PeopleSoft®

EnterpriseOne JDE5 Supplier Self-Service PeopleBook

May 2002

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Supplier Self-Service PeopleBook
SKU JDE5ESU0502

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Working with User Administration

Before a supplier or customer can begin using the Supplier and Customer Self-Service applications, the enterprise (the company that uses OneWorld) must designate a user at the supplier or customer company who can perform user administration tasks. The user who performs user administration tasks does so only for employees within the user's company. The user administration tasks can include:

- Adding, modifying, and deleting user profiles, which are sets of information for grouping users
- Changing user preferences, such as date format, date separator, language, and country
- Resetting user passwords
- Managing predefined roles, which govern the user's level of access to the portal workspace and portal components

► To add or modify a user profile

From the J.D. Edwards Supplier Portal workspace or the Customer Self-Service Portal workspace, in the Administrator Tasks workspace component, choose Manage User Profiles.

1. On View Company Users, choose the user ID for the user whose profile you are adding or modifying and do one of the following:
    - To add a user profile, click Add.
    - To modify a user profile, click the user ID.
2. On User Information and Preferences, in the User ID section, click Edit.
3. On Manage User's Profile and Preferences, complete the following fields and click Submit:
    - Language
    - Date Format
    - Date Separator Character
    - Decimal Format Character
    - Country
4. On User Information and Preferences, click Close.
5. On View Company Users, click Close.

► To delete a user profile

From the J.D. Edwards Supplier Portal workspace or the Customer Self-Service Portal workspace, in the Administrator Tasks workspace component, choose Manage User Profiles.

1. On View Company Users, enter the user ID that corresponds to the user profile that you want to delete and click Search. To display all user profiles, click Search.

2. Click Delete in the Action field for the user whose user profile you wish to delete.

   In OneWorld, the system deletes the user profile information in the Security table (F98OWSEC) and Role Relationships table (F95921).

► To modify role relationships

From the J.D. Edwards Supplier Portal workspace or the Customer Self-Service Portal workspace, in the Administrator Tasks workspace component, choose Manage User Profiles.

1. On View Company Users, choose the user ID of the user whose role relationships you wish to modify.
2. On User Information and Preferences, click Edit in the User/Role Relationships section.
3. On Manage User's Role Relationships, choose the roles that you wish to assign or remove, click Assign or Remove in the Action column, and then click Close.
4. On User Information and Preferences, click Close.
5. On View Company Users, click Close.

► To modify a user password

From the J.D. Edwards Supplier Portal workspace or the Customer Self-Service Portal workspace, in the Administrator Tasks workspace component, choose Manage User Passwords.

1. On View Company Users, choose the user ID of the user whose password you want to modify, and then click Modify in the Password column.
2. On Administrative Password Revisions, complete the following fields, and then click Submit:
   - New Password
   - New Password Verify

   The system saves the new password.
3. On View Company Users, click Close.

Portal Workspaces

If your system administrator has granted you the ability to personalize workspaces, you can add new workspaces to the Portal.

The workspace that you create is not public; that is, only you can see it. However, you can grant other individuals the following kinds of rights to your workspace:

- View

  Individuals who have View rights can see your workspace and personalize the appearance on their workstations. They cannot affect the workspace in any other way.

- View/Edit

  Individuals who have View/Edit rights can view and make changes to the workspace.

- View/Edit/Grant Permissions

  Individuals who have View/Edit/Grant Permissions rights can view and change the workspace, and can also grant rights to other individuals.

You can personalize your workspaces. From the Personalize form, you can change the following characteristics for a workspace:

- Workspace unique ID (Workspace Name)
- Environments in which the workspace can appear (PC, Windows CE, Pocket PC)
- Title
- Components (add, remove, rearrange)
- Columns (add, remove)
- Workspace Navigation Bar links
- Colors
- Background image
- Toolbar logo and background image
- Access privileges

To personalize a workspace, you must have a View/Edit rights to the workspace. You alone are granted View/Edit/Grant Permissions rights automatically with any workspace you create. You might not have access privileges to some public workspaces.

Personalizing Supplier Self-Service Information

If your system administrator has granted you the ability to personalize components, you can personalize information within the following workspace components (consider that your unique workspace may not contain all of the following workspace components):

- Supplier Performance Analysis
- Supplier Order Status
- Quote Status

For some workspace components, the system offers the option of restoring any settings that you change to the default settings. An alternative to restoring default settings is to exit without saving your changes.

