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Instructor Manual
iSupplier Portal

iSupplier Portal

Revised on 9/19/2019

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iSupplier Portal

iSupplier Portal

Oracle "iSupplier Portal Full Access" is a collaborative application that enables Cree Lighting and its suppliers to communicate with each other. It enables suppliers to have real-time access to information and respond to Cree Lighting with order acknowledgments, change requests, and shipment notices.

It also allows Cree Lighting to view orders, shipments, receipts, invoices, and payment information across all suppliers and all Cree Lighting business units that are using Oracle R12.

Cree Lighting intends for Suppliers to use Oracle "iSupplier Portal Full Access" for these functions:

- Submit order acknowledgments
- Submit change requests on purchasing documents
- Submit advance shipment and/or billing notices
- View and print purchasing documents: Blanket Purchase Agreements, Contract Purchase Agreements, Blanket Releases and Standard Purchase Orders
- View status of receipts, invoices and payments

Cree Lighting will register and provide training to the supplier for using the Portal. A Cree Lighting representative will tell you the access that you will use when doing business with us.

- iSupplier Portal Full Access used for viewing and responding to transactional documents (this training)
- Sourcing Supplier used to participate in a Cree Lighting sponsored Request for Quote event
- Supply Chain Collaboration Planner used for CVMI - Consigned and Vendor Managed Inventory and Forecast

Upon completion of this module, you will be able to:

- Access the Portal
- Navigate and search
- View and manage order information
- View and manage shipping information
- Submit and view invoice and payment information

System Requirements:

- PC with internet connection with minimum speed of 256 KBPS (high-speed or broadband preferred)
- Internet Explorer version 5.5 or higher
- Web-proxy/firewall needs to be open to allow access to Port 8000

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iSupplier Portal Use and Registration

Cree Lighting will register and provide training to the supplier for using the Portal. There are three portals available and each will have a separate training document. A Cree Lighting representative will tell you the access that you will use when doing business with us.

- iSupplier Portal Full Access used for viewing and responding to transactional documents (this training)
- Sourcing Supplier used to participate in a Cree Lighting sponsored Request for Quote event
- Supply Chain Collaboration Planner used for CVMI - Consigned and Vendor Managed Inventory and Forecast

This section will cover the following topics:
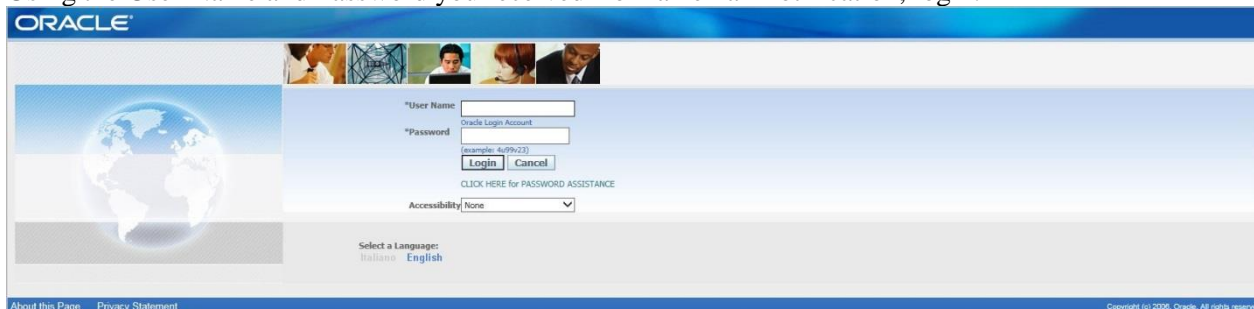
- URL web link to Cree Lighting Supplier Portal and login information will be sent to supplier in Email
- Logging on and setting up supplier password

Registration

iSupplier Registration
Supplier users will receive a registration email that provides the link (log on) to the portal and the *User Name and *Password.

Using the User Name and Password you received from an email notification, login.

The system will immediately ask you to change your password.

Once you have signed into the portal, there will be different responsibilities on the home page. You will choose the responsibility based on what information you want to view.

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Below is a description of the possible responsibilities that will be assigned to your username.

iSupplier Portal Full Access – Use this responsibility to see all purchase order information (current and history); view Delivery Schedules, Overdue Receipts, and enter ASNs; View Receipts, Returns, View Invoices, and Payments.

Sourcing Supplier - Use this menu if you have been invited to submit a request for quote. Please see this training for details.

Click on the "iSupplier Portal Full Access" menu link.

Home Page

iSupplier Portal Home Page

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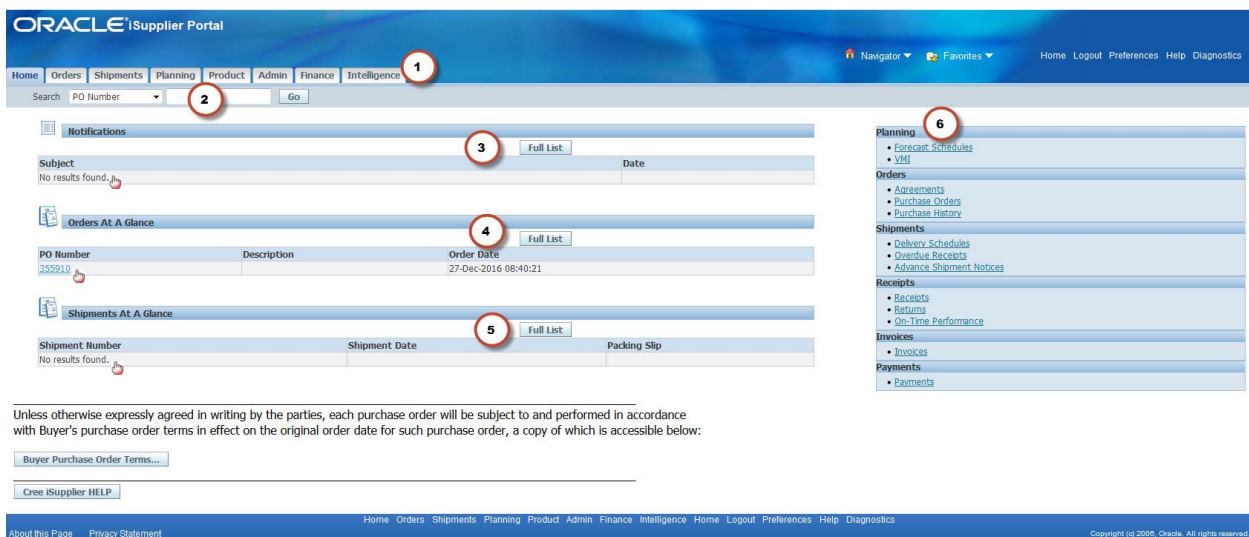
Home Page Tabs (1)
You can use the tabs on the home page to quickly access related task areas. For example, by clicking on the Tab "Orders" it will open the purchase order

Quick Search (2)
The Quick Search feature is available to you from the Home page. Using Quick Search, you can look for *Purchase orders *Shipments *Invoices *Payments - by selecting the type from pull down menu and entering the document number and clicking go.

