LABUAN SHIPYARD & ENGINEERING SDN BHD

Oracle Supplier Portal Cloud

User Manual

Procurement Admin

Prepared by:

Siti Jamaliah Jamaludin

Oracle Functional Consultant
Olivestouch Technologies Sdn Bhd

olivestouch

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1 GETTING STARTED

This document provides instructions on how the procurement administrator manages supplier access and maintenance using Oracle applications.

1.1 Sign-On to Cloud applications

To log into the application:

1. Open internet browser window.
2. Enter the below URL:

Environment	Link for Supplier Portal login
TEST	https://login-etei-test-saasfaprod1.fa.ocs.oraclecloud.com/
PROD	https://login-etei-saasfaprod1.fa.ocs.oraclecloud.com/

Table 1 Direct Login URL

3. The Sign In page appears. Enter your **User ID** and **Password.**

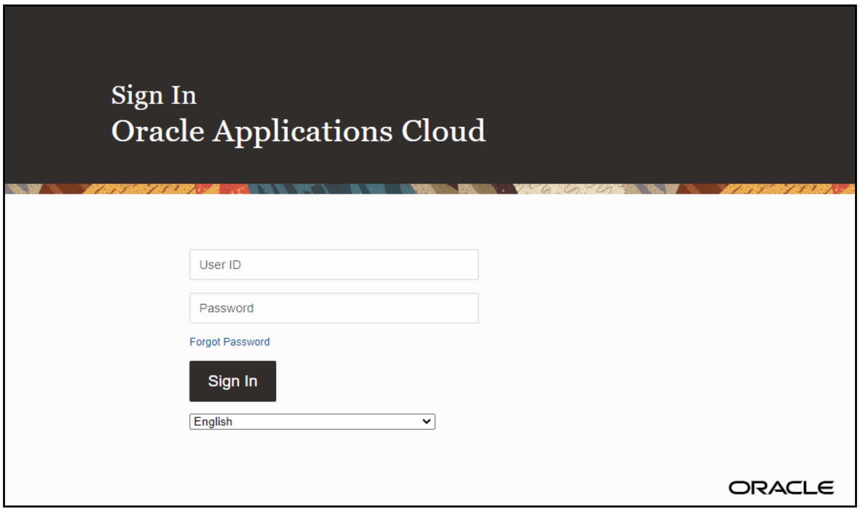


Figure 1 Oracle Cloud Sign-In Page

4. Your user ID and password are case sensitive. Passwords always appear as asterisks in the display as you enter them.
5. Tab to or click the 

 button to sign in.
6. Personal Homepage dashboard screen appears with CLOUD privilege access.

2 MANAGE SUPPLIER REGISTRATION REQUEST

Suppliers will submit the registration application; procurement admin will receive an email to proceed with the next step. Below is the sample of email that procurement admin will receive.

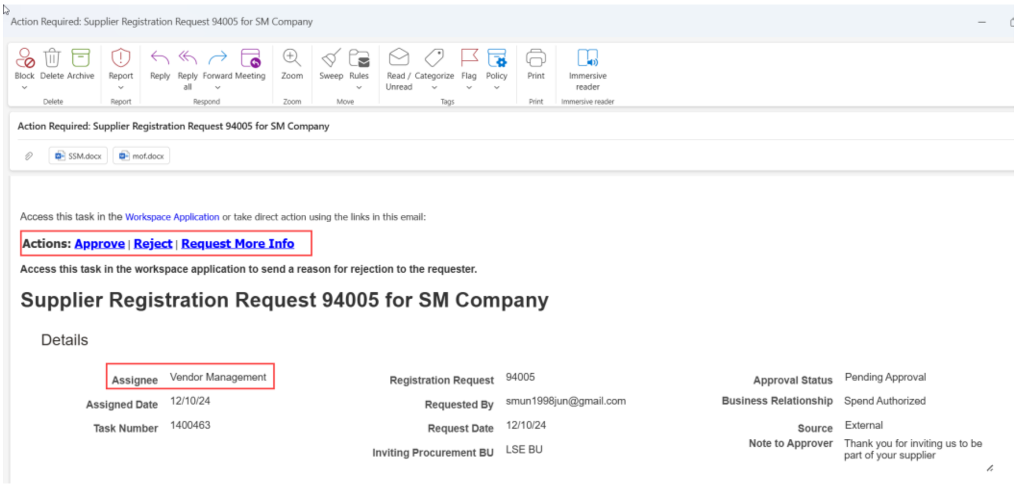


Figure 2 Email after supplier submit application

2.1 Reviewing Supplier Registrations Application

Step to continue reviewing the application in the screen.

No.	Work Area	Navigation	Personnel
1.	Procurement	Suppliers	Vendor Management

Table 2 Navigation

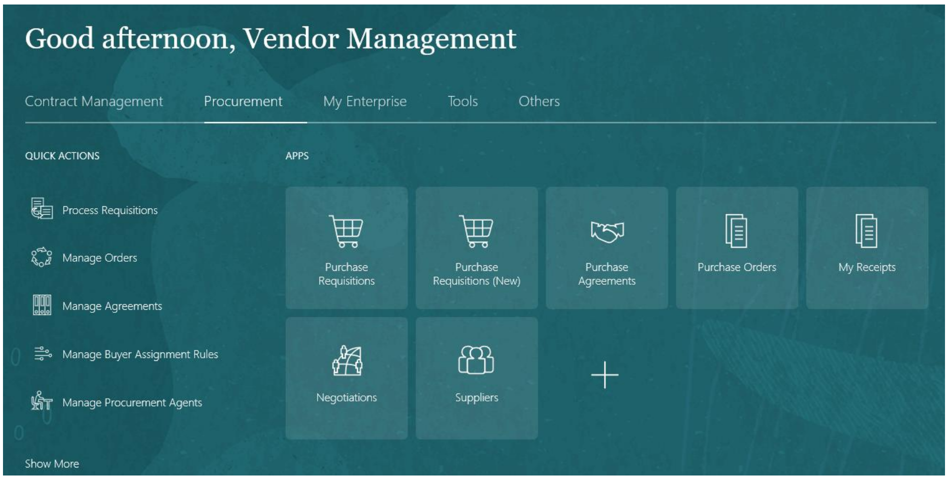
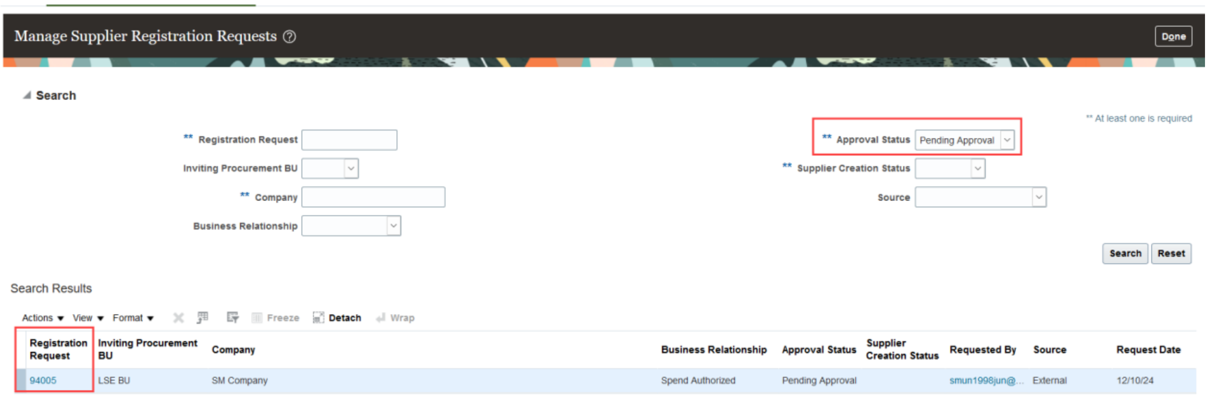