In the Supplier Performance Analysis workspace component, you can click the Personalize icon to specify the following information:

- For a quality analysis, you can specify percentages and quantities for ranges that determine good and bad performance for a supplier in key performance indicators (KPIs) such as Quantity Returned to Supplier.
- For a delivery analysis, you can specify percentages and lead time figures for ranges that determine good and bad performance for a supplier in KPIs such as Quantity Late Percentage.
- For a cost analysis, you can specify payment and cost amounts for ranges that determine good and bad performance for a supplier in KPIs such as Average Cost Paid.

In the Supplier Order Status workspace component, you can click the Personalize icon to specify the number of days in the future up to which you want to review orders that are going to be delivered. The system uses the number that you specify to determine when to provide you with an alert. For example, you might want to view order information only for orders that are going to be delivered within the next 10 days.

In the Quote Status workspace component, you can click the Personalize icon to specify the number of days in the future for viewing quote responses that are due. You can also specify the number of days in the past for viewing quote requests that have been received. The system uses the number that you specify to determine when to provide you with an alert. For example, you might want to review only those quotes for which responses are due within the next 10 days.

Overview of Supplier Self-Service

J.D. Edwards Supplier Self-Service enables you to allow your suppliers to access timely and accurate information about their order at their convenience, without having to wait for a response from purchasing. When you allow suppliers quick and cost-effective access to your enterprise information, not only are you making it easier for suppliers to conduct business with you, but you are also increasing your supply chain efficiency and improving your relationships with suppliers.

Supplier Self-Service provides you with search capabilities on quotes, purchase orders, inventory, schedules, and account information, and displays alerts to inform you when a quote response is due or when an important purchase order date is arriving.

You access all Supplier Self-Service applications through the J.D. Edwards Supplier Portal workspace. The J.D. Edwards Supplier Portal workspace contains various components that enable you to access certain applications in different ways. For example, you might choose the appropriate task, search for specific information before accessing the application, or receive alerts that you can use to access the application. For more information on the workspace and components, see the *OneWorld Portal Guide*.

To further understand all of the benefits of using Supplier Self-Service, review the following topics:

- Displaying and responding to purchase order quotes
- Displaying and managing purchase order information
- Notifying customers of orders in transit
- Displaying supplier inventory information
- Displaying and responding to supplier release schedules
- Reviewing accounts payable information
- Displaying supplier performance
- Managing supplier information

Before you begin using Supplier Self-Service, review the following topic:

- Working with user administration

Daily

Displaying and Responding to Purchase Order Quotes

Suppliers can use self-service to review and respond to supply chain information in a timely manner. In a typical trading environment, customers (buyers) and suppliers must exchange information about quotes. Before a customer purchases goods, the customer typically sends a quote, which is a request for a price and delivery estimate, from various suppliers. Suppliers respond to the quote by entering a price and delivery date in the system. The price and date are electronically communicated to the customer. The customer then receives an alert that prompts the customer to either accept or reject the quote.

See Also

- *Entering Items for Which to Request Quotes* in the *Procurement Guide*
- *Entering Suppliers to Provide Quotes* in the *Procurement Guide*
- *Creating Orders from Price Quotes* in the *Procurement Guide*

► To review quote information

From the J.D. Edwards Supplier Portal workspace, use one of the following navigations:

In the Search workspace component, enter Quotes by Item No. in the Search field, enter an item number in the adjacent field, and then click Go. This search enables you to locate a specific item number.

In the Search workspace component, enter Quotes in the Advanced Search field, click Go, and then complete the advanced search information.

In the Quote Status Alerts workspace component, click the value in either the Responses Due field or Requests Received field. If the value is zero, the system displays the View Quote Header Information form and indicates that no records are displayed because there are no responses due or no requests received, respectively.

1. If you are working with quote status alerts, the View Quote Header Information form appears. You can review the quote numbers, descriptions, and the number of detail lines for each quote. If you are not working with quote alerts, proceed to step 3.
2. To review detailed information for a specific quote, click the quote number.
3. On View Quote Detail Information, refine the information for which the system searches by choosing the appropriate options by which to view and sort, and then click Refresh:
4. Review the following fields for each quote:
   - Quote Number
   - Item Number
   - Description
   - Quantity
   - Unit of Measure
   - Response Required By
   - Unit Price

- Quantity Discounts
- Line Status
- Action
- Response Status

5. To review item information for a specific quote, click the item number.
6. On Edit Quote Response, click the tab that contains the information that you want to review. When you are finished reviewing the information, click Close.
7. On View Quote Detail Information, to review price breaks, click View in the Quantity Discounts field.
8. On Edit Quantity Discounts, review the following fields, and then click Cancel.
   - Quantity
   - Price
   - Promised Delivery
   - Expiration Date

► To modify and respond to a quote

From the J.D. Edwards Supplier Portal workspace, use one of the following navigations:

In the Search workspace component, enter Quotes by Item No. in the Search field, enter an item number in the adjacent field, and then click Go. This search enables you to locate a specific item number.

