2018

iSupplier Training Manual

CHARTER STEEL |

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Supplier 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.

(Example of Email Below)

From: Workflow Mailer <*****@chartermfg.com>
Reply-To: <*****@chartermfg.com>
Date: Wednesday, February 07, 2018 at 11:01 AM
To: John Doe <johndoe@xyz.com>
Subject: FYI: Charter Manufacturing Supplier Collaboration Network: Confirmation of Registration

To	**JOHN DOE**
Sent	**10-JAN-2018 10:00:00**
ID	**2692391**

You have been registered at Charter Manufacturing for access to their supplier collaboration network. You can log on with the username johndoe@XYZ.COM and the password Oi3^AD63.

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

Thank you.

Login to Portal

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

Select Login

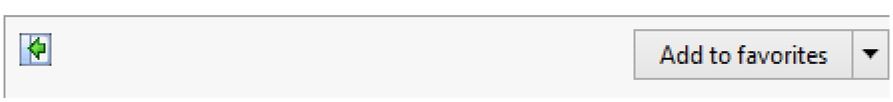
The system will immediately ask you to change your password.

Password rules:

1) Contains at least one letter AND at least one number
2) Cannot contain the username
3) Cannot contain any repeating characters
4) Length is at least 7 characters
5) Cannot be repeated within 12 months
6) Expires every 90 days

Save iSupplier **website** to your favorites

https://cs-supplier.chartermfg.com/OA_HTML/AppsLocalLogin.jsp



Request Additional Users

Businesses who wish to have multiple users access the iSupplier Portal can register by completing the Supplier User Registration Page.

1. **Click on Administration Tab** (Example Below)

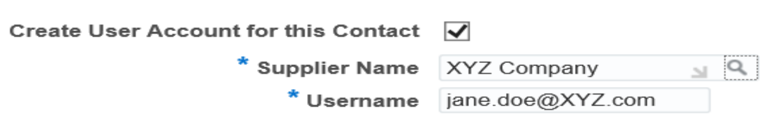
Select Contact Directory

2. **Select Create**

3. **Enter User information** (Example Below)

4. **Select Create User Account for this contact** (Example Below)

5. **Enter Supplier Name** (Example Below)



6. **Select Apply** (Example Below)

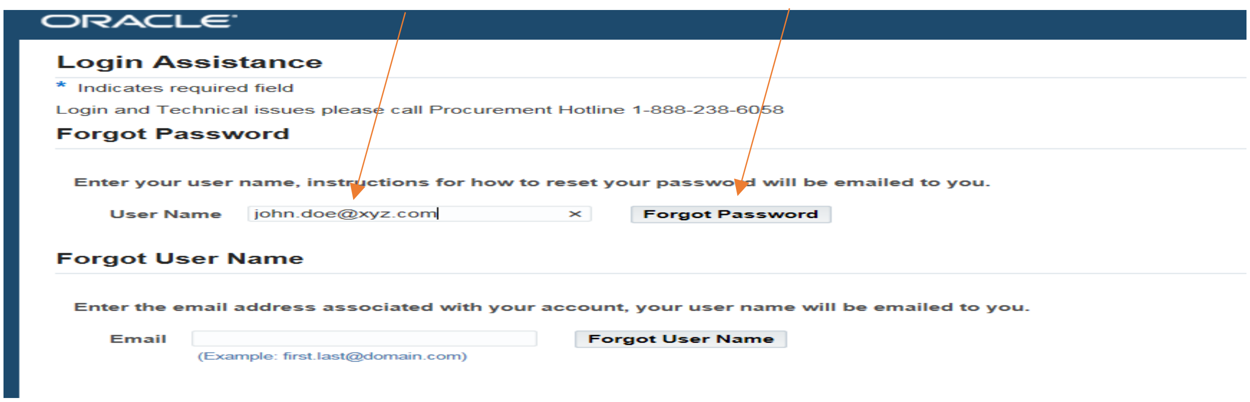
Request will be sent to Charter Manufacturing. Once request is approved user will receive Charter Manufacturing Supplier Collaboration Network: Confirmation of Registration. User will logon with the username and password provided in email. When user first logs on, they will be required to change password for security purposes

