Oracle12 iSupplier Portal
External User Guide
Introduction & General Info

Last Update: 10/01/2019

Chapter Objectives:

- o Understand how iSupplier Portal is used between suppliers and Daikin Applied America (DAA)
- o Home Page
- o Log into iSupplier Portal and set email preferences
- o Navigate through the iSupplier Portal
- o Searching and Exporting Data

Estimated Lesson Time: 20 minutes

While navigation and access to data is intended to be easy within iSupplier, questions on how to access certain data types and screens may arise. This document was created to provide our suppliers with general information about how the iSupplier Portal works and how to navigate its numerous pages. In reading and following this guide with its various screenshots, examples, and step-by-step instructions a supplier will be better able to accomplish commonly used tasks.

As more features are added and endorsed by DAA in the iSupplier portal, updated guides and information will be provided.

Overview and Benefits

Oracle iSupplier Portal is a communication tool that enables DAA and its suppliers to communicate with each other throughout the procure-to-pay process. It allows suppliers to view and manage purchase orders, receipts, invoices and delivery schedules in a real-time system that is available 24 hours a day, 7 days a week (24x7).

The DAA iSupplier Portal provides an electronic link between suppliers and DAA, which allows online communication of procure-to-Pay data.

iSupplier Portal leverages an approval process for changes and provides everyone with the same information, resulting in communication efficiency and accuracy.

Benefits:

Benefits associated with using iSupplier include:

1)   Offers suppliers an integrated experience by providing access to purchase orders (POs), invoices and payments in one location.

2)   Improved efficiency by decreasing the number of calls between suppliers and DAA Accounts Payables and Buyers.

3)   Provides a central location for all PO information and gives suppliers access to historical PO information.

4)   Eliminates mail float. When invoices are received and entered into DAA system, suppliers will be able to view and track the status of invoices till payment

5)   Enhances the visibility of the transactions that occur between DAA and its suppliers.

Information Found

The iSupplier Portal contains information that is relevant to a supplier.

Order Information: Allows viewing and responding to order related documents, such as POs and supplier agreements like Blanket Purchase Agreements (BPAs).

Shipping Information: Allows tracking shipments. In future phases, creating advanced shipment notices (ASN) will be rolled out.

Planning and Item Information: Allows accessing planning and item information, allows maintaining item information

Invoice and Payment information: Allows accessing invoice and payment information and status

Self-Service Supplier Profile Management: Allows suppliers to manage key profile details used to establish or maintain a business relationship with DAA.

Key profile details covered are

- General Supplier details
- Contact Directory
- Business classifications
- Products
- User Accounts

Supplier Roles and Responsibilities

Each supplier user role has different responsibilities. The roles and responsibilities of a supplier include

Daikin iSupplier User: This is general supplier user role who is responsible for viewing and processing purchase orders. This role can view other order related transactions, such as receipts, deliveries, invoices and payments status.

Daikin iSupplier Profile Admin: Supplier administrator users are responsible for maintaining their supplier profile data including contacts and user accounts.

LOG IN PAGE

Navigate to the URL that is provided by DAA

https://SupplierPortal.daikinapplied.com

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

LOG INTO ISUPPLIER

To	
Sent	**09-OCT-2019 15:23:20**
ID	**95144683**

You have been registered at Daikin Applied Americas Inc. for access to their supplier collaboration network. You can log on with the username   and the password lw9:916E3.

When you first log on, you will be required to change your password for security purposes. Contact administrator for additional information.

Daikin Applied iSupplier Portal Access Terms of Use By logging in to Daikin Applied's iSupplier Portal, you acknowledge and agree that when you access Daikin Applied's iSupplier Portal our Terms of Use and Privacy Policy apply. By logging in to Daikin Applied's iSupplier Portal, you also acknowledge and agree that Daikin Applied's Terms and Conditions of Purchase "PO Terms and Conditions" apply to all Purchase Orders, unless a fully-executed Master Supply Agreement is current and on file ("MSA") with Daikin Applied. In the event of conflict, the terms in the MSA will govern.

