

2018

iSupplier Training Manual

CHARTER STEEL |

Table of Contents

Supplier Registration	2
iSupplier Registration	2
Login to Portal	3
Request Additional Users	4
Request Password Reset	5
Purchase Orders	6
Viewing Purchase Orders	6
Purchase Order Acknowledgement	7
Purchase Order Acknowledgement using Email Notification	7
Purchase Order Acknowledgement using iSupplier Portal	8
Submitting Change Requests	9
Cancelling Orders	11
Viewing Purchase Order information	12
View Change History	12
View Invoices	13
View Payment Information	14
Export Documents	15

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**

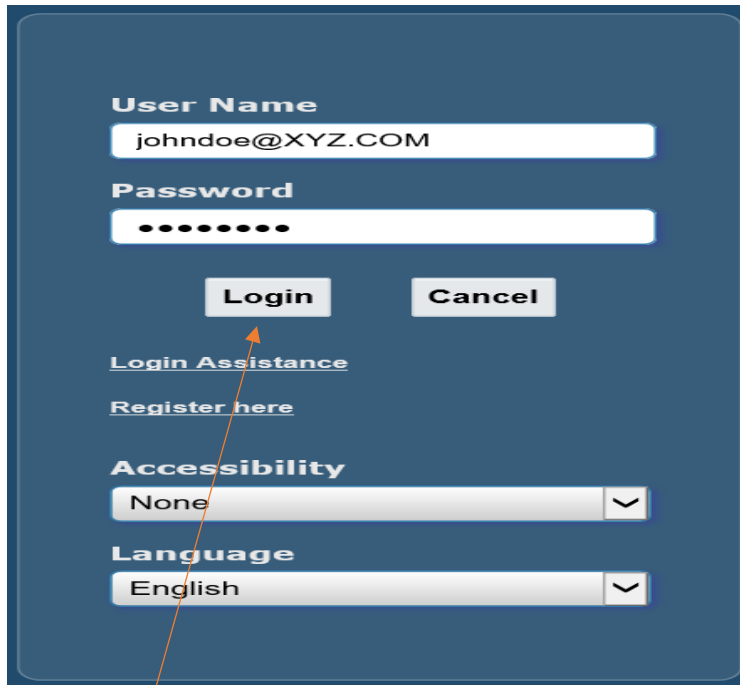
You have been registered at Charter Manufacturing for access to their supplier collaboration network. You can [log on](#) with the username johndoe@XYZ.COM and the password Oi3^AD63.

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.



The screenshot shows a login portal with a dark blue background. It includes fields for 'User Name' (containing 'johndoe@XYZ.COM') and 'Password' (masked with dots). Below these are 'Login' and 'Cancel' buttons. Further down are links for 'Login Assistance' and 'Register here', and dropdown menus for 'Accessibility' (set to 'None') and 'Language' (set to 'English'). An orange arrow points from the bottom left towards the 'Login' button.

Select Login

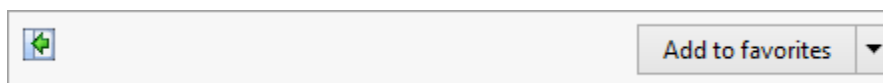
The system will immediately ask you to change your password.

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



The image shows a browser address bar with a small icon on the left and a button labeled 'Add to favorites' with a dropdown arrow on the right.

Request Additional Users

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

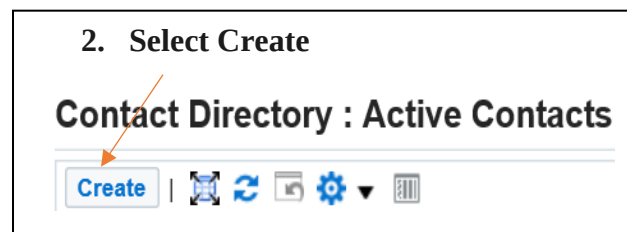
1. Click on Administration Tab (Example Below)

Administration

Select Contact Directory



2. Select Create



3. Enter User information (Example Below)

Administration: Profile Management: Contact Directory >
Add Contact Cancel Apply

* Indicates required field

Contact Title	Ms. ☐	Phone Area Code	262
First Name	Jane	Phone Number	268
Middle Name		Phone Extension	2325
* Last Name	Doe	Alternate Phone Area Code	
Alternate Name		Alternate Phone Number	
Job Title	Vice President	Fax Area Code	
Department	Supply Chain	Fax Number	
Email Address	jane.doe@XYZ.com	Inactive Date	
Url			(example: 29-Jan-2018 19:45:00)