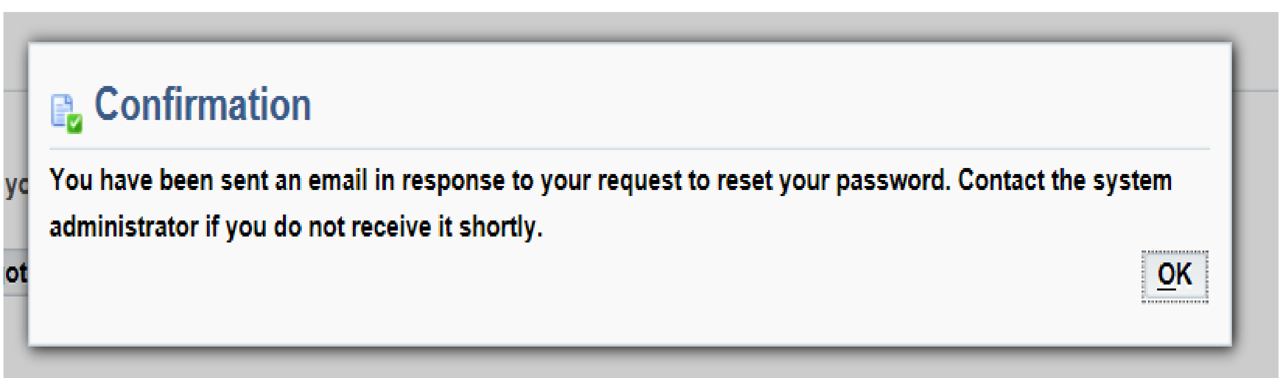
Request Password Reset

Users can reset the password with the Login Assistance from the main page or by Contacting the Procurement Hotline 1-888-238-6058

1. **Click Login Assistance** (Example Below)

2. **Enter User Name (Email Address) and Select Forgot Password**





Purchase Orders

Viewing Purchase Orders

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

1. **Login to Supplier Portal and Orders at a Glance will be displayed on Supplier Home Page (Example Below)**

Orders At A Glance

Full List

PO Number	Description	Order Date
678611	T&M #: 21715 Description eplace #1 Lift Cylinder on the Cooling Bed	02-Feb-2018 14:25:53
678610	T&M #: 217150-98286 Replace #1 Lift Cylinder on the Cooling Bed	02-Feb-2018 10:29:13
676676	No.98237 Repairs to 21r shear pit walls	25-Jan-2018 11:01:14
678498	T&M #: 217150-98286 Replace #1 Lift Cylinder on the Cooling Bed	23-Jan-2018 14:44:54
678496	T&M #: 217150-98285 Inspections to #3 EAF Electrode Arm	23-Jan-2018 14:42:07

2. **Click on PO number to view detailed information. If purchase order is not displayed select Full List** (Example Below)

Orders At A Glance

Full List

PO Number	Description	Order Date
678611	T&M #: 21715 Description eplace #1 Lift Cylinder on the Cooling Bed	02-Feb-2018 14:25:53
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678496	T&M #: 217150-98285 Inspections to #3 EAF Electrode Arm	23-Jan-2018 14:42:07