In the Search workspace component, enter Quotes in the Advanced Search field, click Go, and then complete the advanced search information.

In the Quote Status Alerts workspace component, click the value in either the Responses Due field or Requests Received field. If the value is zero, the system displays the View Quote Header Information form and indicates that no records are displayed because a value of zero indicates that there are no responses due or no requests received, respectively.

1. On View Quote Detail Information, for each quote, click Respond or Modify in the Action field.

   If the quote is already closed, the Action field does not contain a value.

2. On Edit Quote Response, click the tab that contains the information that you want to review or modify.
3. To enter a quote response without modifying price breaks, complete the following fields and click Submit:
   - New Unit Price
   - New Expiration Date
   - Promised Delivery
   - Response Date

   The system displays a confirmation message.

4. To review price break history before making modifications on Edit Quote Response, click View Quote Price History.

5. On View Quote Price History, review the price history information and click Close.
6. On Edit Quote Response, to modify price break information and enter a quote response, click Edit Quantity Discounts.
7. On Edit Quantity Discounts, complete the following fields:
   - Quantity
   - Price
   - Promised Delivery
   - Expiration Date
8. To delete an existing price break, choose Delete Row and click Delete.

   The system displays a confirmation message.

Processing Options for Self-Service Quote Response Entry (P4334SS)

Defaults

These processing options specify the default values that the system uses for searching and sorting quote information.

1. Refine Search Quote Display (Required)

Use this processing option to specify the default search criteria for the Refine Quote Search option.

01 Search All quotes

02 Search Open quotes only

03 Search Closed quotes only

04 Search quotes that have not been responded to

2. Refine Sort Quote Display (Required)

Use this processing option to specify the default sort criteria for the Refine Quote Sort option. Quotes displayed in the grid will be sorted using this value.

01 Sort by Quantity

02 Sort by Response Required Date

03 Sort by Quote Entered Date

04 Sort by Responded Date

05 Sort by Quote Number

3. Refine Sort Quote Price History Display (Required)

Use this processing option to specify the sort option for the quote price history display.

01 Sort by Quantity

02 Sort by Quoted Price

03 Sort by Promised Delivery Date

04 Sort by Expiration Date

Display

These processing options specify codes that the system uses for displaying quote information.

1. Supplier Item Cross-Reference Type code (Optional)

Use this processing option to specify the cross-reference type for item between the supplier and the enterpeise.

2. Date type for Advanced Search query (Required)

Use this processing option to deault the radio button for the dates in the Advanced Search form.

1. Response Required Date

2. Quote Entered Date

3. Responded Date

3. Closed Status Code (Required)

Use this processing option to specify the closed status code for the quotes.

4. Type Code (Required)

Use this processing option to specify the address type code.

Process

These processing options specify default processing information.

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1. Order Type (Required)

Use this processing option to specify the document type for the quotes.

2. Default Number of Days (Required)

Use this processing option to calculate the "From" date from today's date for Advanced Search query. The number of days specified will be subtracted from today's date and the "From" date will defaulted for the selected date.

3. Maximum Records to Query (Required)

Use this processing option to limit the number of records to query for a given search criteria.

Displaying and Managing Purchase Order Information

Suppliers can use self-service to review purchase order information, such as purchase orders that have been entered, open purchase orders, receipts, dispositions, closed purchase orders.

Suppliers can also use self-service to maintain purchase order information that is entered through the customer's Procurement system. When a customer shares purchase order information with suppliers, the customer can rely on the supplier to help arrange resources for filling the purchase order. The supplier then modifies the purchase order to include resource information and notifies the customer of the modifications. Next, the customer can accept or reject the modifications.

By setting processing options for the Self-Service – Purchase Order Edit program (P4311S), the customer controls the types of modifications that a supplier can make to a purchase order. Modifications might include:

- Updates to the quantity that the buyer has ordered
- Updates to the promised date
- Updates to price information

► To review purchase order information

From the J.D. Edwards Supplier Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose Manage Orders and complete the advanced search information.

In the Search workspace component, enter Orders by Item No. in the Search field, enter an item number in the adjacent field, and then click Go. This navigation enables provides you with detail information only (no header information).

In the Search workspace component, enter Orders by Sales Order No. in the Search field, enter an order number in the adjacent field, and then click Go. This navigation provides you with header information before detail information; the other navigations for this application provide only detail information.

In the Search workspace component, enter Orders in the Advanced Search field, click Go, and complete the advanced search information.

In the Supplier Order Status Alerts workspace component, click the value for Held Orders, Orders to be Delivered, or Open Items.