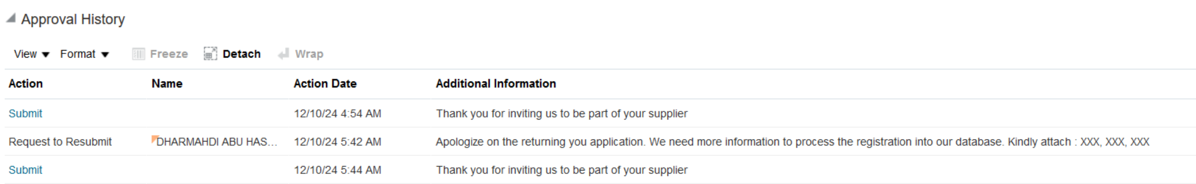
Figure 3 Procurement Landing Page

<table>
<tr><th>No.</th><th>Steps</th></tr>
<tr><td>1.</td><td>Go to Task.
Click Manage Supplier Registration Requests.

</td></tr>
<tr><td>2.</td><td>Manage Supplier Registration Requests screen will appear, and approval status options already defaulted into “Pending Approval”. Searching results will appear as follows:



Click on the blue link to review the details.</td></tr>
<tr><td>3.</td><td>Review the details. Approval status will appear as below:



Then click “Done” when complete.</td></tr>
</table>

Table 3 Supplier Registration Review

3 APPROVAL MANAGEMENT

Approvers will receive an email and application notification regarding supplier submissions. Approver can either approve through email hyperlinks or application's notification.

Events that require approval actions:

- New External Supplier Registration
- Supplier Update Information

Approving through email:

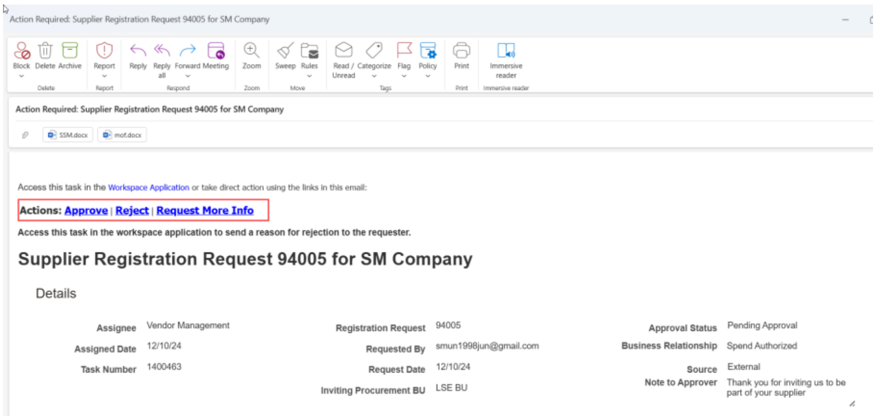
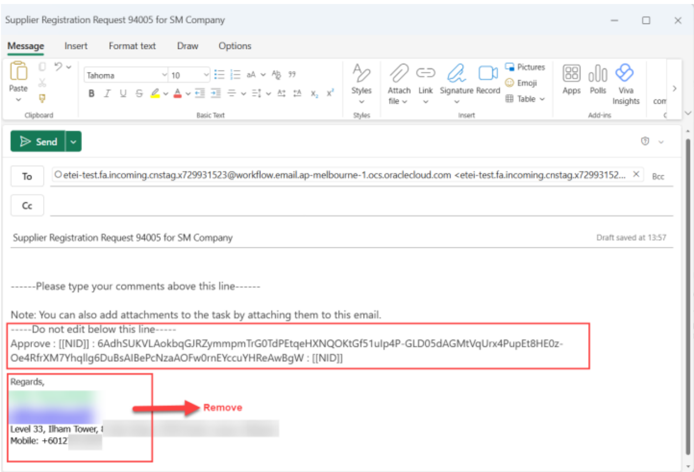
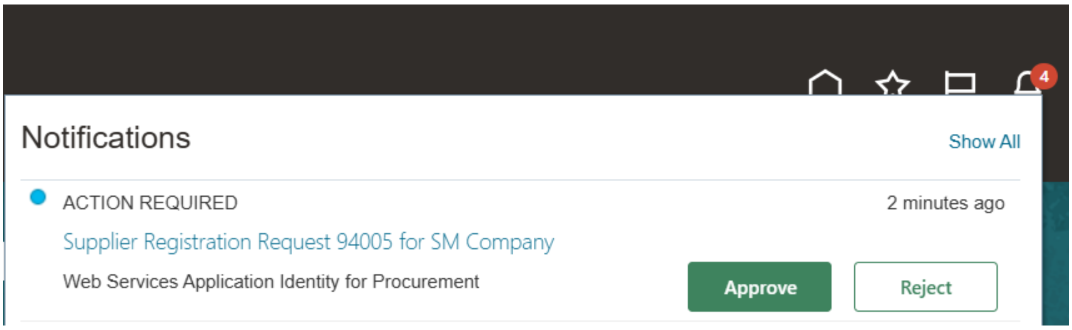
No.	Steps
1.	Open the email. Review all the registration details.  Click on the blue link to proceed with your action.
2.	New window of replying email will appear as follows.  1. Do not edit the item below the line. 2. Kindly remove the signature part. This is to make sure the actions capture correctly to the system specifications and not including unnecessary picture as part of the attachment to the document. After completing the comments and attachment (if any). Click "Send" to trigger the actions to the application.