Purchase Order Acknowledgement

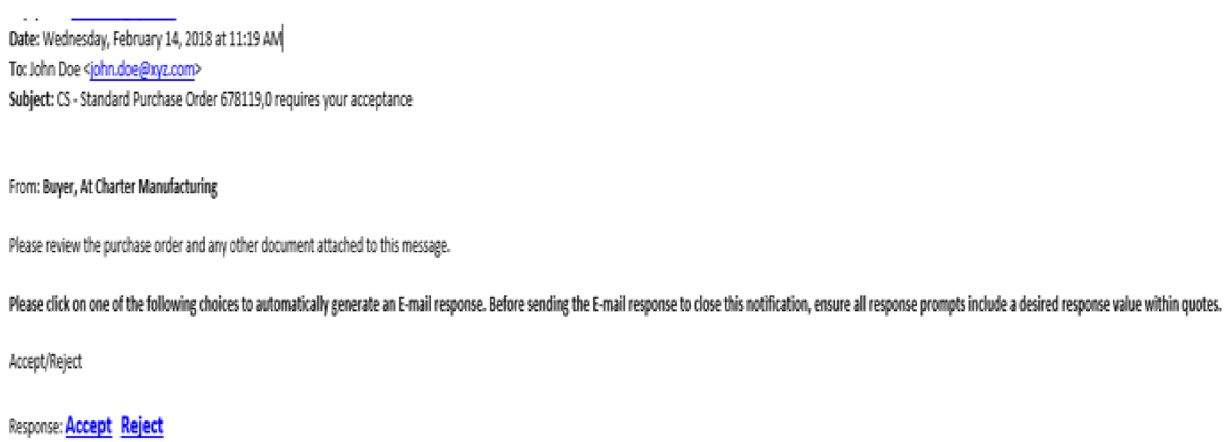
You will acknowledge purchase orders to communicate to Charter Manufacturing that you have received, reviewed the details of, and accepted or rejected a purchase order. You can also communicate changes to the purchase order during acknowledgment. You can either acknowledge the order online, or accept or reject the order using the notification.

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.

1. **Purchase Order Acknowledgement using Email Notification** (Example Below)

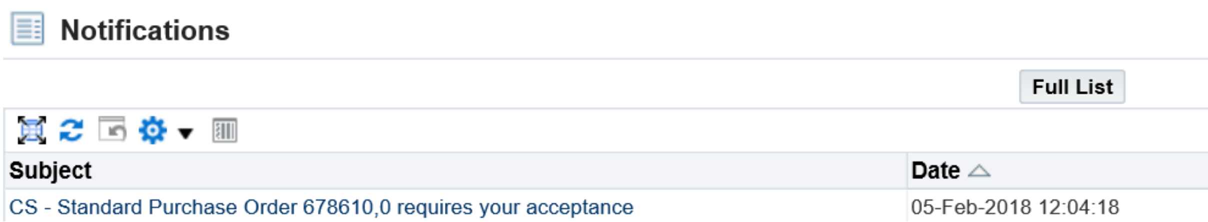
Select PDF Documents in References to view purchase order details (Example Below)



2. **After viewing Purchase Order Select Accept or Reject Order** (Example Below)

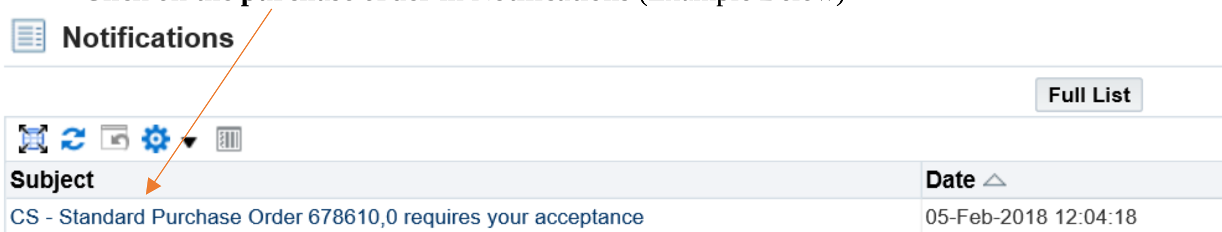
Purchase Order Acknowledgement using iSupplier Portal

1. **Notification page in iSupplier Portal** (Example Below)

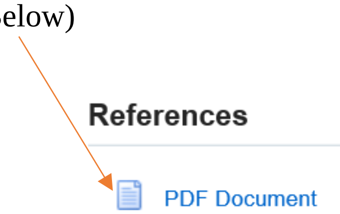


2. **Responding to Purchase Order Acknowledgement**

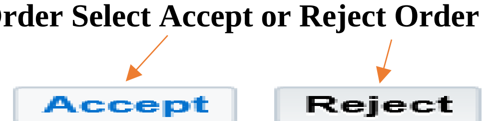
   Click on the purchase order in Notifications (Example Below)



3. **Select PDF Documents in References to view purchase order details** (Example Below)



4. **After viewing Purchase Order Select Accept or Reject Order** (Example Below)