Notifications (3)
Notifications are messages waiting for your review. Some notifications are view-only, while other notifications require action. To view your notifications, click the "Full List" button to open the Notification Details page. This page provides complete notification details, as well as the appropriate action button.

Orders at a Glance (4)
This section displays the five most recent purchase orders. Click the "Full List" button to view the purchase order details page.

Shipments at a Glance (5)
This section displays recent shipments. Click a shipment number to view a list of your recent shipments. To view a complete list of your Shipments, click the "Full List" button.

Quick Links (6)
This section is displayed on the right and provides a high-level diagram of the procure-to-pay flow through the Oracle iSupplier Portal application. Click any link to go directly to the corresponding page.

Hyperlinks ( )
You may click on any blue underlined number or word hyperlink to access detailed information about that transaction.

Viewing Order Information

Order Information includes content about viewing purchase orders, and submitting change requests. Upon completion of this lesson, you will be able to:

- View purchase orders.
- Submit change requests.
- Cancel orders or shipments.
- Manage deliveries.

Viewing Purchase Orders

When Cree Lighting enters a purchase order in Oracle Purchasing, the purchase order details are available to you in the Oracle iSupplier Portal.

You can view details of a purchase order such as terms and conditions, lines, shipments, and attachments from the Purchase Order Details page.

Procedure

Suppliers can see all purchasing documents sent from any Cree Lighting site using Oracle R12. In this topic, you will learn how to view a purchase order.

Step	Action
1.	Begin by navigating to the Search page for querying a purchase order. Click the iSupplier Portal Full Access Cree iSupplier Portal Full Access link.

Step	Action
2.	Click in the PO Number _____ field.
3.	Enter the desired information into the PO Number field then click the Go button.
4.	Click the PO Number link.
5.	The Purchase Orders page shows you detailed information about the purchase order, including both header and line information. The Order Information Section Show's general information, terms and conditions, ship-to (for non-complex work purchase orders), work location (for complex-work purchase orders) and bill-to information.
6.	In Summary, you can view the total amount of the purchase order, amount for the items of the purchase order that have been received, amount for the items on the purchase order that have been invoiced and status of the invoices against the PO.
7.	Click the Select to Show Information + Show link.
8.	This topic demonstrated how to view the Purchase Order document. End of Procedure.

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Responding to Purchase Order Acknowledgements

Acknowledging Purchase Orders
From the Orders tab, you may acknowledge a purchase order. PO acknowledgement functionality will be used for Blanket Purchase Agreements (BPA), BPA-Releases, and Standard Purchase Orders in iSupplier portal.

You acknowledge purchase orders to communicate to Cree Lighting that you have received, reviewed the details of, and accepted or rejected a purchase order. You can also communicate changes to the purchase order during acknowledgment. You can either acknowledge the order online, or accept or reject the order using the notification. The notification does not allow shipment level acknowledgment, which must be entered online. When you respond, the purchase order is automatically updated, and a notice is sent to the buyer and stored in the document history.

Below is an example of the notification that will be sent to your email address and will be available in the notification page of the iSupplier Portal.
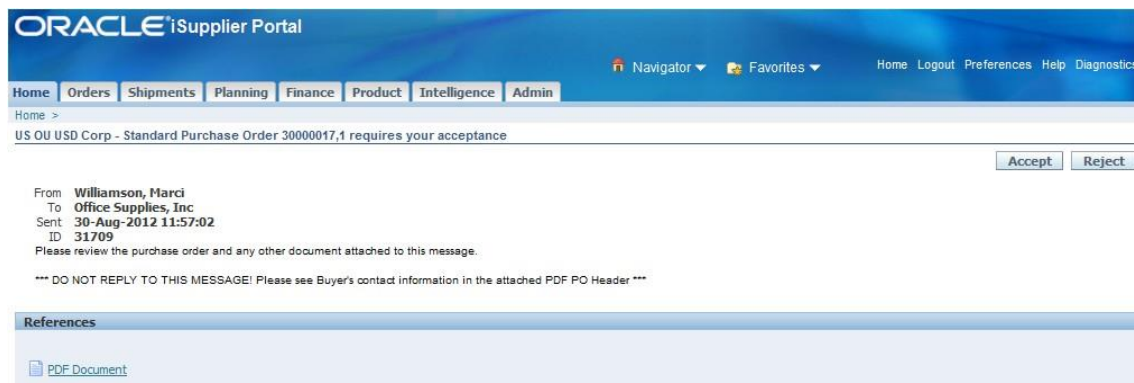
Procedure

In this topic, you will learn how to acknowledge the Purchase Order in the Portal.

Step	Action
1.	Click the Orders [Orders] link.
2.	The system makes a note in the "Status" column that orders need to be acknowledged. Select the Purchase Order document by clicking the radio [◉] button.
3.	If you need to acknowledge several Purchasing Documents use the Multiple PO Change button at the bottom right. For this example, just one document is selected. Click the Acknowledge [Acknowledge] button.
4.	Click the Show [⊞ Show] link or the Show All Details [Show All Details] link to see the line and shipment level information.

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5.	Click the Accept Entire Order Accept Entire Order button to accept the document as is. If you need to make any changes you can return to the Order tab and select Change Order
6.	Click in the Note to Buyer [ ] field.
7.	Enter the desired information into the Note to Buyer field.
8.	Click the Submit Submit button.
9.	The page will display confirmation that the acknowledgement was successful. Click the Orders Orders tab.
10.	Notice that the status of the Purchase Order is now "Accepted". The buyer will receive an email stating the purchase order has been accepted. This topic demonstrated how to acknowledge the Purchase Order in the Portal. End of Procedure.

