



Training Guide

Oracle E-Business Suite eProcurement Training – iSupplier Portal for End-Users

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iSupplier Training

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Introduction

Oracle iSupplier

Oracle iSupplier Portal is being deployed at NEORSD to enable district suppliers to efficiently manage interaction and communication with the district for all purchasing activity. The portal provides a secure, Internet-based access point that enables direct and real-time access to purchasing and invoicing activity with NEORSD.

Suppliers access the latest information for their individual accounts, including:

- Purchase Orders
- Shipments and Shipment Notices
- Receipt information
- Delivery information
- Invoice and Payment status

The two-way collaboration enables suppliers to:

- Submit change requests
- Process shipment notices
- Create and submit invoices
- Update profile data

Sourcing Supplier Portal

Registered suppliers will also have access to the Sourcing Supplier portal. This portal also provides a secure, Internet-based access point that enables direct and real-time access for responding to bid invitations and communicating directly with the NEORSD purchasing administration.

The Sourcing Supplier Portal enables suppliers to:

- Receive immediate notification of bid request invitations from NEORSD
- Complete and submit complete bid responses online
- Communicate through messaging directly with NEORSD purchasing administrators for any questions or information requests related to bid invitations and responses



Objectives

During this training course, supplier users will learn how to:

- Access the iSupplier portal and Home Page
- Use the Orders tab and related functions
- Use the Shipments tab and related functions
- Use the Finance tab and related functions
- Create and submit invoices
- Create and submit Advanced Shipment Notices
- Perform profile updates through the Admin tab
- Use the Sourcing responsibility to respond to bid requests and communicate directly with NEORSD purchasing administrators

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Topic 1: iSupplier Portal and Home Page Review

Supplier Access and Account Setup

iSupplier Training

Guide

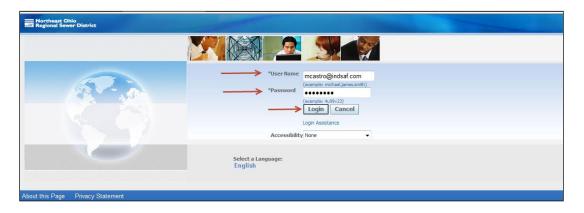
Approved supplier users to will be registered at NEORSD for access to the iSupplier portal.

Registered suppliers will receive valid **UserID** and **Password** login credentials via email from designated NEORSD administrators. The email information will also include the appropriate **link** to the iSupplier login page for access.

This topic covers:

- Navigation to the iSupplier Home Page
- Review of Home Page elements

iSupplier Login



The Login screen is displayed.

- 1- Enter assigned value in the User Name field.
- 2- Enter assigned value in the **Password** field.
- 3- Click the **Login** button.





	🔒 Favorites 🔻
nterprise Search 🛛 🖌	Go Search Results Display Preference
	Logged In A
racle Applications Home Page	
Main Menu	Waddict
Main Menu	Worklist
Main Menu Persona	
Persona	
	lize

The Oracle Applications Home Page is displayed.

4-	Click the Supplier Portal Full	Access	link
----	--------------------------------	--------	------

Northeast Ohio Regional Sewer District	iSupplier Portal				
2				Navigator 🔻	🙀 Favorites 🕶 Ho
ne Orders Shipmer	nts Finance Admin				
Search PO Number		Go			
Notifications					Planning
HOURAUOIIS				Full List	Orders
Subject			Date	Due	Agreements
NAME OF ALL AND A DECEMBER OF A DECEMBER	69-2 (CONTROLLER SINGLE LOOP FISCH	IER DORTER)	02/13/2015 09:46:0	10000	Purchase Orders
	Purchase Order 14003521. 0	IGN POINTENT	10/01/2014 13:55:0	100	<u>Purchase History</u>
The officer of the officer of the	CONTRACTOR CONTRACTOR		10,01,000,0000		Shipments
Orders At A Gla	ince				Delivery Schedules Overdue Receipts Advance Shipment Note
				Full List	Receipts
PO Number	Description	Order Date			<u>Receipts</u>
16002808		06/27/2016 09:3	4:35		<u>Returns</u> On-Time Performance
16002627	BPO 16001958	06/23/2016 15:1	9:34		
16002831		06/23/2016 13:5			Invoices
16002792	BPO 16001958	06/22/2016 10:4			Invoices
16002734		06/18/2016 10:4	3:38		Payments
					<u>Payments</u>
Shipments At A	A Glance				
				Full List	
Views				1	
View ASNs in Last 18	80 Days 💌 Go Personalize				
	Packing Slip	Shipment	Date		
Shipment Number					