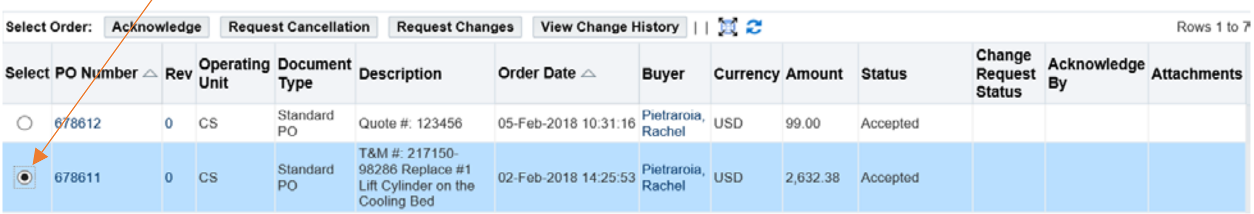


Submitting Change Requests

The Oracle iSupplier Portal enables you to request changes to purchase orders when modifications are needed to fulfill an order. Changes can be made during or after acknowledgement.

1. **Select Orders Tab** (Example Below)

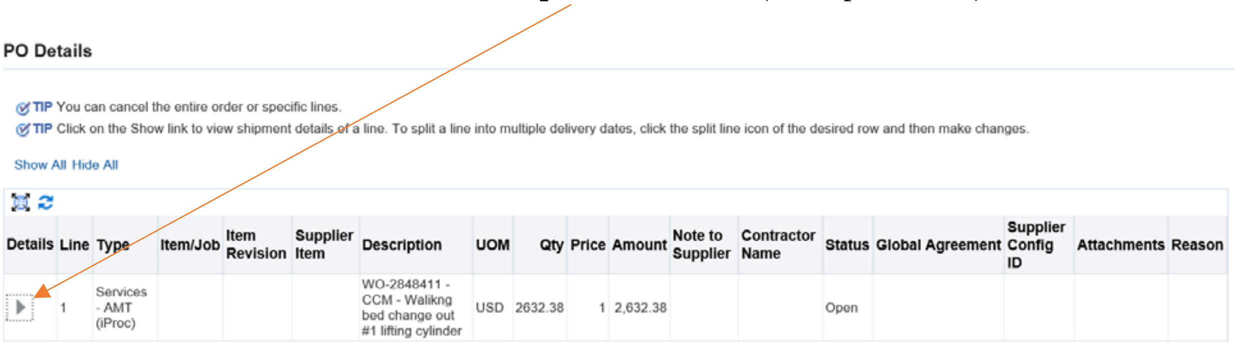
Select the order that needs changes (Example Below)



Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Change Request Status	Acknowledge By	Attachments
○	678612	0	CS	Standard PO	Quote #: 123456	05-Feb-2018 10:31:16	Pietraroia, Rachel	USD	99.00	Accepted			
◉	678611	0	CS	Standard PO	T&M #: 217150-98286 Replace #1 Lift Cylinder on the Cooling Bed	02-Feb-2018 14:25:53	Pietraroia, Rachel	USD	2,632.38	Accepted			

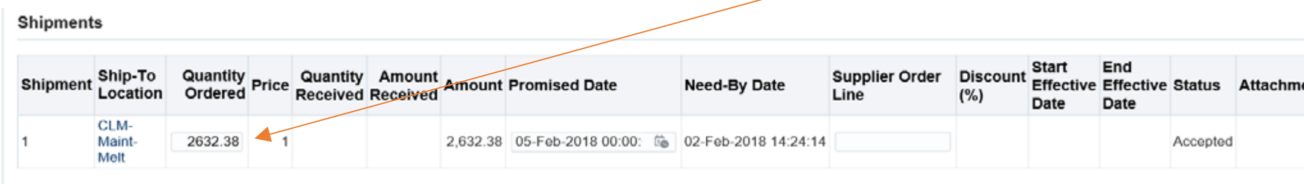
2. **Select Request Changes** (Example Below)

3. **Scroll down to Po Details and Expand the arrow** (Example Below)



Details	Line	Type	Item/Job	Item Revision	Supplier Item	Description	UOM	Qty	Price	Amount	Note to Supplier	Contractor Name	Status	Global Agreement	Supplier Config ID	Attachments	Reason
▶	1	Services - AMT (iProc)				WO-2848411 - CCM - Walikng bed change out #1 lifting cylinder	USD	2632.38	1	2,632.38			Open				