Table 4 Approval through Email

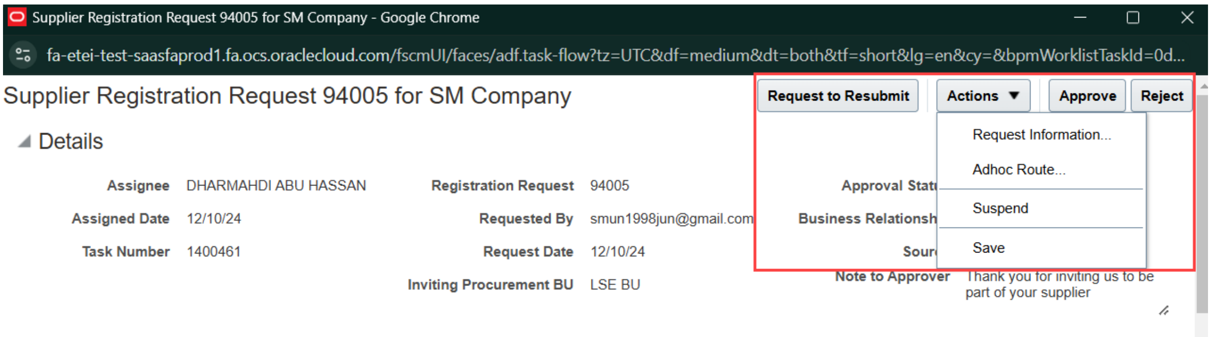
Approving through application’s notification:

<table>
<tr><th>No.</th><th>Steps</th></tr>
<tr><td>1.</td><td>
Open the application. Navigate to the bell icon.

Click on the notification appear that related to the supplier registration application.



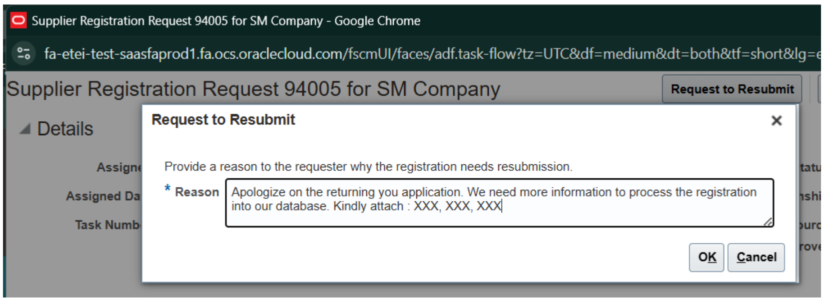
Click the blue link to review the application.
</td></tr>
<tr><td>2.</td><td>
New pop-up window will appear. There are few more actions that you can use upon the review.



Request to resubmit = the registration will be pending and supplier will receive notitications based on the remarks that you put during the action confirmation.

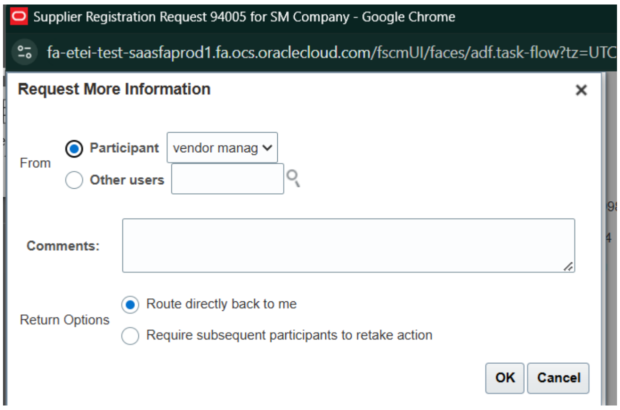
Request for information = you can delegate and request more information from internal operation user regarding this supplier.

Adhoc route = approval delegation to another user.
</td></tr>
<tr><td>3.</td><td>
If you choose to ‘Request to Resubmit’ action. Below is the pop-up remarks screen that will be shown.



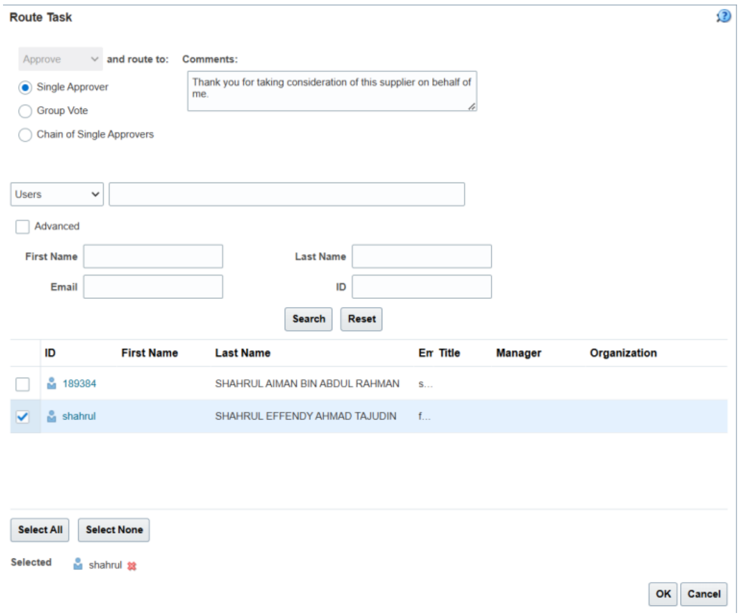
Put the remarks, so the supplier will get notified in the email upon resubmit action.
</td></tr>
</table>

<table>
<tr><td>4.</td><td>
If you choose to ‘Request More Information’ action. Below pop-up screen will appear.



Choose the participant, by default it will route to the previous participant. You can choose Other users as well to inquire about the supplier. Put the comments (if needed).

Choose ‘Return Options’ (if needed).
</td></tr>
<tr><td>5.</td><td>
If you choose to ‘Adhoc Route’ action. Below pop-up screen will appear.



Choose the route task to use ‘Single Approver’ action. Put comments (if needed).

Choose user that needs to approve the registrations on behalf of you. Filter that been usually used is email, or last name. ID is referring to the userid.

Search and tick the correct user. Then click OK.
</td></tr>
</table>

Table 5 Approval through Application Notification

Supplier will receive notification after approved action complete in the system.

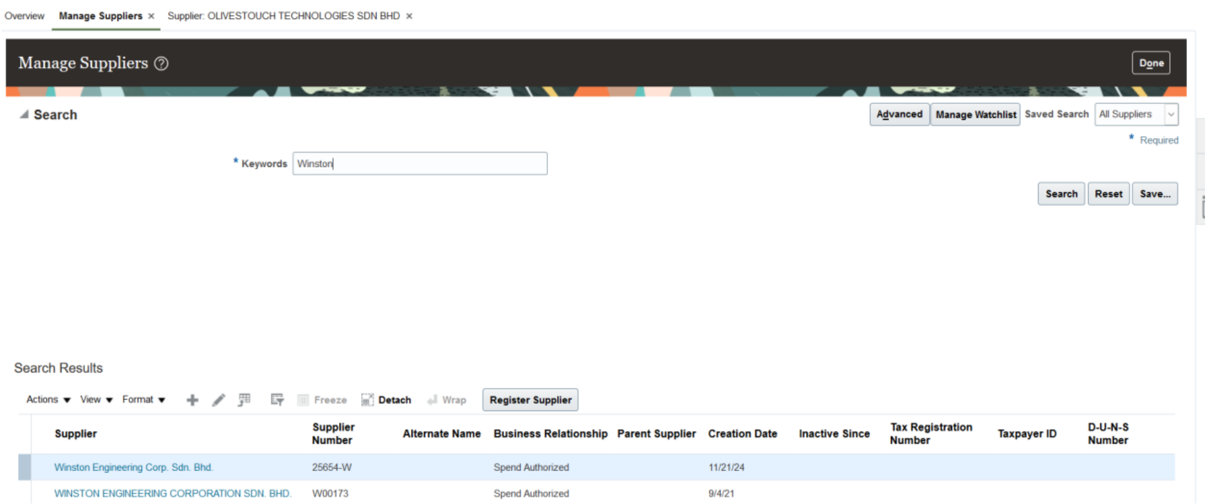
4 SUPPLIER PORTAL ACCESS – EXISTING SUPPLIER

Supplier already exists in Oracle application database but does not have credentials and access to Supplier Portal. Procurement administrators can grant access and roles to the supplier using the Supplier Maintenance work area.