The **iSupplier Portal Home Page** is displayed.



- 5- Note the **Notifications** region of the screen. Notifications from NEORSD purchasing personnel will be received in this section.
- 6- Note the Orders At A Glance region of the screen. This region will always contain the five most recent purchase orders for immediate review, showing PO Number, Description, and Order Date.

Orders At A Glance			
		Full List	
PO Number	Description	Order Date	
→13000334		10/09/2013 08:42:37	
13000332		10/08/2013 20:52:06	
13000326		10/08/2013 14:19:30	
13000290		10/07/2013 12:52:12	
13000289		10/07/2013 12:51:44	

All purchase orders can be reviewed in **detail** from this region of the screen.

7- Click the **link** for the **PO Number** as indicated to drill down to the additional summary information.

Purchase Orders Work	Orders Agreements Pure	hase History Work Confirmations Deliverables RFQ								
Home >	5									
Standard Purchase Order: 1	3000334, 0 (Total USD 200.00)									
Currency=USD							Actions	Request Changes	- 6	io Export
Order Information										
General		Terms and Conditions	\longrightarrow	Summary						
General		Ternis and conditions			200.0	0				
Total	200.00	Payment Terms NET 30 DAYS		Received	0.00					
Supplier	INDUSTRIAL SAFETY PRODUC			Invoiced	0.00					
	INC	FOB DESTINATION		Payment Status	Not Pa	aid				
Supplier Site	01	Freight Terms DELIVERED								
Address	6091 CAREY DR	Shipping Control								
	VALLEY VIEW, OH 44125									
	Shomon, Linda E	Ship-To Address								
	10/09/2013 08:42:37	Address 6000 Canal Rd								
Description		Cuyahoga Heights, OH 44125								
> Status	Open	cuyanoga nagnas, on trizo								
Note to Supplier		Bill-To Address								
Operating Unit	NEORSD LE									
Sourcing Document		Address 3900 Euclid Ave								
Supplier Order Number		Cleveland, OH 44115								
Attachments	None									
PO Details										
Show All Details Hide All De										
Details Line A Type		plier Item Description		UOM	Qty	Price	Amount Status	Attachme	nts	Reason
Show 1 GOODS	5	TEST TO SEE IF WILL GO OVER TO EBS		EA	1	200	200.00 Open			

The Order Information window is displayed.

- 8- Note the **Summary** information for the order.
- 9- Note the additional information shown, including **Buyer** and **Order Status**.

PO Details 🔶										
Show All Details	Hide All Details									
Details Line 🔺	Туре	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount Status	Attachments	Reason
Show 1	GOODS			TEST TO SEE IF WILL GO OVER TO EBS	EA	1	200	200.00 Open		
Return to Home								Actions	Request Changes 👻	Go Export
				Home Orders Shipments Finance Admin Home Logou	t Preferences Help Di	agnostics				

The **PO Details** region of the window shows summary information for each line of the order.

10- Click the **Show** link to view additional shipment details for the order line.



Show All Detail	Is Hide All Details																	
Details Line 🔺	Туре	Item/J	ob	Supplier	Item	Descripti	ion			UOM	Qty	Price	Amount	Status	A	tachm	ents	Reason
Hide 1	GOODS					TEST TO	SEE IF WILL O	SO OVER TO) EBS	EA	1	200	200.00	Open				
				Qty			Amount											
	Ship-To Location		Ordered	Received	Invoiced	Ordered	Received	Invoiced	Promised Date		Need-By Date	F	Payment Status	Status	Supplier Line	Split	Reason	Attachments
5	Southerly Internal Locatio	n i	1			200.00			10/30/2013 00:00:0	0	10/30/2013 00:00:00			Open				

The Shipments detail is shown, including the Ship-To Location, Ordered Quantity, Promised Date, Need-By Date, and Status.