4. **Change price or order quantity enter the changes requested in Quantity Ordered field** (Example Below)

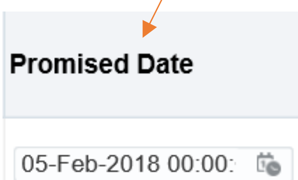


Shipments

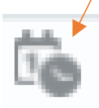
Shipment	Ship-To Location	Quantity Ordered	Price	Quantity Received	Amount Received	Amount	Promised Date	Need-By Date	Supplier Order Line	Discount (%)	Start Effective Date	End Effective Date	Status	Attachmei
1	CLM-Maint-Melt	2632.38	1			2,632.38	05-Feb-2018 00:00:	02-Feb-2018 14:24:14					Accepted	

5. **Change Promise Date**

Click in Promise Date Field (Example Below)



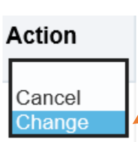
6. **Select calendar and select a different date** (Example Below)



7. **Enter Reason for changes** (Example Below)

Scroll to the right until you see Reason Field. Click in Reason Field and provide reason for changes. (Example Below)

8. **Click in Action Field and select Change** (Example Below)



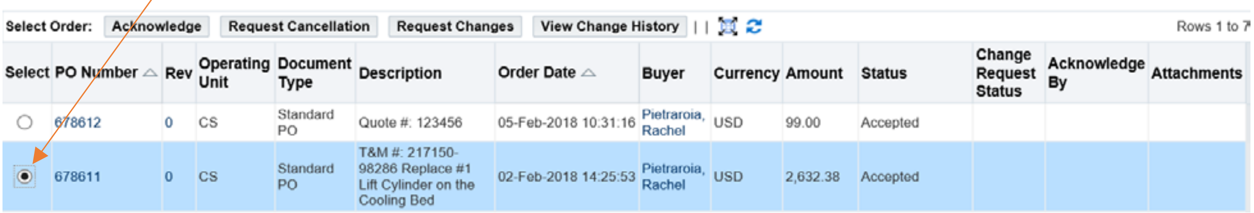
9. **Select Submit** (Example Below)

Cancelling Orders

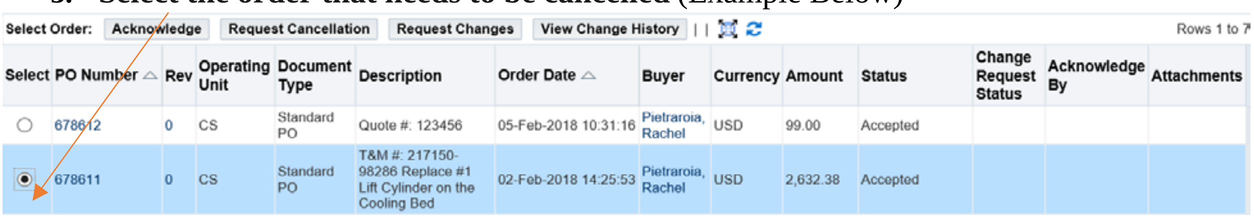
The Oracle iSupplier Portal enables you to cancel purchase orders

1. **Select Orders Tab** (Example Below)

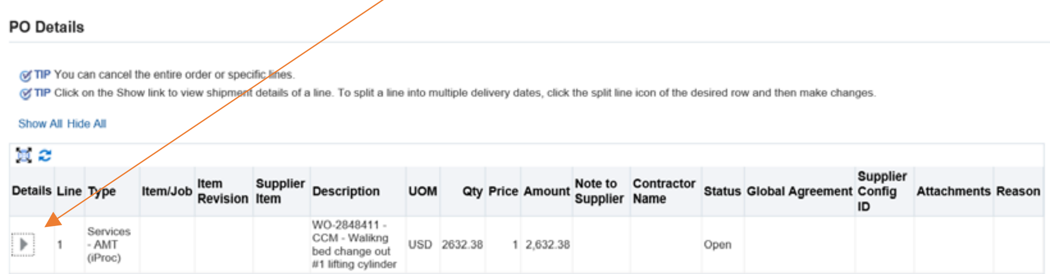
2. **Select the order that needs changes** (Example Below)



