and Visual Cues vii
Page and Panel Introductory Table ix
Comments and Suggestions ix

Chapter 1

Introducing PeopleSoft Supplier Portal

Overview of PeopleSoft Supplier Portal 1-1
Supplier Portal Menu (Supplier Facing Pages) 1-2
PeopleSoft Supplier Portal Features 1-5
Supplier Portal Security 1-5
Homepage Pagelets and Features 1-5
Personalization 1-6
Integration With Other Software Vendors 1-6
Multinational Considerations 1-6
PeopleSoft Portal Technology 1-7
Portal Navigation 1-7
PeopleSoft Internet Architecture 1-7

Index

ABOUT THIS PEOPLEBOOK

This section describes information you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft Portal Solutions product line, how to order additional copies of our documentation, and so on.

The book provides you with the information that you need to implement and use PeopleSoft Supplier Portal. You can order the online version by requesting SKU PS8SP2r0, or the hard-copy version by requesting SKU MAWVr8SP2B 1200.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume that you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information that you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

PeopleSoft Portals Application Fundamentals

PeopleSoft Portals Application Fundamentals covers important topics that apply to many or all PeopleSoft applications across the PeopleSoft Portal Solutions product line. Whether you are implementing only PeopleSoft Supplier Portal, some combination of products within the product line (for example, PeopleSoft Customer Portal, Employee Portal, Enterprise Portal, Campus Portal, and Government Portal), or the entire PeopleSoft Portal Solutions, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as understanding and administering pagelets.

In the *PeopleSoft Portals Application Fundamentals* PeopleBook, we discuss common information pertinent to all applications in the PeopleSoft Portal Solutions product line. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Portals Application Fundamentals* and to other PeopleBooks.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www.peoplesoft.com). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection web site: http://www.peoplesoft.com/

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM PeopleSoft 8 Portal Solutions SP2 SKU PS8SP2r0.

Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

The CD includes the following PeopleBooks (presented in HTML format) that you can print in whole or in part:

- PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook
- PeopleSoft 8 Campus Portal SP2 PeopleBook
- PeopleSoft 8 Enterprise Portal SP2 PeopleBook
- PeopleSoft 8 Government Portal SP2 PeopleBook
- PeopleSoft 8 Customer Portal SP2 PeopleBook

- PeopleSoft 8 Employee Portal SP2 PeopleBook
- PeopleSoft 8 Supplier Portal SP2 PeopleBook
- PeopleSoft 8 Enterprise Integration SP2 PeopleBook
- Using PeopleBooks
- Using PeopleSoft Applications PeopleBook

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft internet site: http://www.peoplesoft.com/.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559.
Email	Email CPI at **callcenter@conpub.com**.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates a code example.
Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold).

Cross-references	The phrase "For more information" indicates where you can find additional documentation on the topic at hand. • Capitalized titles in *italics* indicate the title of another PeopleBook. For example: For more information about billing, see *PeopleSoft 8.00.01 Billing PeopleBook.* • Capitalized titles in *italics* followed by chapter title in quotes refer to a chapter in another PeopleBook. For example: For more information about establishing rate templates, see *PeopleSoft 8.00.01 Projects PeopleBook,* "Integrating With PeopleSoft Billing and PeopleSoft Contracts". • Capitalized titles in quotes refer to another chapter of this PeopleBook. For example: For more information about contract status security, see "Securing Your PeopleSoft Contracts System". • Capitalized titles refer to sections within this chapter of this PeopleBook. For example: For more information about Defining Contract Statuses, see Defining Your Own Contract Statuses.
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0,* not the letter *O.*
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.

Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates For more information cross-references to related or additional information.

Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page and Panel Introductory Table

In the documentation, each page or panel description in the application includes an introductory table with pertinent information about the page. Not all of the information will be available for all pages or panels.

Usage	Describes how you would use the page, panel, or process.
Object Name	Gives the system name of the page, panel, or process as specified in PeopleTools Application Designer. For example, the Object Name of the Detail Calendar page is DETAIL_CALENDAR1.
Navigation	Provides the path for accessing the page, panel, or process.
Prerequisites	Specifies which objects must have been defined before you use the page, panel, or process.
Access Requirements	Specifies the keys and other information necessary to access the page or panel. For example, **SetID** and **Calendar ID** are required to open the Detail Calendar page.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed, about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Supplier Portal Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

Introducing PeopleSoft Supplier Portal

PeopleSoft Supplier Portal leverages a set of technologies that exploit the internet and enable strategic trading partners to link business processes in a way that could not be done with conventional technologies such as EDI or client/server networks. PeopleSoft Supplier Portal makes available strategic information in real-time at no or very low cost to suppliers, improving the business relationship, supplier response capability, and employee productivity.