11- Click the **Return to Home** link to return to the main page.

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Topic 2: iSupplier Home Page – Orders Tab

iSupplier portal users will have direct access to summary and detail information related to orders through the **Orders** tab. This tab also provides links to additional information pertaining to orders, including **PO Changes** and **Agreements**.

This topic covers:

- Overview of the Orders tab and summary information
- Review of views related to Purchase Orders
- Access to Purchase Agreements information

Orders Tab – Summary Information

iSupplier Training

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The Home Page is displayed.

1- Click on the **Orders** tab.

1.40	theast Ohio fonal Sewer I		iSupplier			🕺 Navgator 🕶 🔒	Favorites -	Home Logs	xt Preferer	nces Help
ome	Orders	Shipmen	ts Finance	Admin						
Purcha	se Orders	Agree	ments We	w Requests Purd	iase History					
Purcha	se Orders									
									Mult	tiple PO Change
Views										
	-			- 39 - 72						
View	All Purch	ise Order:	s	• Go				-	Ad	vanced Search
									1	
Select	Order: A	cknowle	dge Requ	est Cancellation	Request Changes View Change History			i Pr	evious 1-2	5 • Next 25 9
Select	PO Numbe	Rev	Supplier	Document Type	Description	Order Date	Buyer	Amount	Status	Attachments
0	16002482	2	REXEL, INC	Standard PO		06/27/2016 09:45:17	Shomon, Linda E	0.00	Closed	
.0	16002808	1	REXEL, INC	Standard PO		06/27/2016 09:34:35	Struhar, Donna L	7,640.28	Open	
0	16002627	1	REVEL, INC	Standard PO	8PO 16001958	06/23/2016 15:19:34	Shomon, Linda E	89.40	Open	
.0	16002831	0	REXEL, INC	Standard PO		06/23/2016 13:51:55	Struhar, Dorma L	2,093.00	Open	
0	16002792	2	REVEL, INC	Standard PO	8PO 16001958	06/22/2016 10:40:49	Shomon, Linda E	254.04	Open	
0	16002734	0	REXEL, INC	Standard PO		06/18/2016 10:43:38	Shomon, Linda E	5,078.40	Open	
0	16002727	2	REVEL, INC	Standard PO		06/17/2016 09:39:29	Stuhar, Donna L	490.38	Open	
0	16002509	0	REVEL, INC	Standard PO		06/06/2016 13:28:24	Shomon, Linda E	277.19	Open	
0	16002443	0	REVEL, INC	Standard PO	BPO 16001958	06/02/2016 10:09:51	Shomon, Linda E	80.64	Closed	
0	16002307	1	REVEL, INC	Standard PO		05/31/2016 11:29:52	Gant, Chervi L	16,638.60	Closed	
0	16001937	1	REVEL, INC	Standard PO	Increase purchase order per Brian Pozwick	05/24/2016 17:25:09	Brooks, Antwase	9,654.00	Closed	
0	16002313	0	REVEL, INC.	Standard PO		05/24/2016 10:02:59	Shomon, Unda E	921.83	Closed	
0	16002305	0	REXEL, INC	Standard PO	quote #\$113878590	05/23/2016 18:06:56	Shomon, Linda E	3,878.21	Closed	
0	16002278	0	REXEL, INC	Standard PO		05/23/2016 11:52:47	Shomon, Unde E	8,535.00	Closed	
0	16002261	0	REXEL, INC	Standard PO		05/20/2016 17:58:01	Gant, Cheryl L	7,471.50	Closed	
. 0	16002244	0	REXEL, INC.	Standard PO		05/20/2016 17:57:58	Shomon, Linda E	802.24	Closed	

The **Purchase Orders** window is displayed. This window contains all purchase orders. Note the **links** for drilldown to each **PO Number** listed. The window displays 25 order listings at a time.