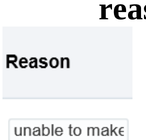
3. **Select the order that needs to be cancelled** (Example Below)



4. **Scroll down to Po Details and Expand the arrow** (Example Below)

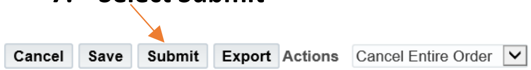


5. **Scroll to the right until you see Reason Field. Click in Reason Field and provide reason for cancellation.** (Example Below)



6. **Select Request Cancellation .** (Example Below)

7. **Select Submit**



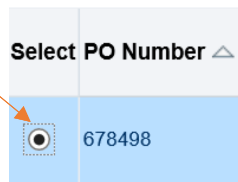
Viewing Purchase Order information

View Change History

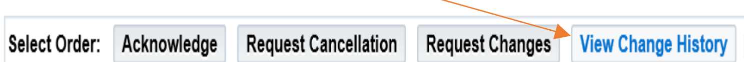
The Purchase Order Revision History page enables you to view and search for purchase history details

1. **Select Orders Tab** (Example Below)

2. **Select Purchase Order Number** (Example Below)



3. **Select View Change History** (Example Below)



4. **Change History will display** (Example Below)

Details	Request Date	Line	Shipment	Item	Supplier Item	Description	Qty	UOM	Price / Rate	Amount	Promised Date	Need-By Date
	08-Feb-2018 08:59:24	1	1			WO-2848411 - CCM - Walikng bed change out #1 lifting cylinder	2632.... 5200	USD			05-Feb-2018 00:00:00 23-Feb-2018 08:58:54	25-Jan-2018 00:00:...

Requested By XYZ Company
Change Reason extra work done

View Invoices

The view invoices page enables you to search for and view details of an invoice.

1. **Select Finance Tab** (Example Below)

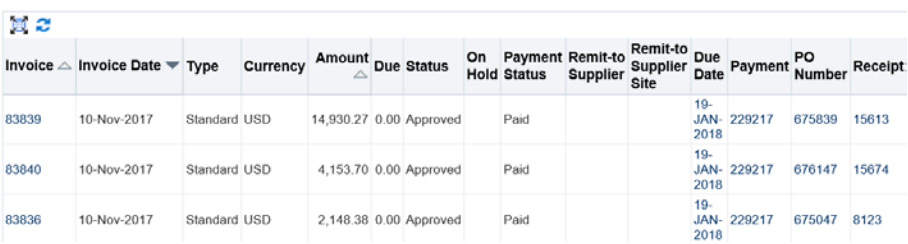
You can search using any or all of the search criteria on the page including:

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

2. **Enter Search Parameter** (Example Below)

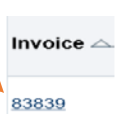
3. **Select Go** (Example Below)

4. **Payment details will be listed on portal page** (Example Below)



Invoice	Invoice Date	Type	Currency	Amount	Due	Status	On Hold	Payment Status	Remit-to Supplier	Remit-to Supplier Site	Due Date	Payment	PO Number	Receipt
83839	10-Nov-2017	Standard	USD	14,930.27	0.00	Approved		Paid			19-JAN-2018	229217	675839	15613
83840	10-Nov-2017	Standard	USD	4,153.70	0.00	Approved		Paid			19-JAN-2018	229217	676147	15674
83836	10-Nov-2017	Standard	USD	2,148.38	0.00	Approved		Paid			19-JAN-2018	229217	675047	8123

5. **Select invoice number to view invoice information** (Example Below)

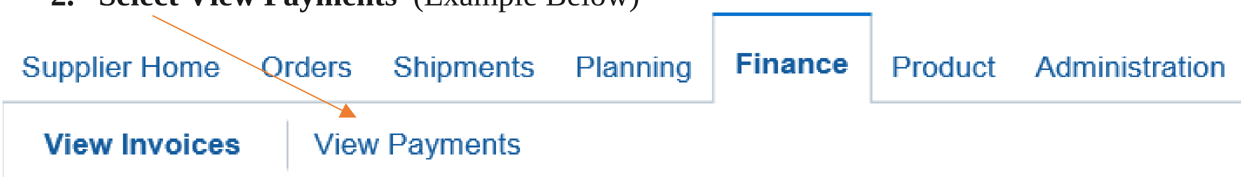


View Payment Information

Payment inquiry enables you to view the history of all the payments to your invoices completed by Charter Manufacturing.