1. If you have chosen to review orders by sales order number, the View Order Header form appears. If you are not reviewing orders by sales order number, proceed to step 4.
2. On View Order Header, refine the information for which the system searches by choosing the appropriate options by which to view and sort, and then click Refresh.
3. Review the following fields for each purchase order number:
    - Customer PO Number
    - Order Date
    - Request Date
    - Promised Date
    - Order Amount
    - Order Status
    - Notify in Transit
4. To review detailed purchase order information, click the purchase order number.
5. Review the following fields:
    - Customer PO Number
    - Line Item
    - Item Number
    - Ordered Quantity
    - Quantity Received
    - Order Status
    - Action
6. To review detailed information for an item, click the line item number.
7. On View Item Detail, click the tab that contains the information that you want to review and click Close.
8. On View Order Detail, to review an item's receipt status, click the value in the Customer PO Number field, and then click the value in the Quantity Received field.
9. On View Receipt Lines, review the receipt detail information.

    If there is disposition information, the Disposition Quantity field contains a value.
10. To review disposition information, click the value in the Disposition Quantity field.
11. On View Disposition Information, review the reasons that an item was returned and click Close.
12. On View Receipt Lines, click Close.
13. On View Order Detail, click Close.

► To modify purchase order information

From the J.D. Edwards Supplier Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose Manage Orders and complete the advanced search information.

In the Search workspace component, enter Orders by Item No. in the Search field, enter an item number in the adjacent field, and then click Go. This navigation enables provides you with detail information only (no header information).

In the Search workspace component, enter Orders by Sales Order No. in the Search field, enter an order number in the adjacent field, and then click Go. This navigation provides you with header information before detail information.

In the Search workspace components, enter Orders in the Advanced Search field, click Go, and complete the advanced search information.

In the Supplier Order Status Alerts workspace component, click the value for Held Orders, Orders to be Delivered, or Open Items.

1. On View Order Header (which appears only if you have chosen to review orders by sales order number), click Refresh, and then click the purchase order number.
2. On View Order Detail, click Edit in the Action field for the line item that you want to modify.
3. On Edit Line Item, complete the following fields and click Submit:
   - Unit Price
   - Sales Order No.
   - Promised Delivery

   You can modify the extended price only if the line is a journal entry line, and you can modify only the unit price or the extended price (not both). When you are finished, the system displays a confirmation message.
4. On View Order Detail, click Close.

► To cancel a purchase order detail line

From the J.D. Edwards Supplier Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose Manage Orders and complete the advanced search information.

In the Supplier Order Status Alerts workspace component, click the value for Open Items.

1. On View Order Detail, click Edit in the Action field for the line item that you want to cancel.
2. On Edit Line Item, click Close Line.

   The system prompts you to confirm that you want to close the line.
3. On Edit Line Item, continue canceling purchase order detail lines. When you are finished, click Cancel.
4. On View Order Detail, click Close.

Processing Options for Self-Service — Purchase Order Edits (P4311S)

Display
1. Quantity

Blank = Display
1 = Edit

2. Price

Blank = Display
1 = Edit
3. Supplier Order Number

Blank = Display
1 = Edit
4. Promised Delivery

Blank = Display
1= Edit
Change Notification
1. Buyer

Blank = Do not notify the Buyer
1= Notify the Buyer
2. Planner

Blank = Do not notify the Planner
1 = Notify the Planner
Versions
1. Purchase Order Entry
2. Track Shipments

Notifying Customers of Orders in Transit

After a supplier uses the Manage Purchase Orders application to maintain a customer's (buyer's) purchase order information, the supplier might also initiate shipment notification to let the customer know that the shipment is in transit.

To notify customers of orders in transit, complete the following tasks:

- Either advance the next status on the purchase order or initiate receipt routing.
- Activate the processing options in the Self-Service – Purchase Order Receipts program (P4312S) for buyer notification and planner notification.

When notifying customers of orders in transit, the system sends electronic confirmation messages to the following users:

- The customer who is associated with the purchase order detail line
- The planner for the item

Both electronic confirmation messages contain links to an application that displays purchase order detail lines for which the supplier notified the customer that a shipment is in transit.

► To notify customers of orders in transit by shipment destination

From the J.D. Edwards Supplier Portal workspace, in the Tasks workspace component, click Notify Order in Transit.

1. On Notify Order Detail in Transit, perform one of the following:
   - To search for the information that the system displays by specific shipment destinations, click Destination.
   - To search for all purchase order detail lines that are eligible for shipment notification, click Refresh and proceed to step 5.
2. On Search for Destination, to select a destination by which the system filters information, click a value in the Name column.
3. On Notify Order Detail in Transit, click Refresh.
4. On View Order Header, click Notify for the purchase order number that is in transit.
5. On Notify Order Detail in Transit, complete the following field for each line number:
   - Quantity Shipped
6. To cancel the shipment of items that remain on the purchase order, choose the Cancel Remaining option for the line number.
7. To save the quantity information and cancellations, click Submit.