Overview of PeopleSoft Supplier Portal

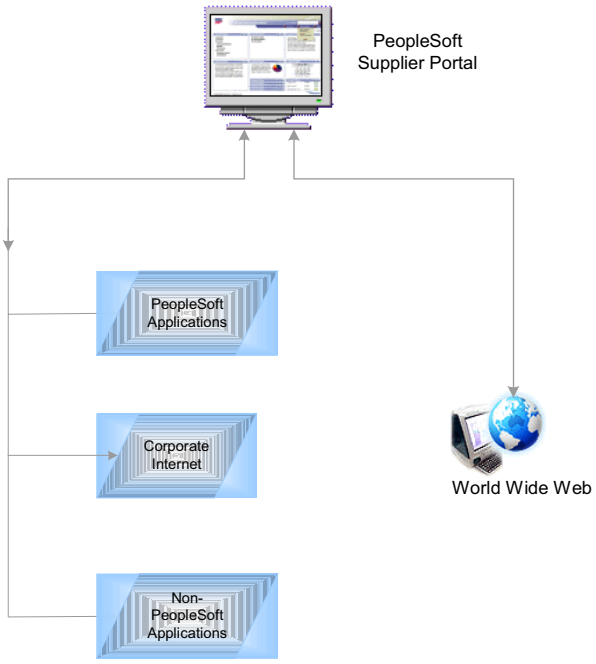
Buyers and sellers can use PeopleSoft Supplier Portal to work interactively, sharing the same views of data across the internet and dramatically improving the efficiency of your supply chain.

Your suppliers can share the same views of data that are available to the employee/buyer, such as order information and status, product design, and replenishment information. This enables your suppliers to make decisions about everyday tasks (such as reorder point shipments) and make inquiries online (such as invoice payments) without the direct involvement of the buyer. Buyers avoid spending time ensuring that suppliers have the most current information at any point in time. Your purchasing organization spends more time on strategic issues and operates with greater efficiency. The results are better, faster, and more accurate decisions that are made with less effort.

PeopleSoft Supplier Portal enables you to share real-time engineering data across the boundaries of your organization, reducing the time-to-market for new products and the time involved in design modification of out-sourced products. When suppliers' engineers work in real time with the customer, regardless of physical locations, customers can be involved early in the design process and provide vital input during every step of the design process. Design errors can be reduced and the time-to-production for new or modified final designs can be shortened.

Your suppliers can use PeopleSoft Supplier Portal to access multiple products and applications with a single user logon ID. Individual users can personalize their homepages and find information that's relevant to their roles within their own companies, creating a collaborative supply chain. PeopleSoft Supplier Portal offers browser-based, real-time access to information that your suppliers need.

PeopleSoft Supplier Portal is a separate application that functions as a single point-of-entry to PeopleSoft products and non-PeopleSoft applications alike, as well as to content on a corporate intranet and the web. The following diagram illustrates these relationships:

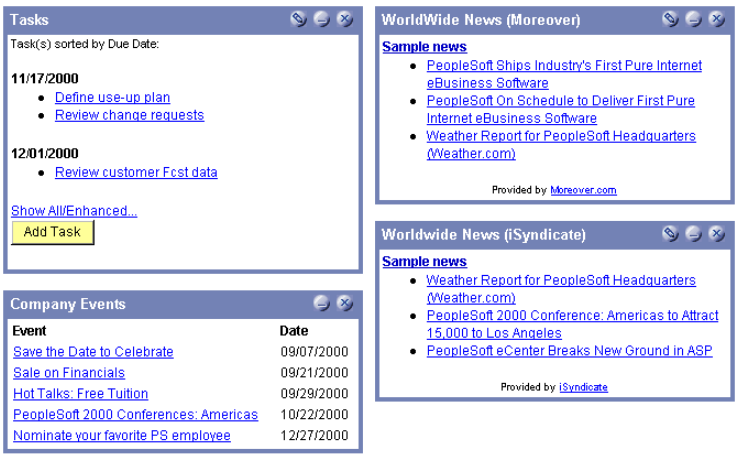


PeopleSoft Supplier Portal

Using PeopleSoft Supplier Portal, your suppliers can access PeopleSoft self-service transactions, which are tightly integrated with your internal PeopleSoft applications and enable real-time supplier collaboration, lookups, and exception-based processing. PeopleSoft Supplier Portal can provide a highly integrated solution for improving the service levels of your suppliers and partners.