1. **Select Finance Tab** (Example Below)

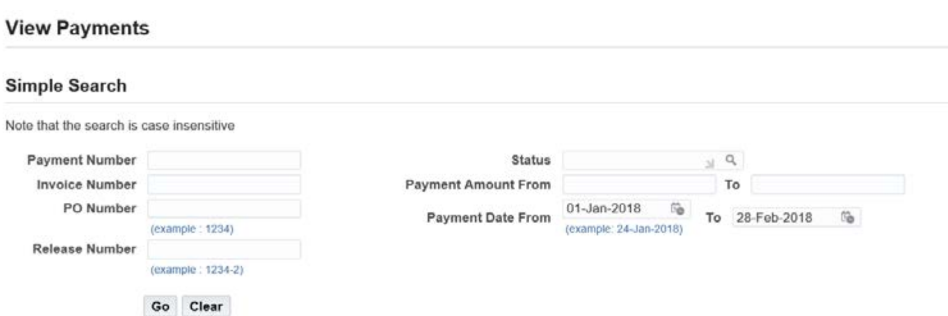
2. **Select View Payments** (Example Below)



You can use the View Payments page to search using various search criteria, including:

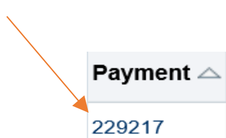
- Payment number
- Invoice number
- Payment date
- Purchase order number

3. **Enter Search Parameter** (Example Below)



4. **Select Go** (Example Below)

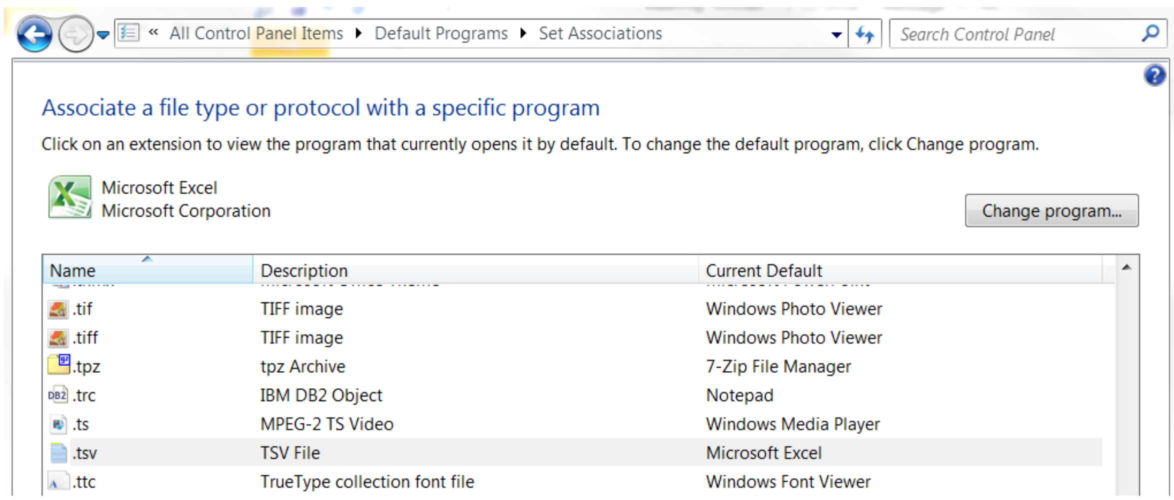
5. **Select Payment number to view payment information** (Example Below)



Export Documents

There will be a 1 time setup to associate the .tsv file with an application

1. Open Default Programs by clicking the Start button.
2. Click Associate a file type or protocol with a program.
3. Click the .tsv file type.



4. Click Change program.
5. Select Excel or Browse for the Excel location.