   The system provides an electronic confirmation message that indicates that it has accepted the changes.

► To notify customers of orders in transit by purchase order

From the J.D. Edwards Supplier Portal workspace, in the Supplier Order Status Alerts workspace component, click the value for Orders to be Delivered.

1. On View Order Header, refine the information that the system searches for by choosing the appropriate view and sort options. When you are finished, click Refresh.
2. Click Notify for the purchase order number that is in transit.
3. On Notify Order Detail in Transit, complete the following field for each line number:
   - Quantity Shipped
4. To cancel the shipment of items that remain on the purchase order detail line, choose the Cancel Remaining option for the line number.
5. To save the quantity information and cancellations, click Submit.

   The system provides an electronic confirmation message that indicates that it has accepted the changes.

Processing Options for Self-Service Purchase Order Receipts (P4312S)

Display
1. Nota Fiscal Document Type

Blank = "NF"

Processing
1. Advance Status Only

Blank = No
1 = Yes
2. Next Status for Advance Status Only
3. Cancel Remaining

Blank = Display
1 = Do not display
4. Supplier Item X-Reference
5. Purchasing Order Types
Change Notification
1. Buyer

Blank = Do not notify the Buyer
1 = Notify the Buyer
2. Planner

Blank = Do not notify the Planner
1 = Notify the Planner
Versions
1. Receipts (P4312)
If left blank, ZJDE0001 will be used.
2. Transaction Log (P43001SS)
If left blank, ZJDE0001 will be used.

Displaying Supplier Inventory Information

Both suppliers and customers can use self-service to review a variety of inventory information, such as general item information, item quantities, and reorder points. A supplier might want to check inventory to determine when an item needs to be reordered and to review items for which the quantity is lower than safety stock. Processing options for the Self-Service – Inventory Information Inquiry program (P41204) indicate whether the user is a supplier or customer.

Before You Begin

- ❑ An administrator within the enterprise sets the appropriate processing options in the Self-Service - Inventory Information Inquiry program (P41204) to control information such as whether the system displays summary or detail information and whether the user is a supplier or customer.
- ❑ An administrator within the enterprise completes the appropriate processing option in the Self-Service - Inventory Information Inquiry program (P41204) with the cross-reference type from the Item Cross-Reference table (F4104) that the system uses when searching for inventory information.

► To display inventory information for suppliers

From the J.D. Edwards Supplier Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose either View Items Out-of-Stock or View Items Below Safety Stock.

In the Search workspace component, enter Inventory in the Advanced Search field, click Go and complete the advanced search information.

1. On View Inventory Information, choose a view option, choose whether you want the system to display summary or detail information, and then click Refresh.

   The summary mode shows quantities summarized by item level. The detail mode shows quantities at both the item and branch level. You can view only the items that have been assigned to you through the Supplier Number field on the Item/Branch Plant Info. form of the Item Branch program (P41026).

2. Review the following fields:
   - Item Number
   - Item Description
   - Unit of Measure
   - Quantity Available
   - Quantity on Receipt
   - Safety Stock

   If the Quantity Available field is highlighted in red, an inventory shortage exists.

3. In the Additional Information field, which appears only when you have chosen for the system to display detail information, click View.
4. On View Inventory Detail, review inventory and reorder information and click Close.
5. On View Inventory Information, click Close.

Processing Options for Self-Service Inventory Information Inquiry (P41204)

Defaults Tab

These processing options specify the types of information that the system displays.

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1. Display Option

Blank = In Summary Mode

0 = In Summary Mode

1 = In Detail Mode

Use this processing option to specify whether the system displays records in summary or detail mode. Valid values are:

Blank

The system displays records in summary mode and quantities at the item level.

1

The system displays records in summary mode and quantities at the item level.

2

The system displays records in detail mode and quantities at the item/branch level

2. Supplier View Option

Use this processing option to specify which item information the system displays for the supplier. Valid values are:

01

The system displays all items.

02

The system displays only those items for which the on-hand quantity is equal to or less than zero.

03

The system displays only those items for which the on-hand quantity is below the safety stock level

3. Customer View Option

Use this processing option to specify which item information the system displays for the customer. Valid values are:

01

The system displays all items.

02

The system displays only those items for which available quantity is greater than zero

Process Tab

These processing options specify the supplier and customer information that the system processes.

