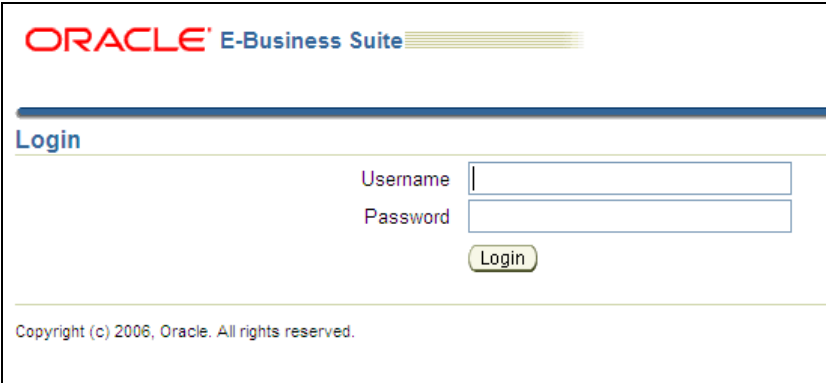
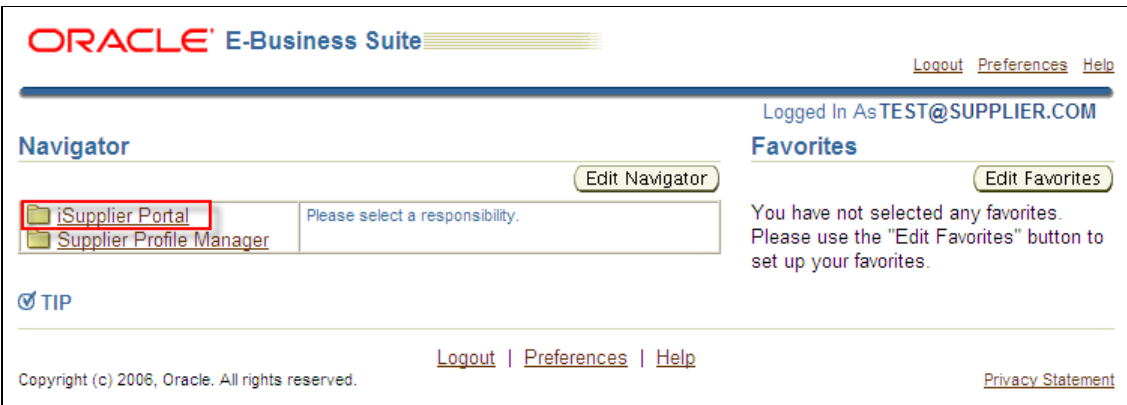


This job aid highlights the key functionality of Yale's new supplier inquiry solution, the iSupplier Portal. There are two different responsibilities that can be assigned to an iSupplier Portal user:

- **iSupplier Portal read-only access** – all users with access to the iSupplier Portal have this responsibility. Users can view purchase orders, invoices, payment status, and supplier master data.
- **Supplier Profile Manager** – only designated users from each supplier have this responsibility. In addition to viewing the information listed above, these users maintain the supplier master data (contacts, addresses, business classifications, and banking information).

The steps below demonstrate how to access the iSupplier Portal and highlight the major functionality:

1	Access the <b>iSupplier Portal</b> (the link is available in the original registration email from Yale)
2	<p>Enter your <b>Username</b> and <b>Password</b> and click <b>Login</b></p> 
3	<p>Click on iSupplier Portal to view purchase orders, invoices, and payment status</p>  <p><i>Note: Only the iSupplier Portal read-only access is covered in this job aid</i></p>

4

The iSupplier Portal Home Page is displayed

The screenshot shows the Yale iSupplier Portal interface. At the top right, there are links for Home, Logout, Preferences, and Help (callout 1). Below this is a navigation bar with tabs for Home, Orders, Account, and Admin (callout 2). A search bar is located below the navigation bar, with a dropdown menu set to 'PO Number' and a 'Go' button (callout 3). The main content area is divided into several sections: 'Notifications' (callout 4) with a 'Full List' button and a table showing 'No results found'; 'Orders At A Glance' (callout 5) with a 'Full List' button and a table showing 'No results found'; and a 'Quick Links' sidebar (callout 6) with links for Purchase Orders, Purchase History, Invoices, and Payments. At the bottom, there is a footer with a service center contact tip, navigation links, and copyright information.

1. **Global Links** are available on all iSupplier pages
  - Home: Returns users to the Oracle E-Business Suite homepage where you can select another responsibility, if applicable
  - Logout: Logs you out of the iSupplier Portal
  - Preferences: Allows you to set user preferences
  - Help: Opens Oracle's iSupplier Portal Help
2. **Tabs** are used to organize pages within the iSupplier Portal. The Orders tab will display purchase orders and the Account tab will display the invoices and payments pages. The Admin tab gives users read-only access to the supplier master data.
3. **Search** enables you to search directly for a specific purchase order, invoice, or payment. To search;
  1. Select a document type (purchase order, invoice, or payment) from the drop-down list
  2. Enter the appropriate number
  3. Click Go
4. The **Notifications** section displays the most recent open notifications. Notifications are messages that users receive from Yale; notifications are also sent to the user's registered email address. Click the Full List button to access the notifications page and view all notifications
5. **Orders At a Glance** displays the five most recent purchase orders. Click on a PO number link to view purchase order details.
6. **Quick Links** on the right of the screen display links to pages for viewing orders, invoices, and payments. Click on any link to go directly to the corresponding page.