No.	Work Area	Navigation	Personnel
2.	Procurement	Suppliers	Vendor Management

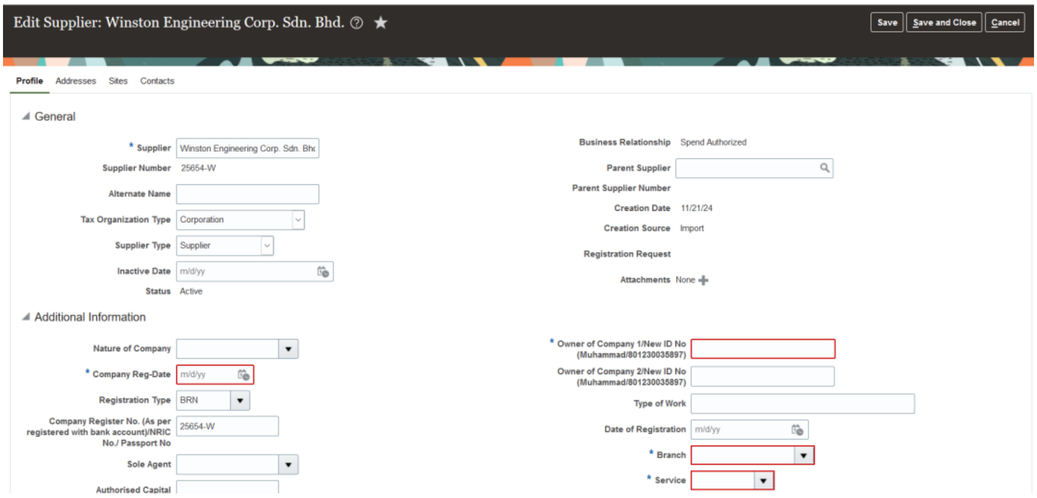
Table 6 Navigation

<table>
<tr><th>No.</th><th>Steps</th></tr>
<tr><td>1.</td><td>Click on Task.
Choose Manage Supplier.

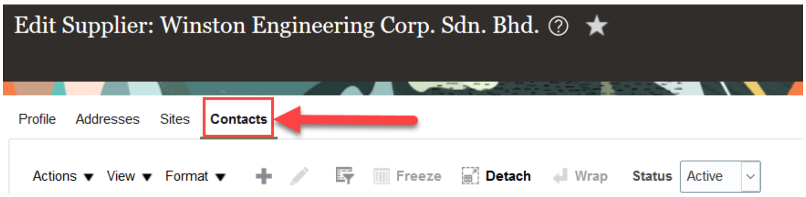
</td></tr>
<tr><td>2.</td><td>Enter the keyword that can identify the supplier, e.g.: Supplier keyword name. Click Search button and the search result will appear below.


Choose the supplier that you want to grant access Supplier Portal to them.</td></tr>
</table>

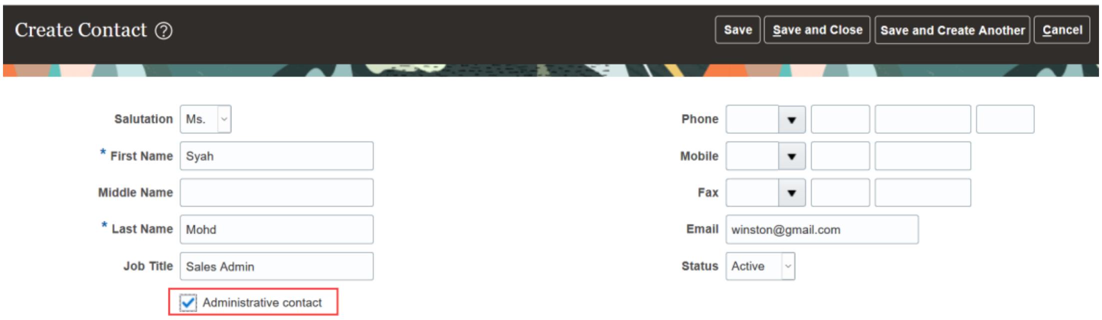
<table>
<tr><td>3.</td><td>Supplier from migration will not completing few required details for LSE verification.



In order to proceed with the changes, you must fill the information even though it was DUMMY information. You can get your supplier to update the information later on.</td></tr>
<tr><td>4.</td><td>Navigate to the Contacts Tab.



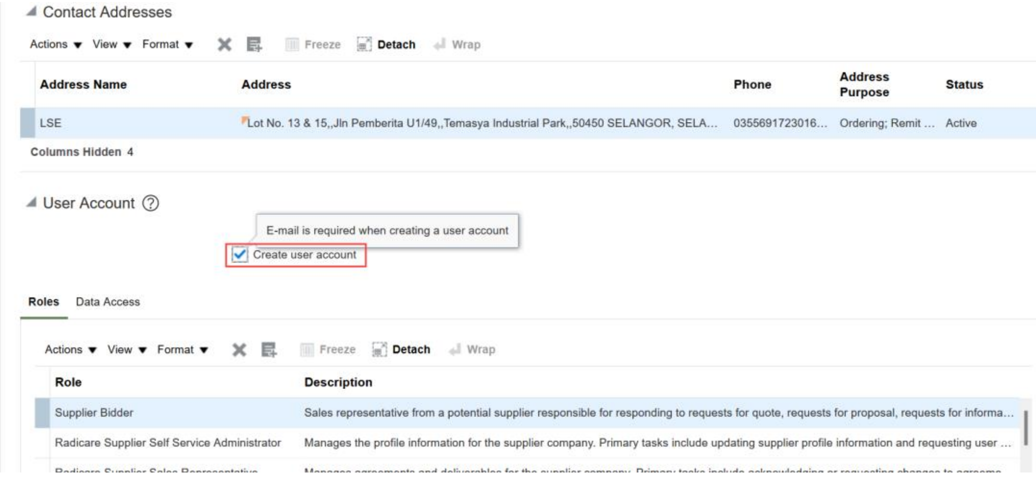
Click ➕ to add the contact for the supplier.</td></tr>
<tr><td>5.</td><td>Fill in the information.



Tick as ‘Administrative contact’</td></tr>
<tr><td>6.</td><td>Scroll down to fill more information for the Supplier Portal Access.

You must choose the registered address that associate with this contact.