Thank you.

DAIKIN

iSupplier Portal Homepage

The iSupplier Portal Homepage will look like the screen shot below, consisting of several elements to aid in "At A Glance" reviews and various arrays of buttons/links to aid in navigating the portal.

The homepage consists of the following elements:

See 1 above - Global Buttons – Home, Logout, Preferences, and Help.

- o Home   – Returns the user to the main portal where they can select another responsibility or application.
- o Logout   – Logs the user out of DAA's Oracle iSupplier Portal
- o Preferences –   Displays the users Preferences page (time zone, password, etc)
- o Help –   Access Oracle's help index page.

See 2 above - Tabs – Provides easy navigation by grouping the common areas of iSupplier into various categories.

See 3 above - Search Field – Allows the user to enter a document number and search for purchase orders, releases, invoices, and shipment notices.

See 4 above - Quick Links – Displays a typical procure-to-pay flow of Oracle's iSupplier Portal. Clicking on any of these links will directly load the corresponding page.
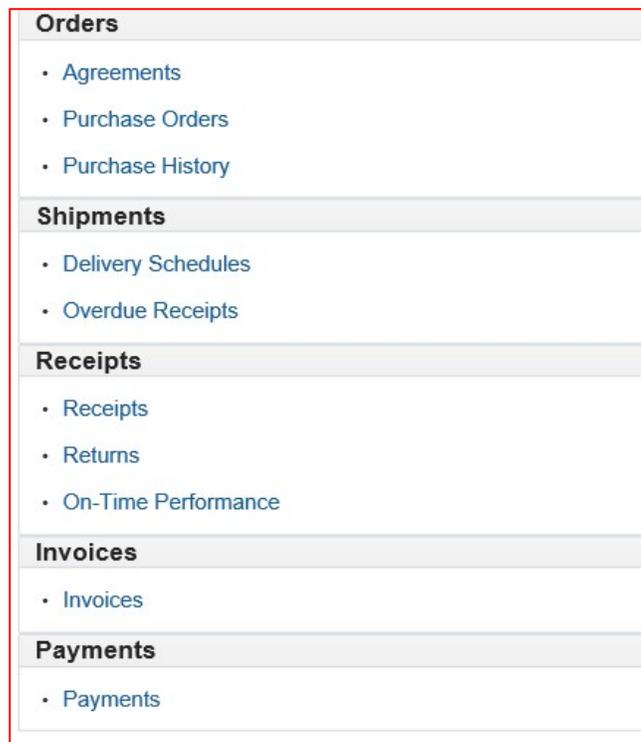
See 5 above - Notifications – Notifications are messages waiting for supplier users to review. Some notifications are view only, while other notifications require an action from the user. Clicking on a notifications subject line will open the "Notifications Details" page displaying the complete notification details as well as any action buttons.

See 6 above - Orders at a Glance – This section will display the five most recent purchase orders/releases issued to the supplier. Clicking on a PO Number will open and display the purchase order/release details.

See 7 above - Shipments at a Glance – This section will display 5 most recent shipments. Click on a shipment number to view the details of a recent shipment.

User Preferences

User Preferences

Users can change settings or preferences at any time using the Global Button "Preferences" in the upper right hand corner of the screen. The various preferences that can be changed are:

• General – Language, Territory, Time Zone, Client Character Encoding, and Accessibility features. *(Note: Date and time values are always displayed in the users preferences even if DAA is in a different time zone.)*

• Notification – Select how notifications are to be received in e-mail. Select HTML mail with attachments.

• Formatting – Define how the date/time and numbers are presented in the user account.

• Password – Reset or change the user account password. *(A valid password must be at least eight but not more than 30 characters. Passwords can be numeric, alphanumeric, or special characters.)*

To save changes that have been made, select the "Apply" button towards the right hand of the screen located near the top or bottom of the page. To discard changes, select "Cancel."

Searching

The iSupplier Portal provides various locations to search for documents. Throughout these various fields and pages common rules apply when looking for either a specific document or a list of documents. Some common search fields include PO Number, Invoice Number, Payment Number, Date(s), and Status. When searching, make note that several fields are case sensitive.