Submitting Change Requests

The Oracle iSupplier Portal enables you to request changes to purchase orders when modifications are needed to fulfill an order. You can make changes during and after acknowledgment. You can change a single purchase order, or (depending on the change you need to make) you can update multiple change orders at the same time.

Procedure

In this topic, you will learn how to submit a change request.

Step	Action
1.	Navigate to the iSupplier Portal home page. Click the iSupplier Portal Full Access Cree iSupplier Portal Full Access link.
2.	The Supplier Collaboration home page enables you to search, view, and edit purchase orders.

Step	Action
3.	Click in the PO Number [ ] field.
4.	Enter the desired information into the PO Number field.
5.	Click the Go [Go] button.
6.	The Purchase Orders page enables you to select, view, and modify a purchase order.
7.	Click the PO Number link.
8.	The Standard Purchase Order page enables you to view details of your purchase order and request changes if required.
9.	Click the Actions [Request Changes ▼] list.
10.	Click the Go [Go] button.
11.	Click in the Supplier Order Number [ ] field.
12.	Enter the desired information into the Supplier Order Number field.
13.	Click the Select to show information [+] Show link.
14.	Click in the Promise Date [30-Dec-2016 15:25] field.
15.	Click the Promise Date [▦] link.

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16.	Click the promise date.
17.	Click in the Reason [ ] field.
18.	Enter the desired information into the Reason field.
19.	Click the Action [▼] list.
20.	Select the Change [Change ▼] list item.
21.	Click the Submit [Submit] button.
22.	This topic demonstrated how to submit a change request. End of Procedure.
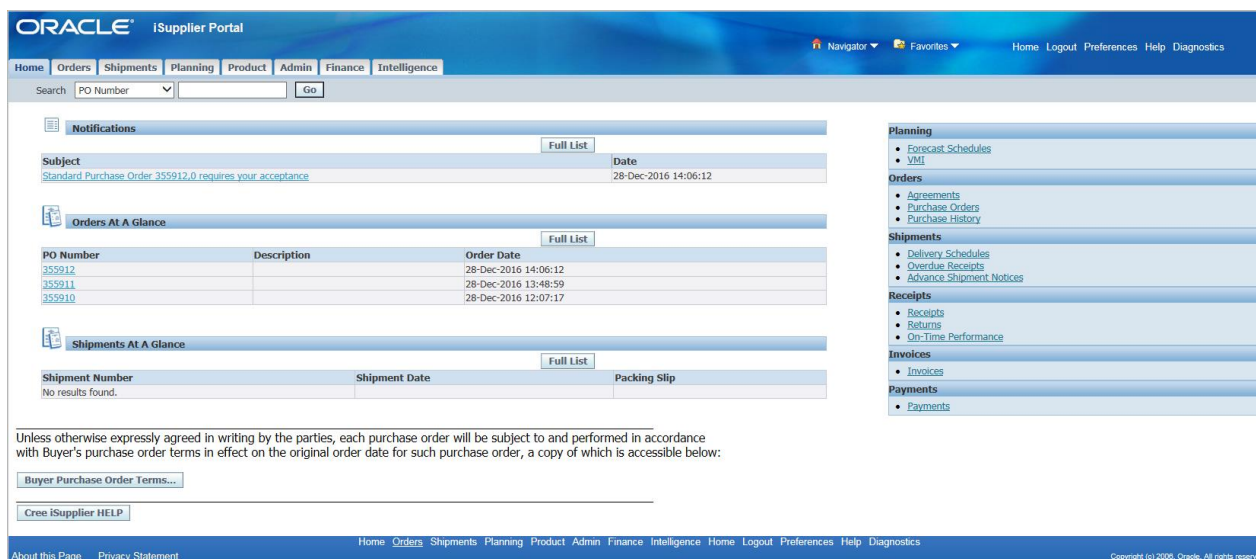
Canceling Orders or Shipments

You can submit cancellation requests for an entire order or a particular shipment using the Request Cancellation page. You can also submit changes and cancellations at the same time.

Procedure

In this topic, you will learn how to cancel a purchase order or shipment.

Step	Action
1.	Begin by navigating to the iSupplier Portal home page. Click the iSupplier Portal Full Access [Cree iSupplier Portal Full Access] link.

Step	Action
2.	Click the Orders [Orders] tab.
3.	The Purchase Orders page displays all the purchase orders for your organization.

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4.	Click the select ⬭ option.
5.	Click the Request Cancellation [Request Cancellation] button.
6.	The Request Cancellation page lets you submit cancellation requests for an entire order or a particular shipment. First, we will cancel an entire order.
7.	Using the Cancel Entire Order button will cancel all shipments against that order. Click the Cancel Entire Order [Cancel Entire Order] button.
8.	Click in the Reason for Cancellation field.
9.	Enter the desired information into the Reason for Cancellation field.
10.	Click the Submit [Submit] button.
11.	Now we will cancel a particular shipment. Click the Home [Home] tab.
12.	Click in the PO Number [_____] field.
13.	Enter the desired information into the PO Number field.
14.	Click the Go [Go] button.
15.	Click the PO Number link.
16.	Click the Actions [Actions Request Changes ▾] list.
17.	Select Request Cancellation [Request Cancellation ▾] list item.
18.	Click the Go [Go] button.
19.	Click the Select to show information [⊞ Show] link.
20.	Click in the Reason [_____] field.
21.	Enter the desired information into the Reason field.
22.	Click the Action [▾] list.
23.	Select the Cancel [Cancel ▾] list item.
24.	This will only cancel the shipment line. Click the Submit [Submit] button.
25.	This topic demonstrated how to cancel a purchase order or shipment. End of Procedure.

Viewing Shipping Information

Shipping Information includes information on viewing overdue receipts, delivery schedules, and advanced shipping notifications.
Upon completion of this lesson, you will be able to:

- View overdue receipts.
- View delivery schedules.
- View and export advance shipping notifications (ASN's).