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1. Supplier Cross-Reference Type

Use this processing option to indicate the UDC (41/DT) by which the system searches cross-reference information that is associated with a supplier item number. Cross-references associate your internal item numbers with the supplier's item numbers. The system stores item information in the Item Master table (F4101), and you can create the cross-reference information in the Item Cross-Reference program (P4104). If you leave this processing option blank, the system does not display and process any cross-reference information.

2. Customer Cross-Reference Type

Use this processing option to indicate the UDC (41/DT) by which the system searches cross-reference information that is associated with a customer item number. Cross-references associate your internal item numbers with the customer's item numbers. The system stores item information in the Item Master table (F4101), and you can create the cross-reference information in the Item Cross-Reference program (P4104). If you leave this processing option blank, the system does not display and process any cross-reference information.

3. Supplier Search Type

Use this processing option to specify the search type for the supplier. Click the Search button to view a list of valid search types. If you leave this processing option blank, the system uses a search type of V (vendor).

4. Customer Search Type

Use this processing option to specify the search type for the customer. Click the Search button to view a list of valid search types. If you leave this processing option blank, the system uses a search type of C (customer)

Displaying and Responding to Supplier Release Schedules

Suppliers can use self-service to review planned and released supplier schedules. The schedule provides suppliers with advance notice of requirements and helps suppliers to forecast customer (also known as buyer or planner) needs for the future. Suppliers can inquire about a particular item or blanket order that is associated with a supplier schedule. The customer can allow the supplier to change delivery dates and quantities on the supplier schedule, provided that the enterprise has set the appropriate processing option in the Supplier Schedule Revisions program (P34301) to allow the supplier to make changes. After the supplier submits changes to the supplier schedule, the system automatically notifies the customer of the changes that the supplier has made.

► To review the supplier release schedule

From the J.D. Edwards Supplier Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose Manage Release Schedules.

In the Search workspace component, enter Schedules by Blanket No. in the Search field, enter a blanket order number in the adjacent field, and then click Go.

In the Search workspace component, enter Schedules in the Advanced Search field, click Go and complete the advanced search information.

1. On View Blankets with Release Schedule, review the following fields:
   - Item Number
   - Order Number
   - Line Number
   - Start Date
   - Planned Quantity
   - Released Quantity
   - Schedule
2. To review the release schedule, click View in the Schedule field.
3. On View Release Schedule, review the information on both the Order Information and Receipt Information tabs, and then click Close.
4. On View Blankets with Release Schedule, click Close.

► To modify the supplier release schedule

From the J.D. Edwards Supplier Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose Manage Release Schedules.

In the Search workspace component, enter Schedules by Blanket No. in the Search field, enter a blanket order number in the adjacent field, and then click Go.

In the Search workspace component, enter Schedules in the Advanced Search field, click Go and complete the advanced search information.

1. On View Blankets with Release Schedule, click Edit in the Schedule field.
2. On Edit Release Schedule, modify the quantity information in the detail area and click Submit.

Note

A key at the bottom of the form explains the meaning of letters that appear next to some of the date fields.

The system notifies the planner of the modifications by sending a message to the planner's work center.

3. On View Blankets with Release Schedule, click Close.

Processing Options for Supplier Schedule Revisions (P34301)

Versions
Enter the version for each program. If left blank, version ZJDE0001 will be used for 1 through 7.
1. Open Order Inquiry (P4310)
2. Supply/Demand Inquiry (P4021)
3. Purchase Order Entry (P4310)
4. Vendor/Blanket Information (P4321)
5. Pegging Information (P3412)
6. Supplier Schedule Release Generation (R34410)
7. Item Branch (P41026B)
8. Enter the version of Supply/Demand Inclusion Rules to use for active Blanket Order selection
9. Purchase Order Inquiry Self Service (P4310SS)

Defaults
1. Enter the Document Type to filter on the form
Document Order Type
2. Supplier Self Service Functionality
blank = Bypass Supplier
1 = Activate Supplier Self Service functionality for use in JAVA/HTML

3. Enter Cross Reference Type for Supplier Item Number (used only in web mode)
Item Cross-Reference Type Code
4. Allow changes to the schedule
blank = Allow changes to the schedule
1 = Do not allow changes to the schedule

Status Update
1. Enter Status for Vendor Schedule Update
Vendor Schedule Status
2. Enter status beyond which changes cannot be made to the Vendor Schedule. If left blank, the schedule will always be open to change.
To Status

Reviewing Accounts Payable Information

Suppliers can use self-service to review the customer account information that is entered through in the supplier's Accounts Payable system. This information includes open amounts for invoices, the payment status, and payment history information.

► To review accounts payable information

From the J.D. Edwards Supplier Portal workspace, use one of the following navigations:

In the Tasks workspace component, choose View Account Information.