Click [icon] to add the address. Choose the address from the list, then click OK.</td></tr>
</table>

<table>
<tr><td>7.</td><td>Tick ‘Create User Account’ checkbox. This action ensures that a user ID is created for the supplier based on the registered email.


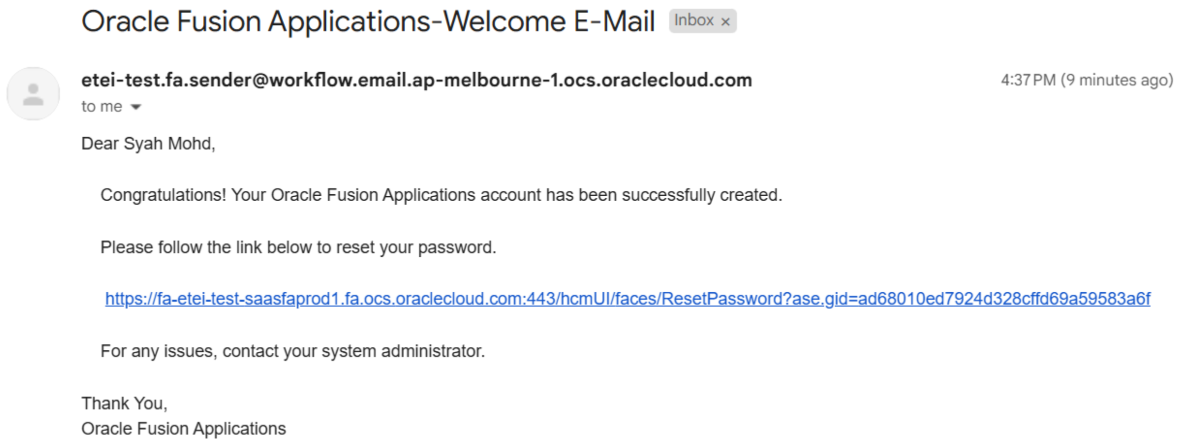
If you need more roles to be granted for the supplier, you can click on [icon] to add more.</td></tr>
<tr><td>8.</td><td>Click ‘Save’ after complete. There will be few moments to take to create the user account.</td></tr>
<tr><td>9.</td><td>Supplier will receive email upon successfully user created.

</td></tr>
</table>

Table 7 Grant Access Supplier Portal for Existing Supplier

5 SUPPLIER CREATION

Supplier Landing Page/ Overview page

The overview page provides the Supplier Administrator with the supplier information needed to carry out tasks ranging from routine maintenance, to event driven administrative responsibilities. In addition, the overview page contains reports that highlight supplier issues requiring attention and provides easy access to maintain and update supplier records. From the overview page, the Supplier Administrator can quickly get in touch with a contact for a supplier reported to require communication by accessing the Actions menu.

No.	Work Area	Applications
1.	Procurement	Suppliers

Table 8 Navigation

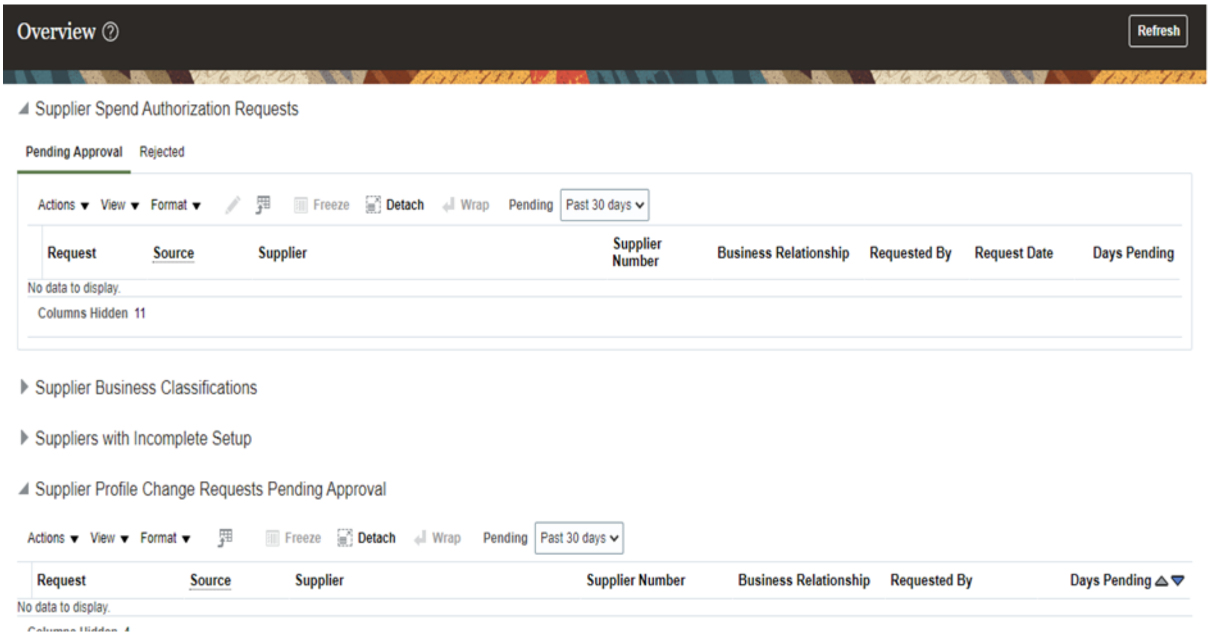


Figure 4 Supplier Landing Page

5.1 Supplier creation and update from supplier page

<u>Creating Supplier</u>

No.	Steps
1.	Navigate to **Procurement** > **Supplier**
2.	Click the **Task** Panel Tab > **Create Supplier.** If you do not see **Create Supplier** task, click **Manage Supplier,** and click **Create.**
3.	Enter **Supplier name**, **Business Relationship** (Prospective / Spend Authorize) and **Tax Organization Type**
4.	Click **Create**

Table 9 Create Supplier

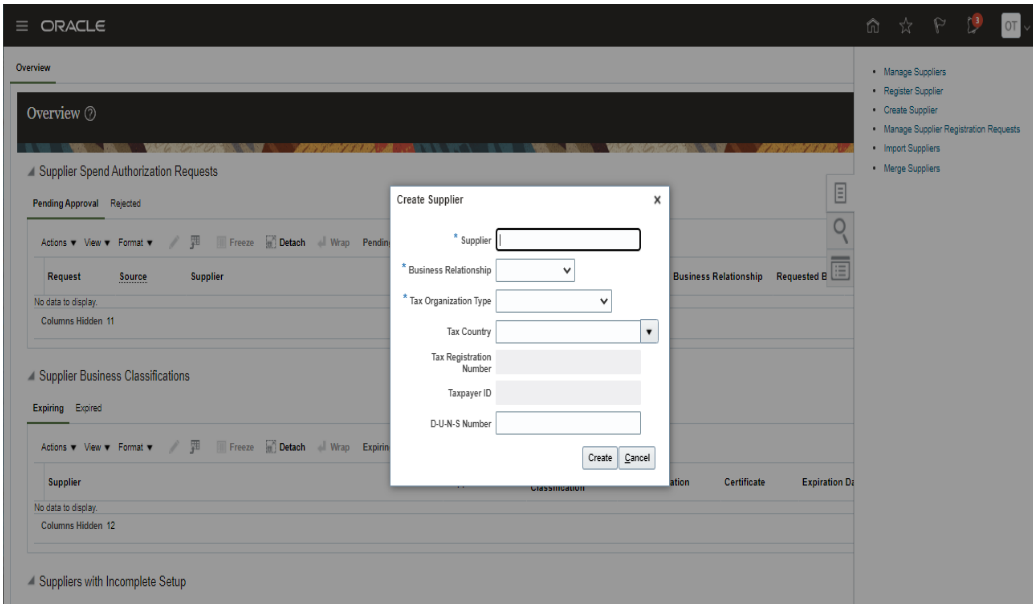


Figure 5 Creating Supplier

Once Supplier record is created, you can **edit**, **manage,** or **update** the supplier record.