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- Export+ on iSupplier Portal
- Submitting ASN's
- Manually Submitting ASN's
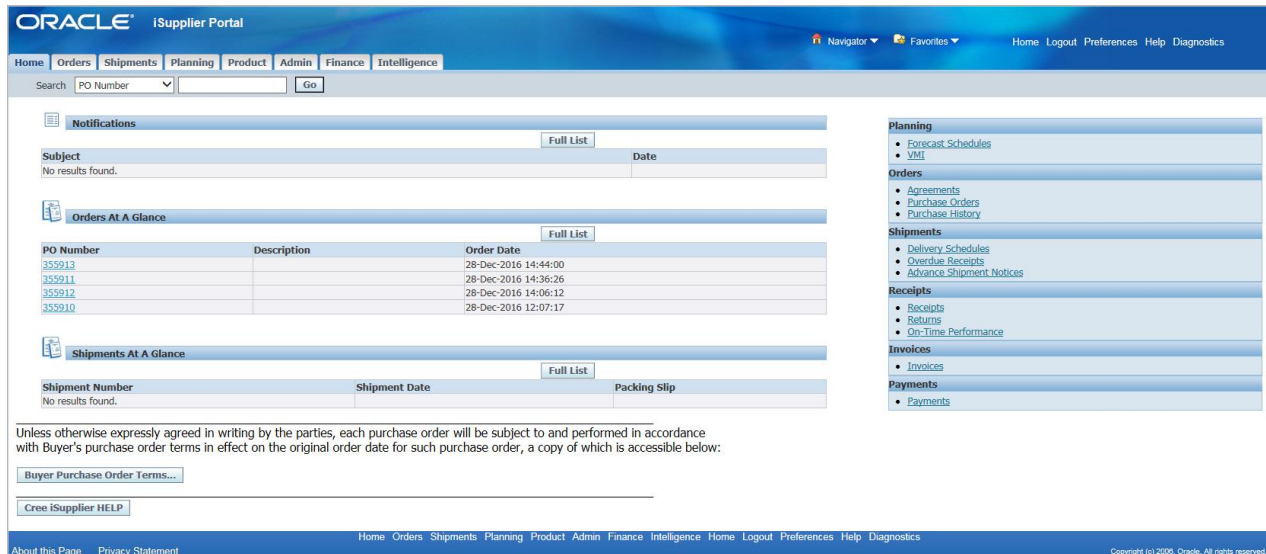
Viewing Overdue Receipts

The Overdue Receipts results page enables you to view the details of past due purchase order shipments.

Procedure

In this topic, you will learn how to view overdue receipts.

Step	Action
1.	Begin by navigating to the Overdue Receipts page. Click the iSupplier Portal Full Access ⎡Cree iSupplier Portal Full Access⎤ link.

Step	Action
2.	Shipping information details all of your shipping transactions on the Oracle iSupplier Portal. You can create or cancel shipment notices as well as view overdue shipment receipts. Click the Shipments ⎡Shipments⎤ tab.
3.	Click the Overdue Receipts ⎡Overdue Receipts⎤ link.
4.	The Overdue Receipts page enables you to view the details of past due purchase order shipments.
5.	Click in the Organization ⎡_____⎤ field.
6.	Enter the desired information into the Organization field.
7.	Click the Go ⎡Go⎤ button.

Step	Action
8.	Click the Advanced Search **Advanced Search** button.
9.	Click the "Show table data when any condition is met." ○ option.
10.	Click in the Organization [_____] field.
11.	Enter the desired information into the Organization field. Enter "Cree Lighting"
12.	Click the Go **Go** button.
13.	Select the Shipments: Overdue Receipts **Shipments: Overdue Receipts** link.
14.	This topic demonstrated how to view overdue receipts. End of Procedure.

Viewing Delivery Schedules

You can use the Delivery Schedules results page to quickly determine deliveries that need to be scheduled and deliveries that are past due.

Procedure

In this topic, you will learn how to view delivery schedules.

Step	Action
1.	Begin by navigating to the Overdue Receipts page. Click the iSupplier Portal Full Access **Cree iSupplier Portal Full Access** link.
2.	Oracle iSupplier Portal Shipments tab enables you to view your existing shipments. Using your shipments, you can create or cancel advance shipment notices. The system enables you to view shipment information such as delivery schedules. Click the Shipments **Shipments** tab.
3.	The Delivery Schedules page displays deliveries that need to be scheduled and deliveries that are past due.

4.	Click in the Organization [ ] field.
5.	Enter the desired information into the Organization field. Enter "Cree Lighting"
6.	Click the Go [Go] button.
7.	Click the Advanced Search [Advanced Search] button.
8.	Click the "Show table data when any condition is met." [◯] option.
9.	Click in the Item Description [ ] field.
10.	Enter the desired information into the Item Description field.
11.	Click the Go [Go] button.
12.	Select the Return Shipments: Overdue Receipts [Shipments: Delivery Schedules] link.
13.	This topic demonstrated how to view delivery schedules. End of Procedure.

Viewing and Exporting Advanced Shipping Notifications

You can use Advance Shipment Notice (ASN) or Advance Shipment Billing Notice (ASBN) to alert Cree Lighting for upcoming shipment deliveries.

To create an ASN or ASBN, select the purchase order shipments being shipped and provide the appropriate shipment details.

Procedure

In this topic, you will learn how to view and export advance shipping notifications using the View Advance Shipment Notices page.