- 2- Use the vertical scroll bar to scroll down the list.
- 3- Click on the **Next 25** link to view the additional listings.



a kej	rtheast Ohic gional Sewer	- Constant	aalouppi										
								🏦 Navigator 🔻	Ga Favorit	es 🔻 🛛 🖡	lome Log	jout Pre	ferences Help
ome	Orders	Ship	ments Fin	ance Admin									
ircha	se Orders	I A	greements	View Requests	Purcha	ase History							
ircha	se Orders												
												Multiple	e PO Change
found	_										_		
Views													
View	All Purch	ase C)rders		Go						1	Advan	ced Search
	All Purch Order:			Request Cancella		Request Changes	View Change	History		© Pr	evious 25		eed Search
elect	Order:	\ckno	wledge		ation		View Change	History Order	Date	© Pro		26-50	_
elect	Order:	\ckno	wledge Supplier	Request Cancella	ation		View Change	Order		-		26-50	 Next 25 ②
elect elect	Order: A	\ckno	v Supplier REXEL, INC	Request Cancella	ation		View Change	Order 04/15/	2016 08:56:31	Buyer	Amount	26-50 Status	 Next 25 ②
elect elect	Order: A PO Numbe 16001585 16001529	vckno r Rev 0 0	v Supplier REXEL, INC REXEL, INC	Request Cancella Document Type D Standard PO Standard PO	ation		View Change	04/15/ 04/12/	2016 08:56:31 2016 14:16:22	Buyer Gant, Chervl L Gant, Chervl L	Amount 359.80 84.78	26-50 Status Closed Closed	 Next 25 ②
elect elect	Order: A PO Numbe	\ckno	v Supplier REXEL, INC REXEL, INC	Request Cancella Document Type D Standard PO	ation		View Change	04/15/ 04/12/	2016 08:56:31 2016 14:16:22	Buyer Gant, Chervl L	Amount 359.80 84.78	26-50 Status Closed	 Next 25 ②
elect elect	Order: A PO Numbe 16001585 16001529	vckno r Rev 0 0	REXEL, INC REXEL, INC REXEL, INC	Request Cancella Document Type D Standard PO Standard PO	ation		View Change	04/12/ 04/11/	2016 08:56:31 2016 14:16:22 2016 13:32:48	Buyer Gant, Chervl L Gant, Chervl L	Amount 359.80 84.78 398.84	26-50 Status Closed Closed Closed	 Next 25 ②
elect elect	Order: A PO Numbe 16001585 16001529 16001460 16001447	vckno r Rev 0 0	REXEL, INC REXEL, INC REXEL, INC REXEL, INC REXEL, INC	Request Cancella Document Type D Standard PO Standard PO Standard PO Standard PO	ation		View Change	04/15/ 04/12/ 04/07/ 04/07/	2016 08:56:31 2016 14:16:22 2016 13:32:48 2016 13:34:03	Buyer Gant, Cheryl L Gant, Cheryl L Brooks, Antwane Brooks, Antwane	Amount 359.80 84.78 398.84 3,350.00	26-50 Status Closed Closed Closed Closed	 Next 25 ②
elect © ©	Order: A PO Numbe 16001585 16001529 16001460	vckno r Rev 0 0	REXEL, INC REXEL, INC REXEL, INC REXEL, INC REXEL, INC	Request Cancella Document Type D Standard PO Standard PO Standard PO	ation		E View Change	04/15/ 04/12/ 04/07/ 04/07/	2016 08:56:31 2016 14:16:22 2016 13:32:48 2016 13:34:03	Buyer Gant, Chervl L Gant, Chervl L Brooks, Antwane	Amount 359.80 84.78 398.84 3,350.00	26-50 Status Closed Closed Closed Closed	 Next 25 ②
elect elect	Order: A PO Numbe 16001585 16001529 16001460 16001447	vckno r Rev 0 0	wwedge Supplier REXEL, INC REXEL, INC REXEL, INC REXEL, INC REXEL, INC	Request Cancella Document Type D Standard PO Standard PO Standard PO Standard PO	ation		E View Change	Order 04/15/ 04/12/ 04/12/ 04/11/ 04/07/	2016 08:56:31 2016 14:16:22 2016 13:32:48 2016 13:34:03 2016 09:21:55	Buyer Gant, Cheryl L Gant, Cheryl L Brooks, Antwane Brooks, Antwane Brooks, Antwane	Amount 359.80 84.78 398.84 3,350.00	26-50 Status Closed Closed Closed Closed	 Next 25 ②