In the Search workspace component, enter Accounts by Invoice No. in the Search field, enter an invoice number in the adjacent field, and then click Go. This search enables you to locate a specific quote number.

In the Search workspace component, choose Account Information in the Advanced Search field, click Go, and complete the advanced search information.

1. On View Payment Information, refine the information that the system searches for by choosing the appropriate view and sort options. When you are finished, click Refresh.
2. On View Payment Information, review the following fields:
   - Invoice Number
   - Pay Itm
   - Due Date
   - Open Amount
   - Invoice Amount
   - Invoice Date
   - Customer PO Number
   - Payment Status
   - Currency
3. To review detail information for an invoice, click the appropriate invoice number in the detail area.
4. On View Payment Information Detail, choose either the Invoice Details tab or Amounts/Dates tab.
5. To review all payment history for a particular voucher, click View Payment History.
6. On View Payment History, review the payment and discount information, and then click Close.
7. On View Payment Information Detail, click Close.

You can perform the following additional tasks on the View Payment Information form:

- You can access the Manage Purchase Order application by clicking the buyer order number.
- You can review payment history information by clicking the payment status.

8. When you are finished reviewing the payment information, click Close.

Processing Options for Self-Service – Supplier Payment Inquiry (P04111)

Default
1. Default Filter Option
2. Default Sort Option
3. Purchase Order Inquiry Self-Service Application Version

Displaying Supplier Performance

Customers can use self-service to publish their ratings of suppliers based on KPIs (Key Performance Indicators) for the following categories:

- Item cost
- Item quality
- Order delivery

The enterprise (the company that uses J.D. Edwards software) defines the KPIs by using the Inquiry Columns program (P51COL) and Inquiry Formats Window program (P51FMT) in OneWorld.

The system displays the suppliers' ratings for only the items that they supply in the form of percentages, which indicate a supplier's performance compared to the customer's expectations. A supplier can personalize supplier performance information by defining rating ranges for the KPIs that the enterprise has defined, and then use the information to measure and improve performance.

Before You Begin

- ❑ The enterprise must define the KPIs (Key Performance Indicators) by using the Inquiry Columns program (P51COL),which stores the KPIs in the Inquiry Columns (F5192) table.
- ❑ The enterprise must define the inquiry formats for the supplier analysis by using the Inquiry Formats Window program (P51FMT), which stores the formats in the Inquiry Formats (F5193) table.
- ❑ The enterprise must activate the appropriate processing option in the Self-Service Supplier Analysis Summary program (P43230SA) for the system to display performance analysis information as a quality analysis, delivery analysis, or cost analysis.
- ❑ The enterprise must specify the format names for the various types of analyses using the appropriate processing options in the Self-Service Supplier Analysis Summary program (P43230SA).
- ❑ In the Self-Service Supplier Analysis Summary program (P43230SA), the enterprise can set a processing option that displays colors for good and bad performance ratings. The enterprise can also complete the appropriate processing options with ranges of values that determine good and bad performance ratings.

See Also

- ❑ *Reviewing a Summary of Supplier Performance Information* in the *Procurement Guide*

- *Order Entry* in the *Procurement Guide*
- *Receipt Processing* in the *Procurement Guide*
- *Voucher Processing* in the *Procurement Guide*
- *Supplier Management* in the *Procurement Guide*

► To define ranges for good and bad ratings

From the J.D. Edwards Supplier Portal workspace, click the Personalize icon in the Supplier Performance Analysis workspace component.

1. On Supplier Performance Analysis, review the Quality Analysis, Delivery Analysis, and Cost Analysis sections to see which KPI categories and which KPIs have been defined by the enterprise.

   If the enterprise has defined one or more KPIs within a KPI category, then the KPI category option is turned on. You can turn on and turn off the KPIs in a KPI category depending on whether you want to specify ranges that the system uses to check your performance.

2. To specify a range that the system uses to rate your performance, turn on the option for the KPI, and then complete the following fields for both the Good Performance and Bad Performance sections:
   - From
   - To
3. To prevent the system from rating your performance, turn off the appropriate KPI category option.

   You can restore the KPI settings that the enterprise originally defined by clicking Restore Defaults.

4. When you are finished choosing the KPIs on which you will be rated and specifying ranges for good and bad performance, click Save.

   The system saves the information for future sessions.

► To review quality analysis information

From the J.D. Edwards Supplier Portal workspace, in the Supplier Analysis workspace component, enter an item number in the Item Number (optional) field, and then click Go.