Step	Action
1.	Click the iSupplier Portal [Cree iSupplier Portal Full Access] link.
2.	From iSupplier Portal homepage, access the View Advance Shipment Notices page by clicking on the Advance Shipment Notices [• Advance Shipment Notices] link in the Shipment region.
3.	In the View Advance Shipment Notices page, you can search for details on advance shipment notices using the following search criteria: • Shipment Number • Supplier • Supplier Site You must enter a minimum search criteria to display search results. Minimum search criteria for shipment notices include shipment number or supplier. You can view details of shipment notices in the search results list. To export data regarding shipment notices, click on the Export [Export] button.
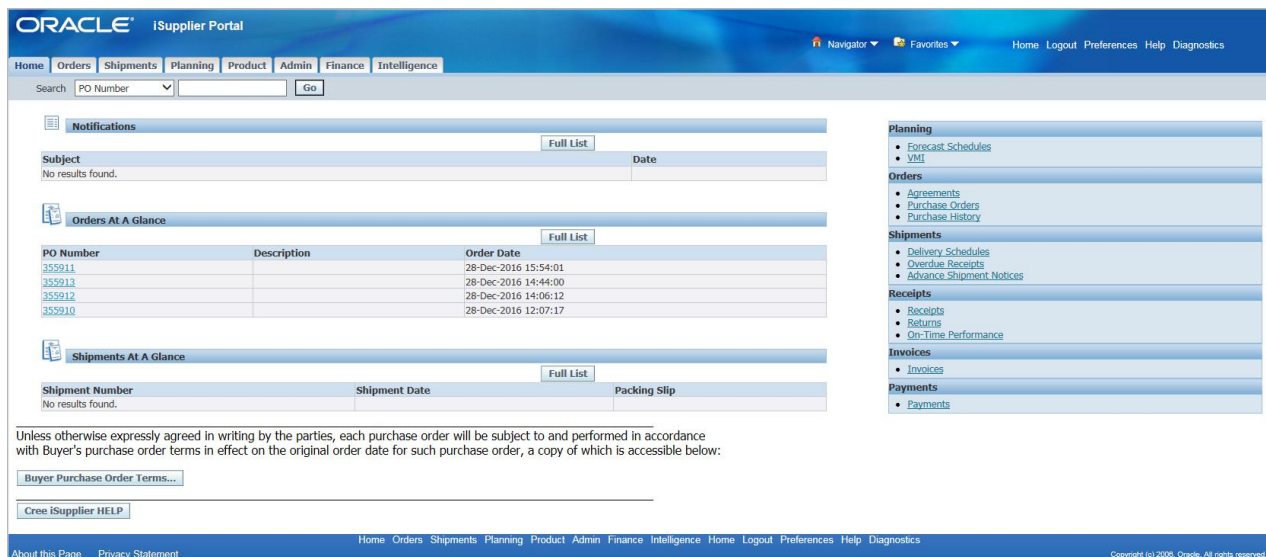
4.	Make a query using the shipment number. Click in the Shipment Number [ ] field.
5.	Enter the desired information into the Shipment Number field.
6.	Click the Go [Go] button.
7.	When you run the query, the results display below and you can click on the link under the Shipment Number column to view the details.
8.	Click the Show ⊞ Show link.
9.	To export data regarding shipment notices, click the Export button. You can then save the file to the desired location.
10.	This topic demonstrated how to view and export advance shipping notifications using the View Advance Shipment Notices page. End of Procedure.

Creating Advance Shipping Notices and Advance Shipping Billing Notices

Using Advance Shipment Notices and Advance Shipment Billing Notices
When you enter an Advance Shipment Notice (ASN) or Advance Shipment Billing Notice (ASBN), you alert the buying company of upcoming shipment deliveries. To create an ASN or ASBN, select the purchase order shipments being shipped and provide the appropriate shipment details.

If you have a large volume of ASNs or ASBNs, you may create a spreadsheet containing shipment details and upload it into your buying company's system. Using the spreadsheet template in the iSupplier Portal, you can create shipment notices offline, and then upload the file. See Uploading ASN and ASBN's.
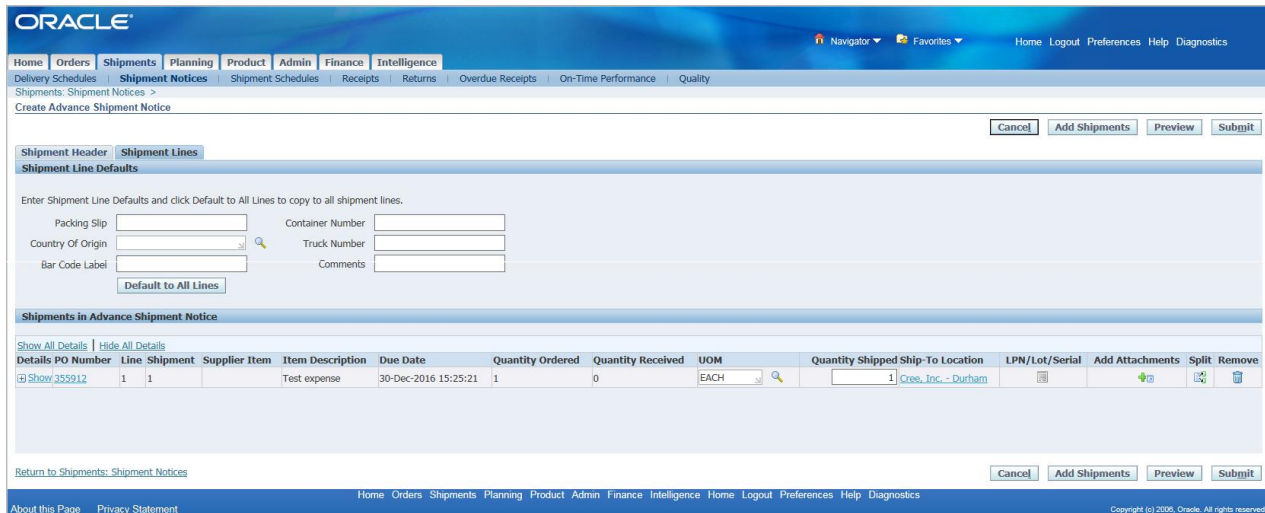
Procedure