The window is refreshed to display the next 25 records.

4- Click on the Previous 25 link to view the previous listings.

No Rej	rtheast Ohio glonal Sewer	DistrictiSup	plier Portal					-
				T 1	Vavigator 🔻 🚱 Favorite	s ∀ F	iome Log	out Preferences Help
Home	Orders	Shipments	Finance Admin					
Purcha	se Orders	Agreement	s View Requests	Purchase History				
Purcha	se Orders							
								Multiple PO Change
Views	2							
View	All Purch	ase Orders		Go	1		[Advanced Search
Select	Order:	Acknowledge	Request Cancellat	ion Request Changes View Change History		٢	Previous	1-25 • Next 25 >
	PO Number	Rev Supplier	Document Type	Description	Order Date -	Buyer	Amount	Status Attachments
0	16002482	2 REXEL, INC	Standard PO		06/27/2016 09:45:17	Shomon, Linda E	0.00	Closed
0	16002808	1 REXEL, INC	Standard PO		06/27/2016 09:34:35	Struhar, Donna L	7,640.28	Open
0	16002627	1 REXEL, INC	Standard PO	BPO 16001958	06/23/2016 15:19:34	Shomon, Linda E	89.40	Open
0	16002831	Q REXEL, INC	Standard PO		06/23/2016 13:51:55	Struhar, Donna L	2,093.00	Open
	16000700	0 DEVEL	Chandred DO	000 16001050	06/00/016 10:40:40	Champa Linda	N0 142C	0000

The order information is listed in sequence by the latest **Order Date**.

5- Click the indicator next to **Order Date** to reverse the sequence.

The order information is now listed in sequence by the earliest **Order Date**.

6- Click the indicator next to **Order Date** again to return to the original sequence.





Utilizing Purchase Order View

Purchase Orders	
	Multiple PO Change Export.
Views	
Vew All Purchase Orders • 6o	Advanced Search

Use the **View** function to narrow the order search.

1- Click the **Advanced Search** button.

Advanced Search		
Specify parameters and values to filt Show table data when all condition Show table data when any condition	ons are met.	isplayed in your results set.
PO Number	is 🔹	13000020
Document Type	is 🔹	
Order Date	is 🔻	•
Buyer	is 👻	
Acknowledgement Status	is 🔻	-
\longrightarrow	Go Clear Ad	d Another Acknowledgement Status 👻 Add

The **Advanced Search** window is displayed. Note the multiple **parameters** available for search.

- 2- Enter a specific value in the **PO Number** field.
- 3- Click the **Go** button to execute the search.

Advanced Search										
										Views
Specify parameters and values to fil	ter the data that is disp	layed in your results set.								
Show table data when all condit	ions are met.									
Show table data when any cond	ition is met.									
PO Number	is • 1	3000020								
Document Type	is 🔹	Q								
Order Date	is 👻									
Buyer	is 🔻									
Acknowledgement	is 🔻	•								
Status										
\mathbf{X}	Go Clear Add A	Another Acknowledgement	Status - Add							
Select Order: Acknowledge	Request Cancellat	ion Request Changes	View Change H	listory						
Select PO Number Rev	Operating Unit	Document Type	Description	Order Date 🔻	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
13000020 0	NEORSD LE	Standard PO		09/06/2013 13:54:07	Demmerle, Jennifer L	USD	10,009.80	Open		

Search results are displayed.