User Account

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

Create User Account for this Contact ☒

5. Enter Supplier Name (Example Below)

Create User Account for this Contact ☒

* Supplier Name

* Username

6. Select Apply (Example Below)

Apply

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

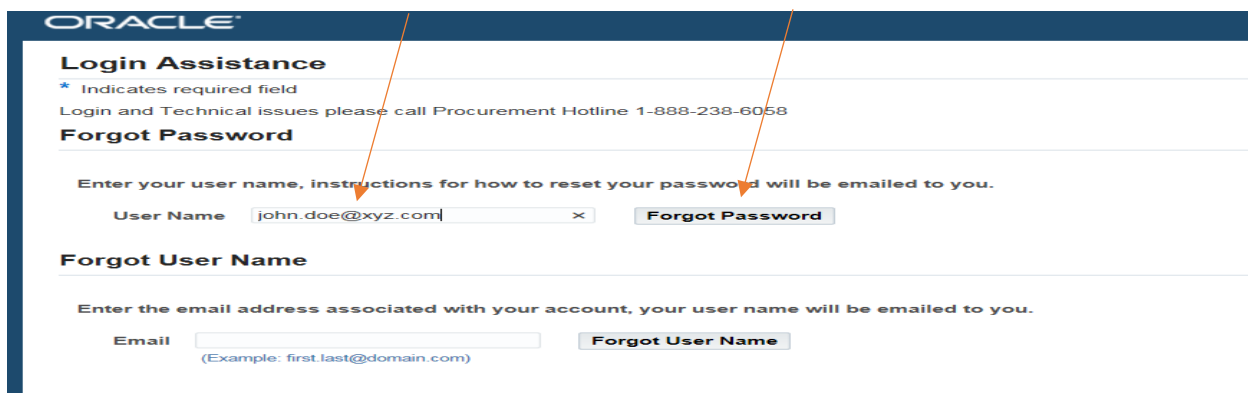
Users can reset the password with the Login Assistance from the main page or by Contacting the Procurement Hotline 1-888-238-6058

1. Click Login Assistance (Example Below)

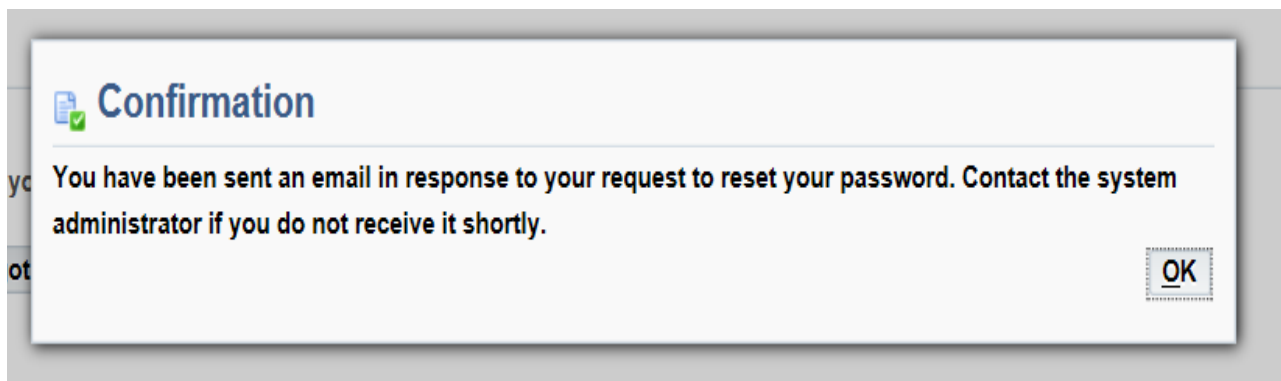


The screenshot shows a dark blue login form. At the top are fields for 'User Name' and 'Password', followed by 'Login' and 'Cancel' buttons. Below these is a link for 'Login Assistance' which is highlighted by an orange arrow. Other links include 'Register here'. At the bottom are dropdown menus for 'Accessibility' (set to 'None') and 'Language' (set to 'English').

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



The screenshot shows the Oracle 'Login Assistance' page. It includes a header with the Oracle logo and a note: '* Indicates required field'. Below this is a text line: 'Login and Technical issues please call Procurement Hotline 1-888-238-6058'. The 'Forgot Password' section contains the instruction: 'Enter your user name, instructions for how to reset your password will be emailed to you.' Below this is a 'User Name' field containing 'john.doe@xyz.com' and a 'Forgot Password' button, which is pointed to by an orange arrow. The 'Forgot User Name' section contains the instruction: 'Enter the email address associated with your account, your user name will be emailed to you.' Below this is an 'Email' field with a placeholder '(Example: first.last@domain.com)' and a 'Forgot User Name' button. Another orange arrow points to the 'User Name' field.



The screenshot shows a 'Confirmation' dialog box with a green checkmark icon. The text inside reads: 'You have been sent an email in response to your request to reset your password. Contact the system administrator if you do not receive it shortly.' In the bottom right corner is an 'OK' button.