In this topic, you will learn how to create an ASN.
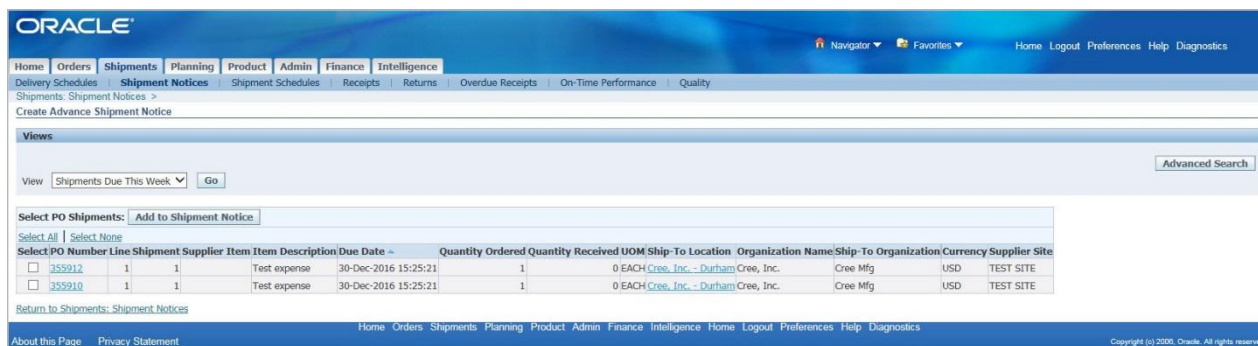
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Step	Action
1.	From iSupplier Portal homepage, click the Shipments [Shipments] tab, and then click Shipment Notices [Shipment Notices] in the task bar directly below the tabs.
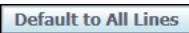
Step	Action
2.	On the Shipment Notices page, click Create Advance Shipment Notices [Create Advance Shipment Notices] for an ASN or Create Advance Shipment Billing Notice [Upload Advance Shipment and Billing Notices] for an ASBN. Note: If you are creating an ASBN, all selected shipments must belong to the same operating unit.

Step	Action
4.	Select either View Shipments Due This Week or View Shipments Due Any Time then click Go [Go] button. Click Advanced Search [Advanced Search] to enter additional search criteria to perform a more restrictive search.

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5.	Select one or multiple purchase order shipments, and then click Add to Shipment Notice ![Add to Shipment Notice] button.
6.	On the Create Advance Shipment Notice or Create Advance Shipment Billing Notice page, enter the appropriate shipment line defaults. Note: You can always add more shipments by clicking Add Shipments on the Shipments Line page. All fields with asterisk in the front of the field name denotes a required field.
7.	You can enter the line details once, for all shipment lines, if the details are common to all lines. To copy default to all shipment lines, click Default to All Lines ![Default to All Lines] button.
8.	To split a shipment line, click the Split icon ![icon] in the Shipments in Advance Shipment Notice section, and enter Shipping Quantity for the original and new lines.
9.	To remove a shipment, click the Remove icon ![icon] in the Shipments in Advance Shipment Notice section. Note: To display shipment details, click Show ![Show] in the Shipment and Advance Shipment Notice section. To hide shipment details, click Hide ![Hide] in the Shipment and Advance Shipment Notice section.
10.	Click the Shipment Header ![Shipment Header] tab. Enter the required ASN or ASBN information. You can also enter other information. The information you enter at the header level is transferred to the line level. (However, changes you make at the line level override information at the header level). If you are entering an ASBN, you must enter the following billing information: • Invoice number • Invoice date • Invoice amount In the Remit-To site section, verify that the Remit To Site details are correct. If the Remit to Site details need to be changed, click Change, select the correct

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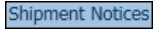
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	Remit To Site details, and then click Apply.
11.	If you would like to enter License Plate Number (LPN), Lot, or Serial Information, click the LPN/LOT/serial ▣ icon.
12.	To preview the ASN or ASBN, click the Preview [Preview] button.
13.	Review the ASN or ASBN and click the Submit [Submit] button.
14.	Your shipping notice is visible to the buyer and planner and helps them to know when to expect the shipment. This topic demonstrated how to submit an ASN. End of Procedure.

Uploading Advance Shipment Notices and Advance Shipment Billing Notices
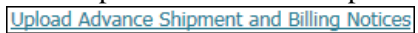
If you have a large volume of ASNs or ASBNs, you may create a spreadsheet containing shipment details and upload it into your buying company's system. Using the spreadsheet template in iSupplier Portal, you can create shipment notices offline, and then upload the file.

Procedure

In this topic, you will learn how to upload ASN from a template.

Step	Action
1.	From iSupplier Portal homepage, click the Shipments [Shipments] tab, and then click Shipment Notices [Shipment Notices] in the task bar directly below the tabs.

Step	Action
2.	Click Upload Advanced Shipment and Billing Notices [Upload Advance Shipment and Billing Notices] link.

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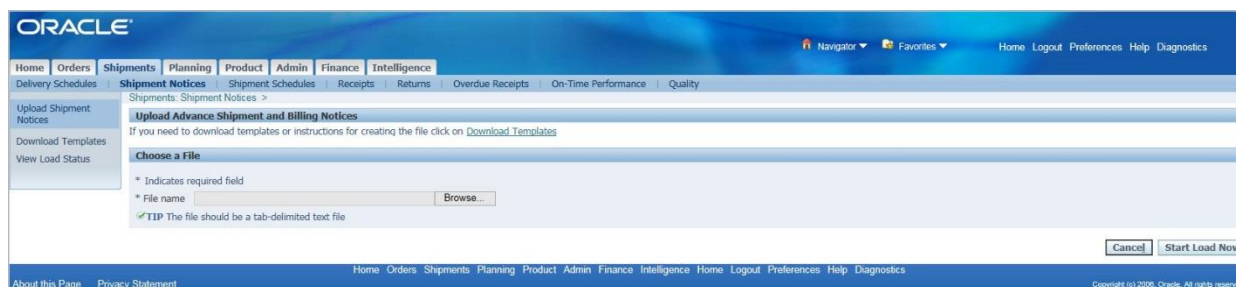
Step	Action
3.	On the Upload Shipment Notices page, click Download Templates [Download Templates] for instructions on uploading an ASN or ASBN.

Step	Action
4.	On the Download Templates page, choose the file you want to download and click Download [Download] button. You may choose from the following files to download: • ASN Template and Instructions - Contains instructions for uploading ASNs, a sample ASN spreadsheet file, and the template to use when entering ASN information offline. • ASBN Template and Instructions - Contains instructions for uploading ASBNs, a sample ASBN spreadsheet file, and the template to use when entering ASBN information offline. • Valid List of UOM, freight terms, etc.... - A list of values including country of origin, UOM, freight, carriers, payments terms, etc. is provided. You should use these values when creating your ASN/ASBN file. • Zip, All Files - Contains instructions for uploading ASNs, ASBNs, samples of ASN and ASBN spreadsheet files, templates to use while entering ASN and ASBN information offline, and lists of values.
5.	Complete the templates according to the instructions. Save your completed file locally.
6.	To upload your template, return to the Upload Shipment Notices page, browse for your completed template and upload it by choosing the Start Load Now [Start Load Now] button. End of Procedure.