So, there are 4 tabs to that you can filled to complete supplier details for use in transaction, Profile, Addresses, Sites and Contacts Tab.

Profile Tab

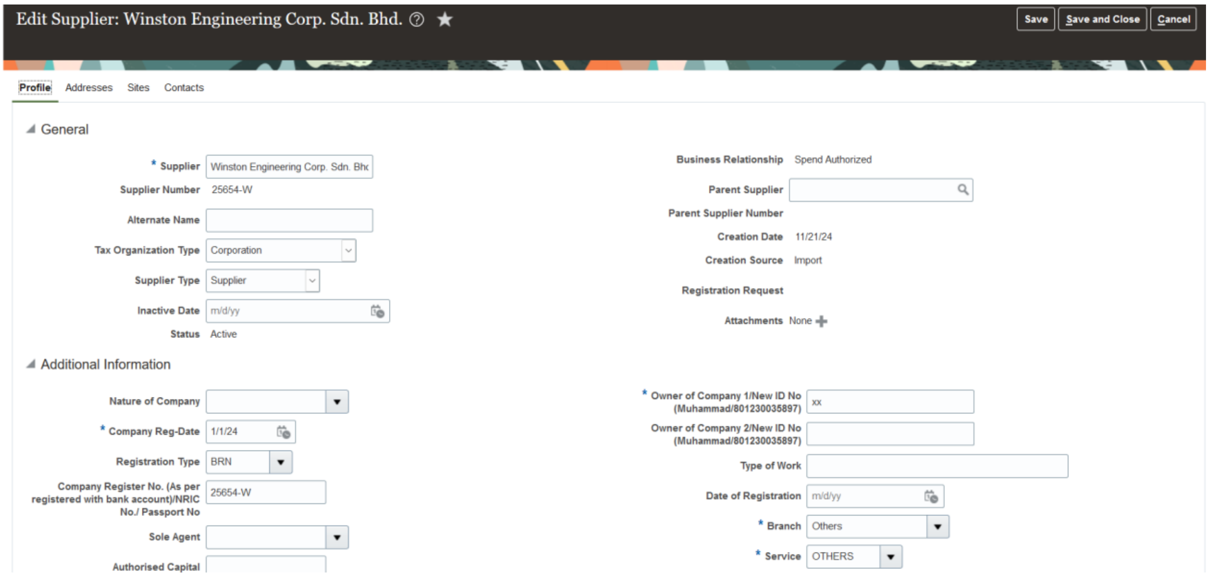


Figure 6 Supplier Profile Tab

On the Profile tab, you can review the supplier details that you have provided earlier upon creating the supplier and fill more profile information regarding to the supplier.

On the lower section of this page, you can also fill more profile details for that supplier such as Organization, Business Classification, Product & Services, Transaction Tax, Income Tax and Payment Details.

Required field to enter on this section is Payment Details.

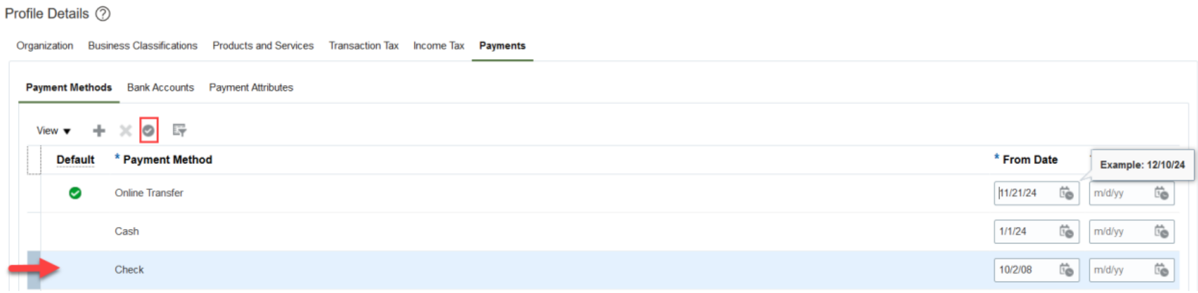


Figure 7 Entering Payment Details

To enter Payment Details:

No.	Steps
1.	From Profile Details Section under Supplier Profile Tab, Navigate to **Payment**
2.	Click On **Payment Methods**, Choose the Default Method of Payment and Click on to default

Table 10 Enter Payment Details

Address Tab

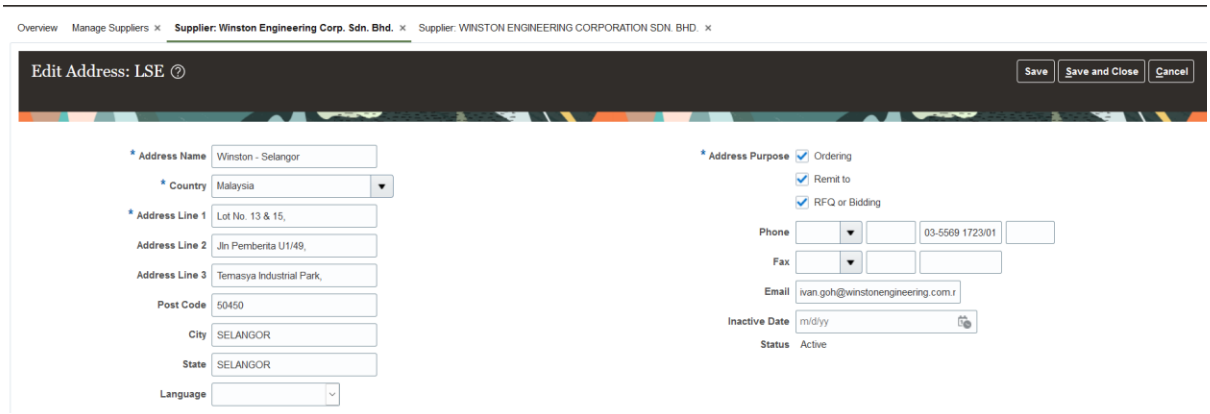


Figure 8 Creating Address

Address name can be defined as per below:

- Company Initial – City Name e.g.: OT-KL

You can create Supplier Address in the Addresses tab, Tick on **Ordering** and **Remit to** on the Address Purpose since this address will be choose as ordering and pay to site. You can also capture the phone number, fax number, email ID. And if this address is going to become inactive at any stage, you can provide an inactive date.