Supplier Portal Menu (Supplier Facing Pages)

PeopleSoft Supplier Portal applications are deployed based on supplier permission lists, roles, and role users, which you define. PeopleSoft Supplier Portal comes with a set of example roles and permission lists, which you can use as a starting point. In addition, the generic user SUPPLIER is provided, containing some or all of the menu items discussed below (depending on PeopleSoft products you have purchased).



Sample PeopleSoft Supplier Portal menus

Depending on your deployment, the PeopleSoft Supplier Portal menu may include the following:

My Information

Users can update their user profiles, reducing your need to maintain suppliers' user information, including email addresses and passwords. Users can also designate alternate users to receive routings in their absence.

For more information about user profiles on PeopleSoft Supplier Portal, see My Profile.

Supplier Setup (eSupplier Collaboration)

Your suppliers can give their own employees appropriate role-related access to PeopleSoft Supplier Portal. You retain secure control over the roles, pages, and data that your suppliers have permission to authorize. With appropriate access, suppliers' users can maintain address and contact information, vastly diminishing your maintenance burden.

For more information about supplier setup, see Creating and Updating Vendor Information and Self Service Security for Vendors.

Product Development (eProduct Management)

In environments where outsourcing is required, PeopleSoft eProduct Management enables your suppliers to collaborate in real time on product designs (such as structures and design documents). PeopleSoft eProduct Management includes bill-of-material lookups, supplier-

based engineering change requests, and access to engineering change orders (ECOs), including workflow approval processing for supplier-based ECO approvals.

For more information about product development, see Vendor Viewing Bills of Material, Vendor Viewing Engineering Change Requests: View, Add, or Update, and Vendor Viewing Engineering Change Orders/Workflow.

Supplier Orders (eSupplier Collaboration)

Suppliers can review their orders, payments, schedules, invoices, account balances, and receipts, thereby reducing phone inquiries and associated costs. Their access is securely limited to data that reflects their respective transactions with you by PeopleSoft self-service security.

For more information about Supplier Orders, see Reviewing Activity. For more information about self-service security, see Self Service Security for Vendors.

Supplier Replenishment (eSupplier Replenishment)

In environments where suppliers are actively managing your inventory levels, suppliers can view up-to-the-minute quantity information for consigned inventory. In flow-based environments, suppliers can access real-time Kanban replenishment requests to review requested quantities as well as historical receipt information.

For more information about supplier replenishment, see Reviewing Kanban Requests and Reviewing Inventory Quantity Balances.

Submit Portal Content

Suppliers can submit content for the menu, company events, and company news. The Menu Item feature enables individual users to submit menu items for file attachments, web pages, and internal pages.

The Company News pagelet and the Company Events pagelet enable suppliers to publish articles of common interest on PeopleSoft Supplier Portal.

For more information about submitting portal content, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Submitting and Managing Menu Items"**, ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Using the Company News Pagelet"**, and ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Using the Company Events Pagelet"**.

The PeopleSoft Supplier Portal menu may also display links to portal administration and PeopleTools, depending on the user's assigned permissions.

PeopleSoft Supplier Portal Features

This section introduces you to some general features of PeopleSoft Supplier Portal that enable suppliers to participate in your supply chain.

Supplier Portal Security

PeopleSoft Supplier Portal includes a newly designed security architecture that enables you to restrict access for each supplier to only the information pertinent to the specific supplier. In addition, when using PeopleSoft eSupplier Collaboration you can choose to provide a distributed security maintenance to your supplier by using function-related supplier roles so that your suppliers can maintain their own users, saving everyone time and effort. Suppliers' access can be tailored to their roles within their own companies.

For more information about PeopleSoft Supplier Portal security, see Self Service Security for Vendors and ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Understanding Information Architecture"**.

Homepage Pagelets and Features

PeopleSoft Supplier Portal includes enterprise-wide information architecture and various pagelets with content that users can add, remove, and rearrange to create their own homepages.