1. On View Supplier Performance Analysis, choose Quality Analysis in the View field, and then click Refresh.
2. For each item that you supply, review the user defined fields. Numbers that appear in bold, green type indicate a good rating.
3. To review monthly analysis information for an item and branch combination, choose View in the Monthly Analysis field.
4. On View Monthly Performance Analysis, modify the dates for the analysis by completing the following fields, and then click Refresh:
   - From
   - Thru
5. Review the user defined fields for each month and year combination. Numbers that appear in bold, green type indicate a good rating.

6. To review monthly detailed analysis information, choose View in the Detail Analysis field.
7. On View Monthly Performance Detail, review the information, and then click Close.
8. On View Monthly Performance Analysis, click Close.

► To review delivery analysis information

From the J.D. Edwards Supplier Portal workspace, in the Supplier Performance Analysis workspace component, enter an item number in the Item Number (optional) field, and then click Go.

1. On View Supplier Performance Analysis, choose Delivery Analysis in the View field, and then click Refresh.
2. For each item that you supply, review the user defined fields. Numbers that appear in bold, green type indicate a good rating.
3. To review monthly analysis information for an item and branch combination, choose View in the Monthly Analysis field.
4. On View Monthly Performance Analysis, modify the dates for the analysis by completing the following fields, and then click Refresh:
    - From
    - Thru
5. Review the user defined fields for each month and year combination. Numbers that appear in bold, green type indicate a good rating.
6. To review monthly detailed analysis information, choose View in the Detail Analysis field.
7. On View Monthly Performance Detail, review the information, and then click Close.
8. On View Monthly Performance Analysis, click Close.

► To review cost analysis information

From the J.D. Edwards Supplier Portal workspace, enter an item number in the Item Number (optional) field, and then click Go.

1. On View Supplier Performance Analysis, choose Cost Analysis in the View field, and then click Refresh.
2. For each item that you supply, review the user defined fields. Numbers that appear in bold, green type indicate a good rating.
3. To review monthly analysis information for an item and branch combination, choose View in the Monthly Analysis field.
4. On View Monthly Performance Analysis, modify the dates for the analysis by completing the following fields, and then click Refresh:
    - From
    - Thru
5. Review the user defined fields for each month and year combination. Numbers that appear in bold, green type indicate a good rating.

6. To review monthly detailed analysis information, choose View in the Detail Analysis field.
7. On View Monthly Performance Detail, review the information and then click Close.
8. On View Monthly Performance Analysis, click Close.

Managing Supplier Information

Suppliers can use self-service to review and modify address book information, including mailing name, address, telephone number, e-mail address, and web contacts.

A supplier can also review additional information about the supplier master information that is contained in the enterprise system. However, this information is display-only.

By reviewing and modifying address book information, the supplier can resolve discrepancies within the enterprise system. Reviewing supplier master information enables the supplier to identify discrepancies and communicate them to the enterprise.

► To modify supplier name and address information

From the J.D. Edwards Supplier Portal workspace, in the Tasks workspace component, choose Manage Supplier Information.

1. On View User Information, review the User Name, Corporate Address, and Corporate Contact Information sections.
2. To modify user name information, click Edit in the User Name section.
3. On Edit User Name, complete the following fields, and then click Submit:
   - Primary Mailing Name
   - Secondary Mailing Name

   The system saves the information.
4. On View User Information, to modify address information, click Edit in the Corporate Address section.
5. On Edit User Address, complete the following fields, and then click Submit:
   - Address Line 1
   - Address Line 2
   - Address Line 3
   - Address Line 4
   - City
   - State
   - Postal Code
   - County
   - Country

   The system saves the information.

6. On View User Information, click Close.

► **To modify supplier corporate contact information**

From the J.D. Edwards Supplier Portal workspace, in the Tasks workspace component, choose Manage Supplier Information.

1. On View User Information, click Edit in the Corporate Contact Information section.
2. On Edit Corporate Contact Information, complete the following fields:
   - Business Line
   - Facsimile Line
   - Email Address
   - WWW Address
3. To modify secondary telephone and facsimile numbers, click Edit Entire Phone List.
4. On Edit Entire Phone List, complete the following fields:
   - Phone Type Code
   - Prefix
   - Phone Number
5. To delete a telephone or facsimile number, choose Delete Row, and then click Delete.
6. To save the telephone and facsimile modifications, click Submit.
7. On Edit Corporate Contact Information, to modify Internet contacts, click Edit Entire Web Contact List.
8. On Edit Entire Web Contact List, complete the following fields:
   - Address Type Code
   - Electronic Address
9. To delete a web contact, choose Delete Row, and then click Delete.
10. To save the web contact modifications, click Submit.

Processing Options for Self-Service Change Address Book Information (P01012SS)

Types
Business Phone Number Type
Facsimile Phone Number Type
Email Type
URL Type