On the lower section of this page, you can also fill more address details for that supplier Address such as Sites, Transaction Tax, Contacts and Payment.

Once all information needed are filled click on **Save and Close.**

Sites

On the Sites Tab, you can add procurement business unit. The sites represents a business relationship between a procurement business unit (BU) and the supplier. A procurement BU represents a specific purchasing or sourcing organization that is responsible for establishing and maintaining supplier relationships. The site, therefore, allows a specific procurement BU to set terms, controls, and policies which govern how procure to pay transactions are executed between its client BUs and the supplier.

Many of these site attributes are optional, and only need to be set when there is need to deviate from a BU level policy, for example the supplier might require more restrictive receipt and invoice tolerances. Procurement policy terms and controls that are defined for a supplier are maintained at the supplier site level.

Sites Tab

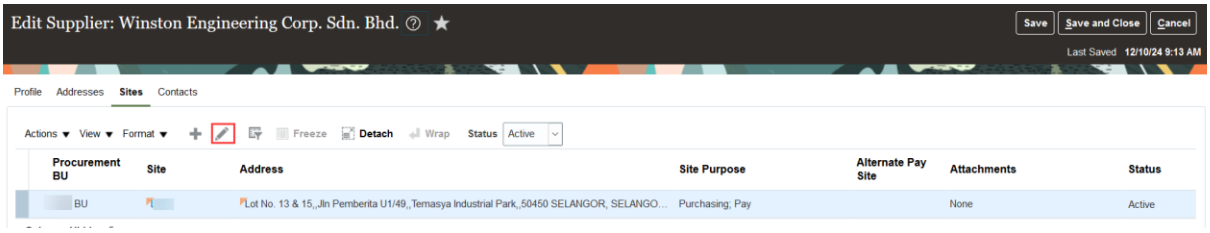


Figure 9 Edit Sites

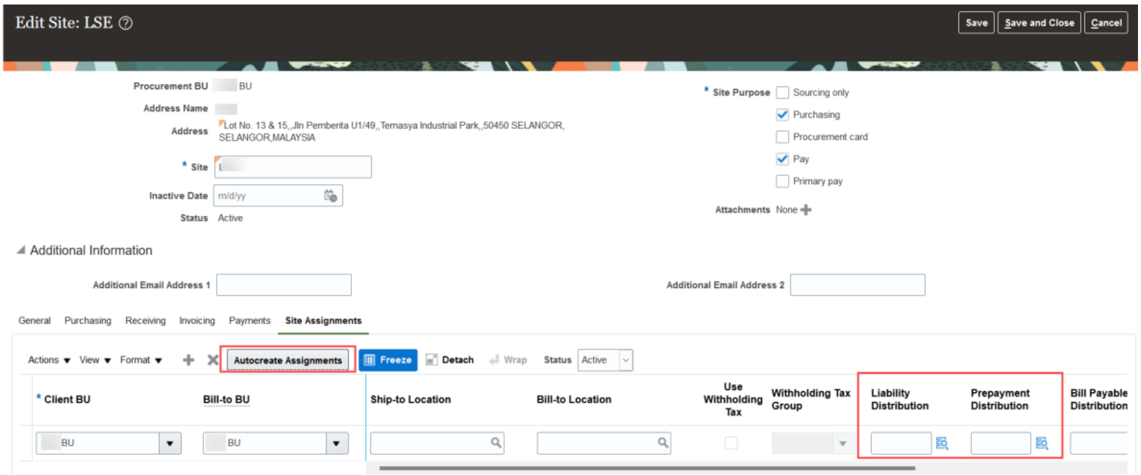


Figure 10 Creating site

On the Sites Tab, you can assign business units to a site from this tab. The business unit you attach is going to be the procurement business unit and treated as purchasing/ pay/ primary pay site by enabling purchasing/ pay/ primary pay flag.

On the lower section of this page, you can also fill more Site details for that supplier such as General, Purchasing, Receiving, Invoicing, Payments and Site Assignments.

Then you can provide the contact information.

Once all information needed are filled click on **Save and Close.**

To enter Payment Details:

No.	Steps
1.	From Supplier Sites Tab, Navigate to **Payments.**
2.	Click On **Payment Methods**, Choose the Default Method of Payment and Click on to default. By default, it will automatically default on 'Check'
3.	Click On **Bank Accounts**, Enter Supplier Bank Account Details
4.	**Enter Payment Attributes**. For electronic payment method, you can provide the payment delivery. You can provide information such as a delivery channel, bank instructions one and two, bank instruction details, settlement priority, payment test message one, two, and three,

	and service level
5.	Once all information needed are filled click on **Save and Close.**

Table 11 Enter Payment Details

To create Bank Account:

No.	Steps
6.	From Supplier Sites Tab, Navigate to **Payments.**
7.	Click On **Bank Accounts** Choose create icon 
8.	**Enter Bank Account Attributes**.
9.	Once all information needed are filled click on **Save and Close.**

Table 12 Create Bank Account

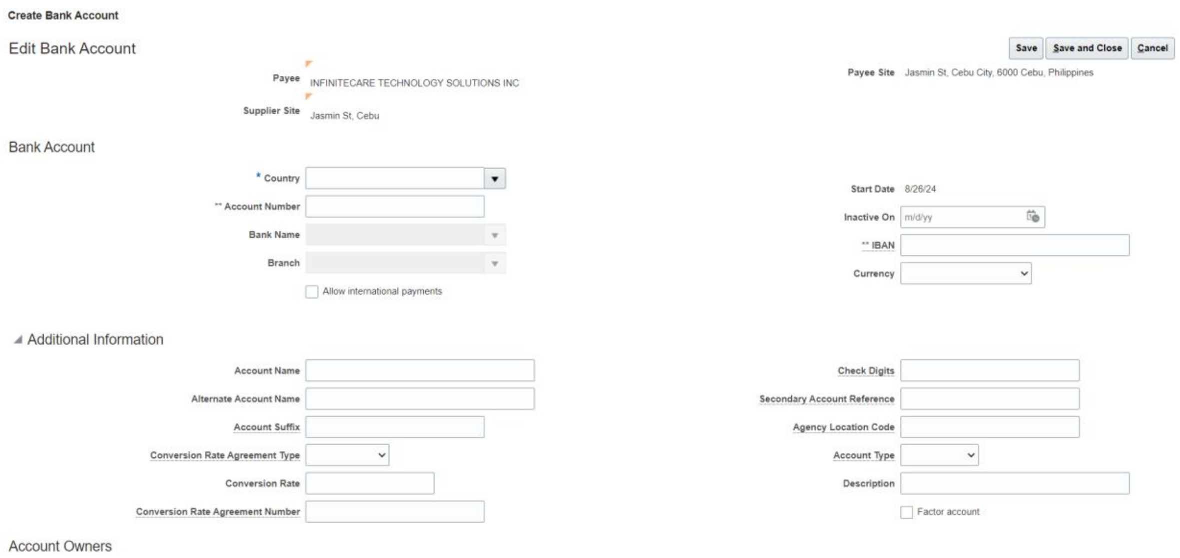


Figure 11 Create Bank Account

To create Site Assignments:

For adding client business unit, you may click on add icon and enter the parameters such as Bill-to-Bu, Bill-to location, Ship-to location liability Distribution and Prepayment distribution

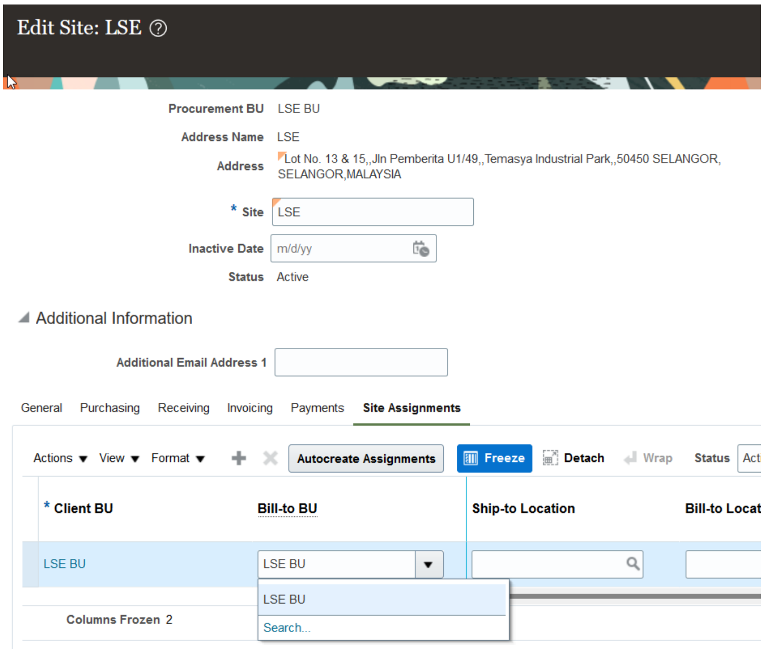


Figure 12 Enter Bill-to BU attribute

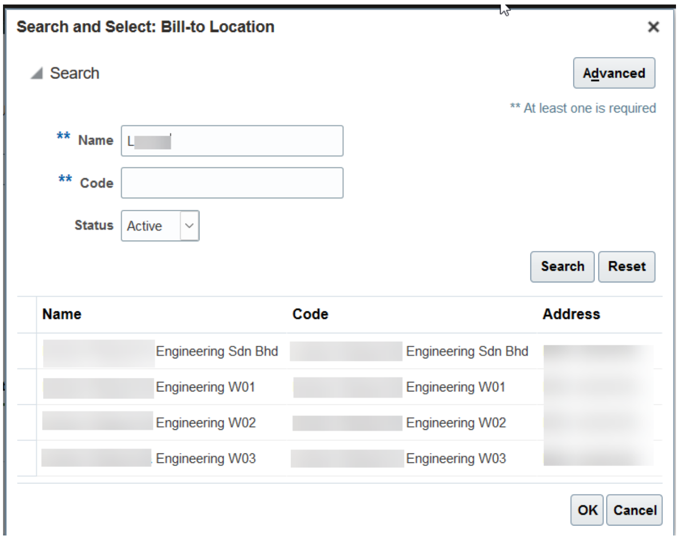


Figure 13 Enter Bill-to-Location attribute

Bill-to- Location and Ship-to-Location, if the supplier only needs to supply the item to ONLY 1 location, this set up is needed. If the supplier

Liability Distribution and Prepayment Distribution is needed to set because this will be contra account for the invoice creation for the supplier.

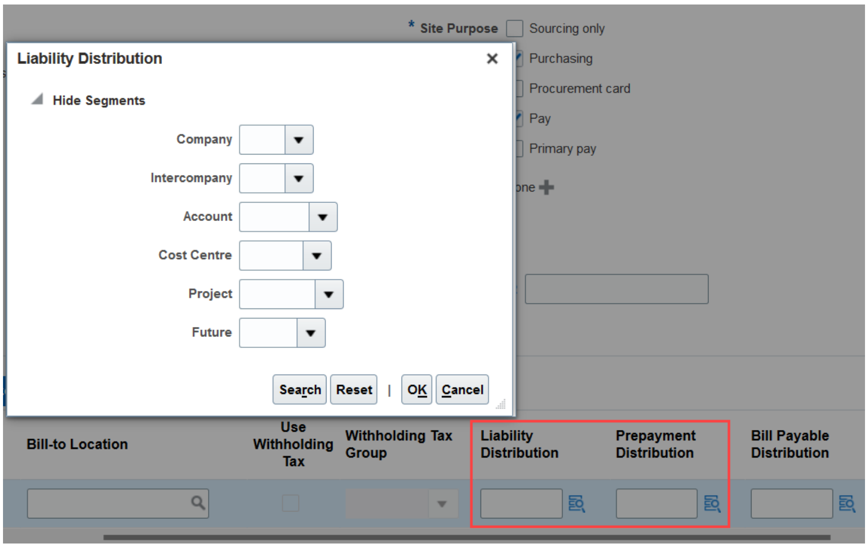


Figure 14 Enter Liability Distribution attribute

<u>Contacts Tab</u>

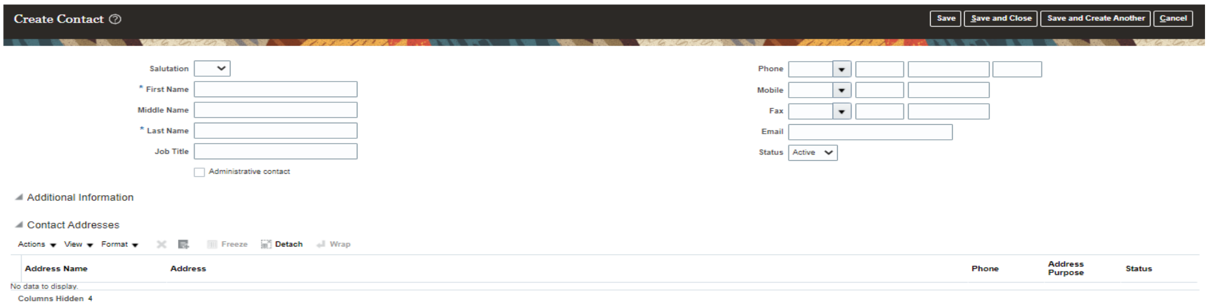


Figure 15 Creating contact

On the contact tabs you can define the contacts. Contacts can also be defined either at the supplier profile level or at the site level. Contacts setup at the supplier profile level represents the supplier and all the sites. Sites-level contacts represent only that address. You can use the contacts to capture name, job title, email IDs.

Once done click on **Save and Close.**

End of Document