Another important search function is use of Oracle's wildcard "%" to search for generic items. For example, to search for all orders beginning with 20009 and ending in 5, a user would need to enter 20009%5 in the search field. It is important to know that the "%" does not control the number of characters in the search results, meaning it may show 200095, or 2000915 as possible results.

Simple Search

To aid the user when entering search criteria, Oracle provides icons next to fields that require special formatting or the use of a predefined list of values from within Oracle. These icons consist of a calendar, flashlight, and quick select.

Calendar – A " " icon may appear next to a date field. If so, clicking on this icon will open a pop-up window displaying a calendar. Clicking on a specific day on this calendar will close the window and enter the selected date into the search field. *Note: Date formats, unless altered by the user, will default to DD-MON-YYYY (01-JAN-*2019*).*

Glass – A " " icon may appear next to various search fields. This icon represents the use of a value that has been predefined or entered into Oracle already. Examples of this may be a Buyers name, a ship-to location, or an item number. Clicking on this icon will open a pop-up window displaying a list of predefined values. Entering "%" in the search field and selecting "Go" will list all of the available values for the field.

Quick Select – A " " icon may be displayed when viewing lists of values within Oracle. Clicking on this icon will select the value to the right of the icon, close the popup window, and enter the value in the search field automatically.

When using either a simple search or advanced search, enter the various search criteria needed to perform the query in the various fields and select "Go." Results, if available, will be displayed below the search fields populating various columns with data. If no results are available, the text "No results found" will appear in the search results portion of the page.

Advanced Search

Specify parameters and values to filter the data that is displayed in your results set.

			Views

Match ⦿ All ○ Any

PO Number	is	▾		
Document Type	is	▾	🔍	
Order Date	is	▾	(19-Sep-2019) 📅	
Buyer	is	▾	🔍	

Go Clear   Add Another Acknowledgement Status ▾ Add

Select Order: Acknowledge | Request Cancellation | Request Changes | View Change History | | ▣ ↻   ◂ Previous 1-25 ▾ Next 25 ▸

	PO Number △	Rev	Operating Unit	Document Type	Description	Order Date △	Buyer	Currency	Amount	Status	Change Request Status	Acknowledge By	Terms & Conditions / Attachments
○	1177577	0		Standard PO		30-Sep-2019 16:07:31		USD		Accepted		01-Oct-2019 15:40:32	📎
○	1177576	1		Standard PO		30-Sep-2019 15:40:32		USD		Requires Acknowledgment		01-Oct-2019 15:40:32	📎
○	1177555	2		Standard PO		26-Sep-2019 10:06:46		USD		Accepted		28-Sep-2019 00:00:00	📎

Note: If more than one page of search results is available, navigation links will appear on the upper right hand of the search results.

◂ Previous   1-25 ▾   Next 25 ▸

Sorting:

To change the way search results, or other information, are sorted click on the column heading that needs to be adjusted. The page will reload with the data sorted. Click on the same column heading a second time to reverse the sort order. *Note: As shown below column headings with "sort" symbol only can be sorted.*

Select Order: Acknowledge | Request Cancellation | Request Changes | View Change History | | ▣ ↻   ◂ Previ

PO Number △	Rev	Operating Unit	Document Type	Description	Order Date △	Buyer	Currency	Amount	Status	Change Request Status	Acknowledge

Exporting Data

iSupplier offers the ability to export data from several locations into a .CSV (Comma Separated Value) file. Once exported, the file can be viewed by several programs providing the ability to filter, sort, or even upload the data to other applications.

While navigating through iSupplier, screens such as Order Details, Invoice Summary, Purchase Order History (and others) may include an option to Export (**Export**) the current data. Clicking on the "Export" button will take the information on the screen and create a file named "Export.csv" to download. The user will be prompted to either save or open the file. For this example, select "Open."

Do you want to open or save **export.tsv** from   ?   Open   Save ▼   Cancel   X