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 Replace #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 Replace #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

Purchase Order Acknowledgement

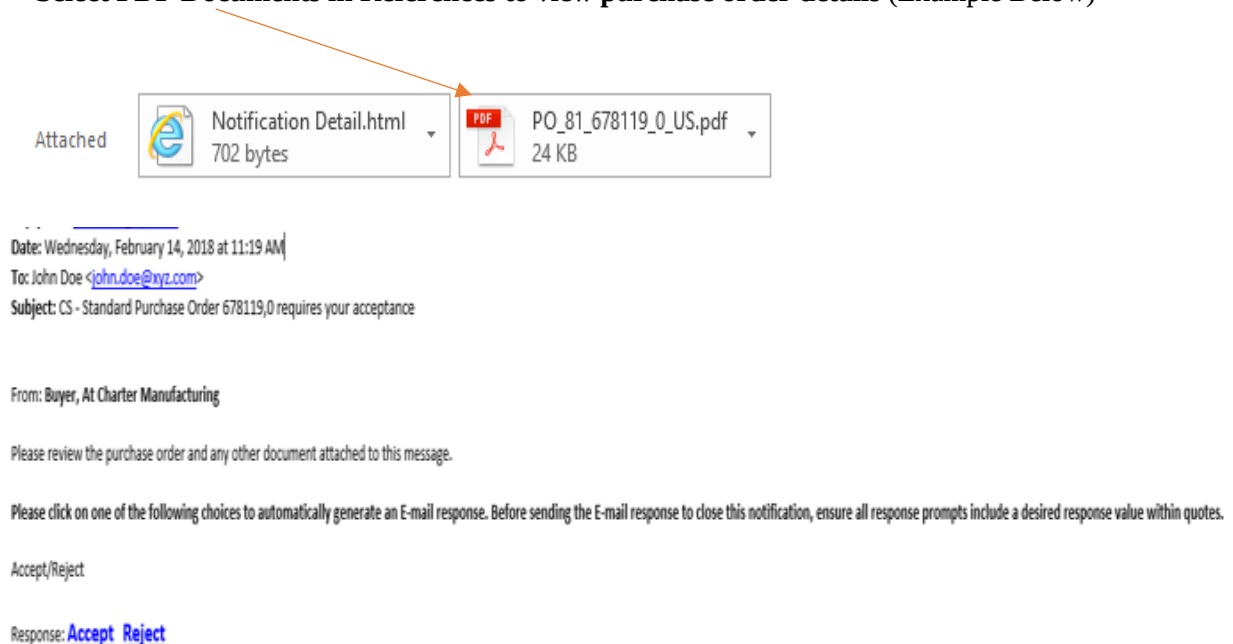
You will acknowledge purchase orders to communicate to Charter Manufacturing that you have received, reviewed the details of, and accepted or rejected a purchase order. You can also communicate changes to the purchase order during acknowledgment. You can either acknowledge the order online, or accept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

Response: [Accept](#) [Reject](#)

Purchase Order Acknowledgement using iSupplier Portal

1. Notification page in iSupplier Portal (Example Below)

Notifications	
Full List	
	
Subject	Date 
CS - Standard Purchase Order 678610,0 requires your acceptance	05-Feb-2018 12:04:18

2. Responding to Purchase Order Acknowledgement

Click on the purchase order in Notifications (Example Below)

Notifications	
Full List	
	
Subject	Date 
CS - Standard Purchase Order 678610,0 requires your acceptance	05-Feb-2018 12:04:18

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

References

 PDF Document

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 Order: Acknowledge Request Cancellation Request Changes View Change History  													Rows 1 to 7	
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)

PO Details

- TIP** You can cancel the entire order or specific lines.
 TIP Click on the Show link to view shipment details of a line. To split a line into multiple delivery dates, click the split line icon of the desired row and then make changes.

Show All Hide All

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 - Waliking 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
1	CLM-Maint-Melt	2632.38	1			2,632.38	05-Feb-2018 00:00:00	02-Feb-2018 14:24:14					Accepted

5. Change Promise Date

Click in Promise Date Field (Example Below)

Promised Date

05-Feb-2018 00:00:00

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)

Reason

Price decrease

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

Action

Cancel
Change

9. Select Submit (Example Below)

Submit

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)

Select Order: Acknowledge Request Cancellation Request Changes View Change History  												Rows 1 to 7	
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			

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

Select Order: Acknowledge Request Cancellation Request Changes View Change History  												Rows 1 to 7	
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			

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

PO Details

TIP You can cancel the entire order or specific lines.
TIP Click on the Show link to view shipment details of a line. To split a line into multiple delivery dates, click the split line icon of the desired row and then make changes.