4- Click the **link** under **PO Number** to view additional information for the order.



Standard Purchase Order: 13000020, 0 (Total USD 10,009.80)						<u>\</u>	
Currency=USD					Actions Request Cha		Export
					Request Char Request Can		
Order Information					View Change		
General	Terms and Conditions	Summary			View PDF View Receipt		
Veneral		Total 10,			View Invoices		
Total 10,009.80	Payment Terms NET 30 DAYS	Received 10,			View Paymen View Shipme		
Supplier INDUSTRIAL SAFETY PRODUCTS INC	Carrier	Invoiced 5,0			view Snipme	nus	
Supplier Site 01	FOB DESTINATION Freight Terms DELIVERED	Payment Status Not	сраю				
Address 6091 CAREY DR	Shipping Control						
VALLEY VIEW, OH 44125	11.0						
Buyer Demmerle, Jennifer L	Ship-To Address						
Order Date 09/06/2013 13:54:07	Address 6000 Canal Rd						
Description Status Open	Cuyahoga Heights, OH 44125						
Note to Supplier	Bill-To Address						
Operating Unit NEORSD LE	biir to Address						
Sourcing Document	Address 3900 Euclid Ave						
Supplier Order Number	Cleveland, OH 44115						
Attachments None							
PO Details							
Show All Details Hide All Details							
Details Line A Type Item/Job Supplier Item Descrip			UOM	Qty Pric		Attachments	Reason
<u>Show</u> 1 GOODS 014455 BALLAST	T HIGH PRESSURE SODIUM FOR 150 WATT LAMPS 277 VOLT ADVANCE #71A81720	001D	EA	10 1000.9	8 10,009.80 Open		

The **Order Information** window is displayed. Note the **Actions** box with multiple options for viewing additional information related to the order.

- 5- Select the View Change History value.
- 6- Click the **Go** button.

Orders: Purchase Orders > View Order Details >									
Change History for Order									
Currency=USD									-> Ok
 ➡ Indicates new values — Indicates cancellation 									
Supplier Details Request Date Line Shipment Item Item	Price / Description Oty UOM Rate	Promised Amount Date		Start End Date Date	Supplier Order Number	Supplier Order Line Number	Additional Changes	Cancellation Split Request	Response
No results found.	Description Qty oom Kate	Amount bate	Date	ate Date	number	number	Changes	Spirt Request	Response
Return to View Order Details								1 1	Ok
		Orders Shipments F	inance Admin Ho	ome Logout Prefe	erences Diagnostics				
About this Page Privacy Statement								Copyright (c) 2006, Oracle.	All rights reserved.

All **Change Order** history is displayed for the order.

7- Click the **Ok** button to close the window.

Standard Purchase Order: 13000020, 0 (Total USD 10,009.80)							
Currency=USD				Actions	Request Changes -	Go	Export
					Request Changes		
Order Information					Request Cancellation		
				\rightarrow	View Change History View PDF		
General	Terms and Conditions	Summary			View Receipts		
			10,009.80		View Invoices		
Total 10,009.80	Payment Terms NET 30 DAYS	Received	10,009.80		View Payments		
Supplier INDUSTRIAL SAFETY PRODUCTS	Carrier	Invoiced	5,003.92		View Shipments		
INC	FOB DESTINATION	Payment Status	Not Paid				
Supplier Site 01	Freight Terms DELIVERED						
Address 6091 CAREY DR	Shipping Control						
VALLEY VIEW, OH 44125	Chin To Addungs						

Returning to the **Actions** box:

- 8- Select the **View PDF** value.
- 9- Click the **Go** button.





The **File Download** window is displayed.

10- Click the **Open** button.