Viewing Invoice and Payment Information

The View Invoices page enables you to search for and view details of an invoice you have submitted. You can search using any or all of the search criteria on the page, such as:

- Invoice Number
- Invoice date
- Due date
- Payment status

Invoice Amount Payment inquiry enables you to view the history of all the payments to your invoices completed by IR. You can use the View Payments page to search using various search criteria, including

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the following:

- Payment number
- Invoice number
- Payment date
- Purchase order number

Upon completion of this lesson, you will be able to:

- Submit invoices.
- Search for and view invoice details.
- View payment history on your invoices.
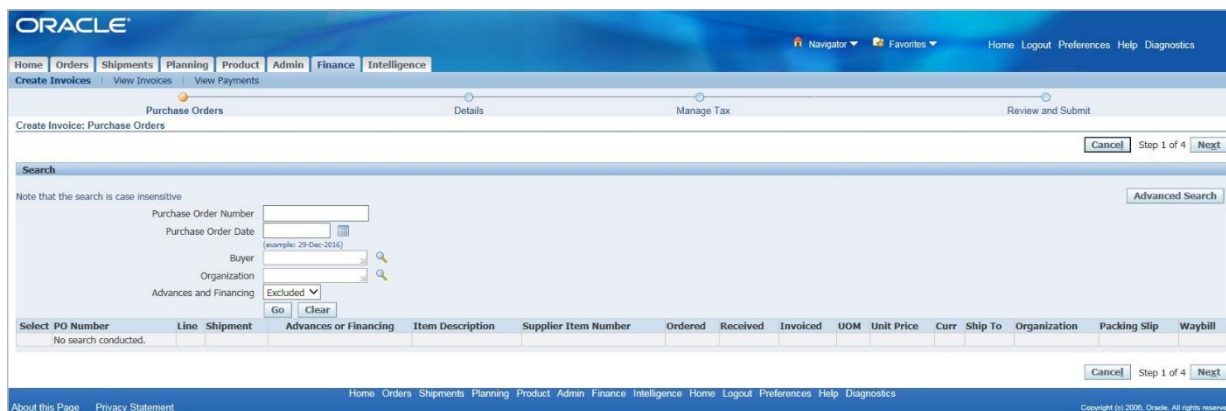
Submitting Invoices

You can submit an invoice online to IR based on the purchase order lines you have fulfilled. You need to only identify those items shipped and enter a quantity. You can invoice against open, approved, standard, or blanket purchase orders that are not fully billed.

You can enter a credit memo against a fully billed purchase order (use negative quantity amounts to enter a credit memo), as well as invoice against multiple purchase orders. However, the currency and organization of all items on an invoice must be the same. The organization is the entity within IR that you are invoicing.

Procedure

In this topic, you will learn how to submit invoices.

Step	Action
1.	On the iSupplier Portal Home page, click the Finance tab, and then click Create Invoices in the task bar directly below the tabs.
2.	On the Invoice Actions page, select either With a PO [With a PO ▼] from the Create Invoice Menu and click Go [Go] button.

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CREE ⬥ LIGHTING A COMPANY OF *IDEAL INDUSTRIES, INC.*		File Name: LSC006　　　　Rev: 1
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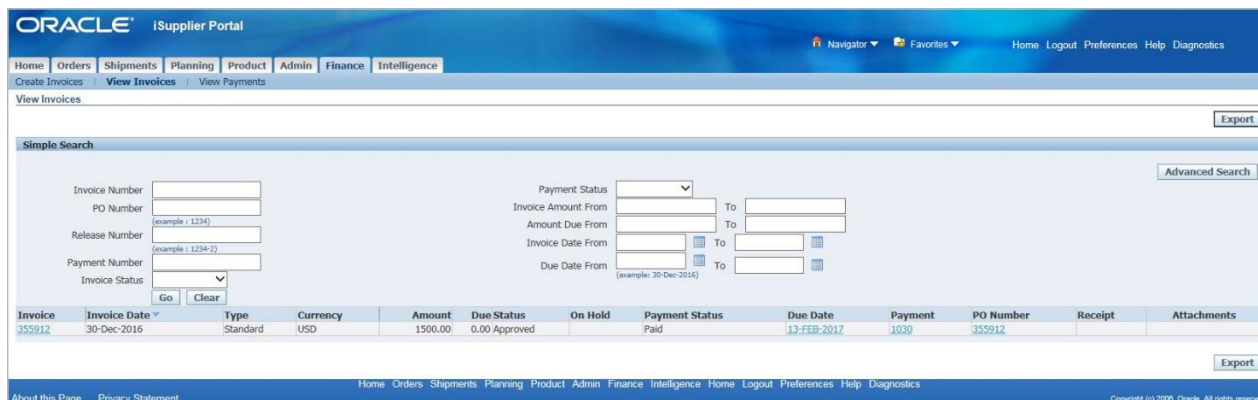| Step	Action
3.	On the Create Invoice: Purchase Orders page, enter search criteria to identify the purchase order, and click Go [Go] button.
4.	Select items of the PO to be invoiced and click Add to Invoice. Add as many items as you need (items on your invoice display at the bottom of the page). If you mistakenly add an item to the invoice, you can select it and click Remove from invoice.
5.	When finished adding items, click Next
6.	On the Create Invoice: Details page, enter an invoice number and remit to address. You can also update the quantity and/or price. Enter and any additional information, and then click Next.
7.	On the Create Invoice: Manage Tax page, you can view the tax information generated.
8.	When finished, click Next.
9.	On the Create Invoice: Review and Submit page, review your invoice and click Submit. You also have the option to return to this invoice later by clicking Save for Later.
10.	A Confirmation page is generated informing you of successful invoice creation. End of Procedure.