5 To view a **Purchase Order** click on the Purchase Orders quick link or the Orders tab

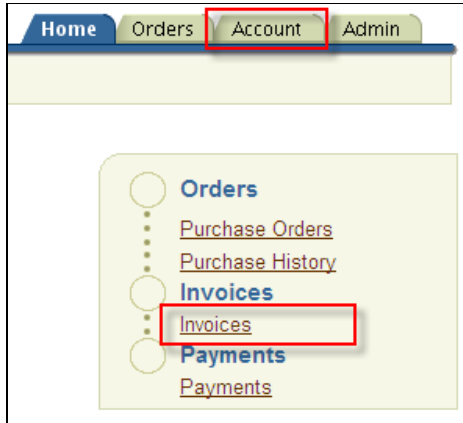


6 The **Purchase Order Home Page** is displayed



- The **View** dropdown menu allows you to view the last 25 Purchase Orders or all Purchase Orders  
*Note: The two other options "Purchase Orders to Acknowledge" and "Purchase Orders Pending Supplier Change" are currently not in use.*
- The **Export** button is used to export the information to a spreadsheet
- Use the **Advanced Search** to add more search criteria
- Click on the **PO Number** to get additional detailed information about the selected order
- The **Revisions (Rev)** column displays the number of revisions associated with the PO. If the value under the Rev column is greater than 0, click on the revision number to see the list all the revisions. *Note: Revisions can only be made by Yale Procurement.*

7 To view an **Invoice** click on the Invoices quick link or the Account tab



8 The **Invoice Summary Page** is displayed:

**Yale iSupplier Portal**

Home | Logout | Preferences | Help | Personalize Page

Home | Orders | **Account** | Admin

View Invoices | View Payments

Invoice Summary 2 Export

Simple Search 3 Advanced Search

1

Invoice Number % PO Number  
 Payment Number Payment Status  
 Gross Amount From Invoice Date From  
 Gross Amount To Invoice Date To  
 Amount Due From Due Date From  
 Amount Due To Due Date To

Go Clear

5

Invoice Number	Description	Invoice Date	PO Number	Currency	Gross Amount	Amount Due	Due Date	Status	Payment Number	Discount Date	Available Discount	Packing Slip	Attachments	Type
42380	HOPP Match to Existing PO	10-Jul-2009	1116177	USD	2,475.00	2,475.00	19-Aug-2009	Approved						Standard
41193	DKP1111565	30-Jun-2009		USD	60,756.84	0.00	05-Aug-2009	Approved	2907233 - Check					Standard
531694		30-Jun-2009	5313927	USD	1,052.94	1,052.94	09-Aug-2009	Approved						Standard
531328		30-Jun-2009	5300459	USD	14,107.74	14,107.74	09-Aug-2009	On Hold						Standard
530508		18-Jun-2009	5308366	USD	683.80	0.00	28-Jul-2009	Approved	2907233 - Check					Standard
530307		16-Jun-2009		USD	70.20	70.20	26-Jul-2009	On Hold						Standard

6

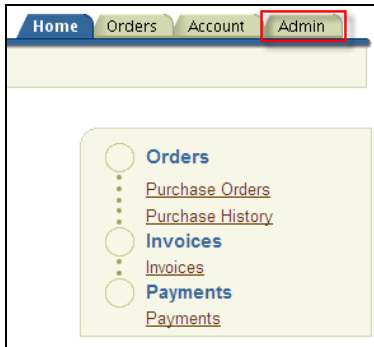
Previous 1-25 Next 25

Home | Orders | Account | Admin | Home | Logout | Preferences | Help | Personalize Page

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1. Use the **Simple Search** fields to find a specific invoice or leave the fields blank and click "Go" to display all invoices
2. The **Export** button is used to export the information to a spreadsheet
3. Use the **Advanced Search** to add more search criteria
4. Click on the **Invoice Number** to get additional detailed information about the selected invoice
5. Click on the **Status** column to view invoices sorted by approved or on hold status. Click on the "On Hold" link to view the hold reason.
6. Click on the **Payment Number** of a specific invoice and a new page will open with the payment information.

- 9 To view general information regarding your company on the **Profile Management** page, click on the Admin tab:



- 10 After clicking the Admin tab, the **Supplier Details Page** is displayed:



1. The **Supplier Details** page has general information about the supplier
2. The **Address Book** shows the various sites associated with the supplier
3. The **Contact Directory** shows all contacts associated with the supplier
4. The **Business Classifications** page displays any classifications (e.g. minority owned, small business) that apply to your company
5. The **User Accounts** page lists all users with active accounts that can access the portal on behalf of your company

*Note: This view is read-only. To edit this information and bank accounts, the administrator for your company needs to request changes through the Supplier Profile Manager link on the Oracle E-Business Suite homepage.*