PeopleSoft Supplier Portal enables each user to choose from a variety of preconfigured pagelets. You can also choose to design your own supplier-facing pagelets.

For more information about designing your own pagelets, see ***PeopleSoft 8 Portals Application Fundamentals SP2 PeopleBook,*** **"Using Content From the Internet"** and Developing Pagelets.

These pagelets display information within a small rectangular area on the homepage. PeopleSoft Supplier Portal is delivered with PeopleSoft Enterprise Portal, which in turn delivers the following preconfigured pagelets:

- **Company News**
- **Company Events**
- **Integrated Tasks List**

- **External Content**
- **E-mail and Calendar Integration**
- **Menu Request**
- **Web Publishing**

You can make any or all of the preconfigured pagelets available to your users to incorporate in their homepages.

Personalization

User interaction with PeopleSoft Supplier Portal takes place within a personalized homepage. Users can select from a list of registered homepage pagelets that display summarized information within a small rectangular area on the homepage.

Users can add, remove, and rearrange blocks of content to create and personalize their own homepages. PeopleSoft Supplier Portal makes it simple to display all the corporate tools and internet services that are used most, and users can display information that is relevant to their specific tasks.

Depending upon your deployment, users can personalize their homepages by:

- **Viewing External News**.
- **Looking at the Integrated Task List Pagelet**.
- **Using Third-Party Email and Calendar Events**.
- **Using the Company Events Pagelet**.
- **Understanding the Saved Searches Pagelet**.

Integration With Other Software Vendors

Because of its open web architecture, PeopleSoft Supplier Portal can aggregate all web content for its users, including the content of competitors' web-based products. PeopleSoft has teamed with a systems-integration vendor and an enterprise application integration (EAI) vendor to provide a complete portal solution.

Multinational Considerations

PeopleSoft Supplier Portal is translated into all the languages that PeopleSoft supports. The applications and content appear in your preferred language. If you're a casual user or guest who navigates to a homepage, you have the option to select your preferred language. Once you're officially logged in as a supplier, you're presented with information in the language designated in your profile.

The enterprise-wide information architecture is also translated into all the languages that PeopleSoft supports. The translation includes the following elements:

- Category descriptions.
- Keywords.
- Descriptions of related information links.

PeopleSoft Portal Technology

PeopleSoft Enterprise Portal tools and architecture are the basis of PeopleSoft Supplier Portal. This collection of technologies includes the portal registry, the page assembler, personalization, the search engine, and navigation.

For more information about portal technology, see Portal Technology.

Portal Navigation

Navigation of the portal is based on homepage pagelets provided by PeopleTools Portal. These are hierarchy navigation pages, breadcrumbs, favorites, and search pagelets.

For more information about portal navigation, see Using Portal Navigation Features.

PeopleSoft Internet Architecture

The internet Application Server layer is at the center of the PeopleSoft Internet Architecture. It consists of the web server and application server components. The portal servlet and the portal processor are the main components of the portal architecture.

For more information about PeopleSoft Internet Architecture, see Introducing the PeopleSoft Portal and Understanding the Portal Servlet.

Index

A

About This PeopleBook
  before you begin i
  portals application fundamentals i
  related documentation ii
architecture
  internet 1-7

C

CD-ROM
  ordering ii
company events 1-4
company news 1-4
consigned inventory 1-4
content
  managing 1-4

E

eProduct Management 1-3
eSupplier Collaboration 1-3, 1-4
eSupplier Replenishment 1-4

G

globalization 1-6

H

home page pagelets and features 1-5

I

integration with other software vendors 1-6

K

Kanban replenishment requests 1-4

L

language 1-6

M

multinational considerations 1-6

N

navigation 1-7

O

outsourcing 1-3
overview 1-1

P

page assembler 1-7
pagelets 1-5
PeopleBooks
  CD-ROM, ordering ii
  printed, ordering iii
permission lists 1-2
personalization 1-6, 1-7
portal administration 1-4
portal navigation 1-7
portal registry 1-7
portal technology 1-7

R

role users 1-2
roles 1-2

S

security 1-5
supplier facing pages 1-2
suppliers
  alternate users 1-3
  defining in the portal 1-2
  maintaining user profiles 1-3
  reviewing data 1-4
  security 1-3, 1-4, 1-5

U

user profiles
suppliers 1-3