Show All Hide All

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 - Walking bed change out #1 lifting cylinder	USD	2632.38	1	2,632.38			Open				

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

Reason

unable to make

6. Select Request Cancellation . (Example Below)

Select Order:	Acknowledge	Request Cancellation	Request Changes	View Change History
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7. Select Submit

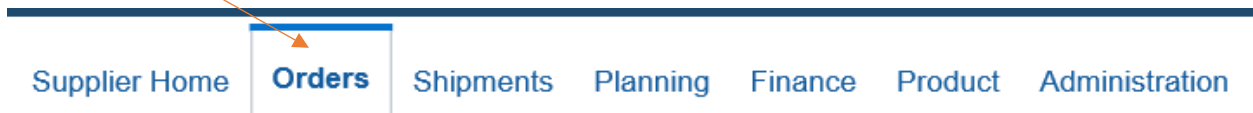
Cancel Save **Submit** Export Actions Cancel Entire Order

Viewing Purchase Order information

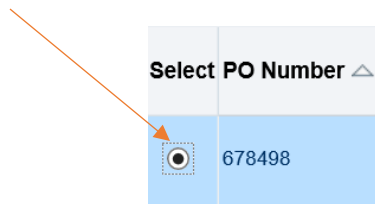
View Change History

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)

Invoice Number		Payment Status	Paid	
PO Number	(example : 1234)	Invoice Amount From		To
Release Number	(example : 1234-2)	Amount Due From		To
Payment Number		Invoice Date From	01-Jan-2018	To 08-Feb-2018
Invoice Status		Due Date From	(example: 24-Jan-2018)	To
Go Clear				

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)



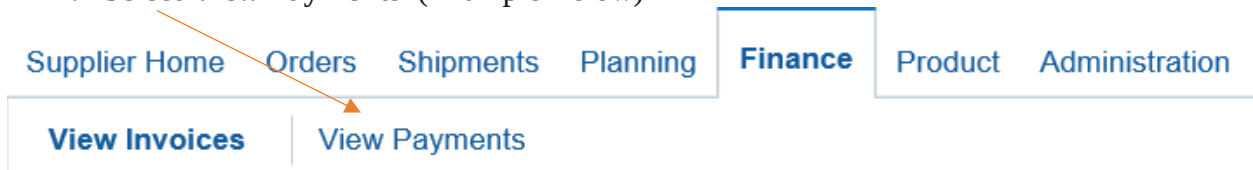
View Payment Information

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)

View Payments

Simple Search

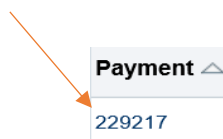
Note that the search is case insensitive

Payment Number		Status	
Invoice Number		Payment Amount From	
PO Number			To
	(example : 1234)	Payment Date From	01-Jan-2018 To 28-Feb-2018
Release Number			(example: 24-Jan-2018)
	(example : 1234-2)		

4. Select Go (Example Below)



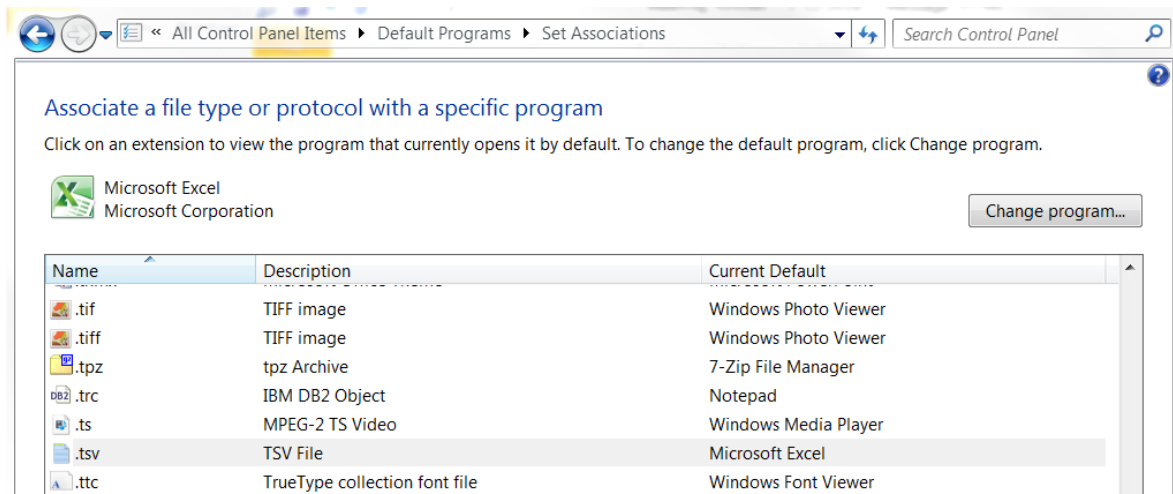
5. Select Payment number to view payment information (Example Below)



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.