Viewing Invoice Information

The View Invoices page enables you to search for and view details of an invoice you have submitted. You can search using any or all of the search criteria on the page, such as:

- Invoice Number
- Invoice date
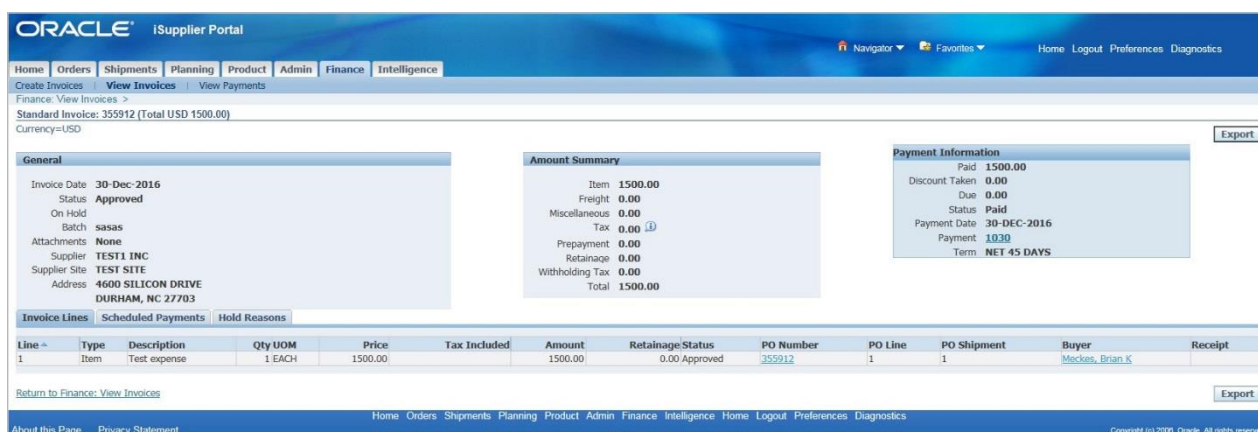- Due date
- Payment status
- Invoice Amount

Procedure

In this topic, you will learn how to view invoice information.

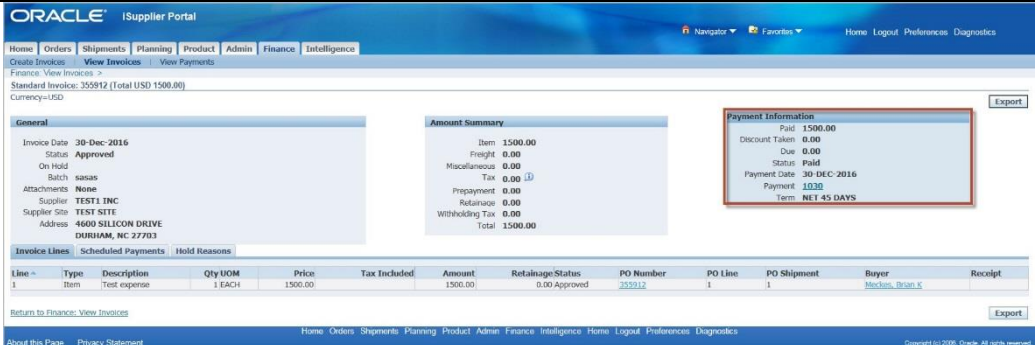| Step	Action
1.	On the iSupplier Portal Home page, click the Finance tab, then click the View Invoices [View Invoices] subtab.
2.	On the View Invoices page, enter search values into one or more of the search fields, and click Go [Go] or use the Advanced Search [Advanced Search] option.

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Step	Action
3.	When the search results display, click the Invoice Number link to view details of the invoice. (You can also view any associated purchase order(s), payments, scheduled payments, or netting report by clicking their respective links, or icons).

Step	Action
4.	On the Invoice Details page, you can see the header level information.
5.	To view invoice line information, click the Invoice Lines **Invoice Lines** tab. You can also view any scheduled payments and any hold information.
6.	In the Payment Information region of Invoice Header, you can view the following dispute information for an Invoice: • Amount Paid • Payment Status • Payment Document

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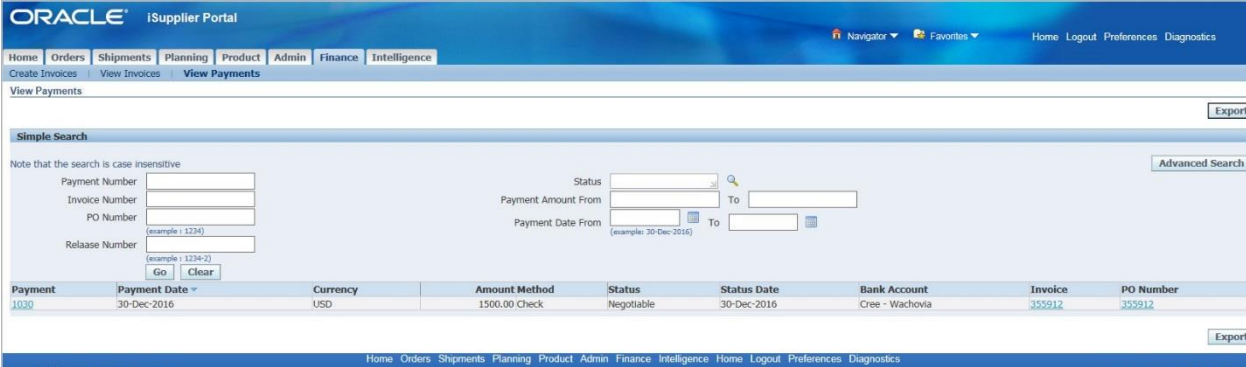|	
7.	This topic demonstrated how to view invoice information. End of Procedure.

Viewing Payment Information

Payment inquiry enables you to view the history of all the payments to your invoices completed by Cree Lighting. You can use the View Payments page to search using various search criteria, including:

- Payment number
- Invoice number
- Payment date
- Purchase order number

Procedure

In this topic you will learn how to view payment information.

Step	Action
1.	On the iSupplier Portal home page, click the Finance tab, then click the View Payments [View Payments] subtab.
2.	On the View Payments page, enter search values into one or more of the search fields, and click Go [Go] button. Or use the Advanced Search [Advanced Search] option.

Step	Action
3.	When the search results display, click the payment number link to view details of the payment. (You can also view any associated purchase order(s), or invoices by clicking their links).

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Step	Action
4.	On the Payments details page, you can see the payment details including the invoices addressed by the payment.

Document Revision History

Date	Rev	DCN #	Change Description	By:	Approval
02/02/2017	0	DMS	Origination of Document	J. Peters	DMS
09/18/2019	1	DMS	Updated for name change to Cree Lighting	J. Peters	DMS

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