Nort	heast Ohional Sewe	0 r District					
- Regi	onal Sewel	District	s	tandard Purch	ase Order 16	002627, 1	
NEORSD LI 3900 Euclid Av Cleveland, OH	e			Type Order Revision	16002627	urchase Orde	r
(216) 881- 6600				Order Date Revision Date Buyer	23-JUN-20 Shomon, L	ló inda	
Supplier:	REXEL, INC			Buyer Emai PO Description			
di in The	30310 EMERAL SOLON, OH 441	.D VALLEY PKWY 139					
	See below 3900 Euclid Ave Cleveland, OH						
Confirming Order:	Supplier No.	Payment Terms	Freight Terms	FOB		State Contract	Ship Via
No	01854	NET 30 DAYS	PREPAID & A	DD DEST	INATION		
Supplier Contact: Note to Supplier	<u>:</u>		I				
	er / Description	Contract - Line	Quantity	UOM	Unit Price (U	SD)	Amount (USD)
1 017772 BATTER	Y, RECHARGEA	16001958 - 9 BLE 12V 5 Ah SLA, F	6 POWERSONIC PS-12	EA 250 FI	14.90	000	\$89.40
Need By Requesto Supplier	r: Kovalch	-2016 uk, Nazariy	Ship	4747 1	C Internal Loca East 49th St loga Heights, C		
					То	tal:	\$89.40 (USD)
Please reference th	e above Purchase Ord	ler Number on all Invoices					
It is hereby certified contract, agreement, the above, has been directed for such put	that the amount request obligation, payment or lawfully appropriated or pose and is in the Trea a free from any obligation	sted to meet the r expenditure, for or authorized or usury or in the	Authorized :	Signature:	DemB	n Der	nele
					Chief Fi	nance Officer,	
Propi	rietary and Confidentia	1				1 of 3	2

A **PDF** copy of the order is displayed. Use this copy for printing or save to desktop.

11- Use the **File>Exit** command to exit from the PDF document.



Viewing Order Agreements

Supplier purchase agreements with NEORSD can be viewed in detail through the **link** under the **Orders** tab.

Regional Sever District Supplier Portal	And I Have been a second as	
Home Orders Shipments Finance Admin	🙃 Navigator 🔻 😭 Favorites 🛩	Home Logout Preferences Help
Purchase Orders Agreements View Requests Purchase History Purchase Orders		
		Multiple PO Change

1- Click the **Agreements** link.

		📅 Navigator 🔻 🔒
Home Orders Shipments Fi	nance Admin	
Purchase Orders Agreements	View Requests Purchase History	
Supplier Agreements		
Simple Search		
Note that the search is case insensiti	ve	
	Ve	
Note that the search is case insensiti	ve	
Note that the search is case insensiti PO Number		
Note that the search is case insensiti PO Number Global		

The **Supplier Agreements** window is displayed. Use this window to search for agreements using multiple criteria.

2- To search for **all** Agreements, click the **Go** button.

Supplier	Agreeme	nts													
															Export
Simple	Search														
															10
Note that	he search	is case	e insensitive											Advanced	1 Search
			PO Number												
			Global	-											
			Effective-From Date												
			Effective-To Date												
				Go Clear											
PO Number	Revisio	n Globa	al Description			Buyer	Order Date 🔻	Currency		Amount Released	Effective-From Date	Effective-To Date	Status A	ttachments	Upload Status
13000212			sfvsv			Demmerle,	09/30/2013 16:48:37		1,000.00	Herede 22			Open	coordination	otatat
	/	/				Jennifer L									
13000195	2	0 Yes	vlsd;kvllsdlv			Demmerle, Jennifer L	09/27/2013 10:13:02	2 USD	10,000.00				Open		
<u>13000197</u>	s 2	0 Yes	sdvsdv			Demmerle, Jennifer L	09/26/2013 16:38:44	4 USD		100.00			Open		
13000029	2	0 Yes	test			Demmerle, Jennifer L	09/09/2013 13:15:23	3 USD	10,000.00	201.96	09/09/2013		Open		
<u>13013</u>	2	0 Yes		INDUSTRIAL GLOVES TWO-YE AVE BEEN EXHAUSTED NO QUOT		<u>Shomon, Linda</u> <u>E</u>	09/04/2013 16:28:01	LUSD	24,579.58		03/06/2013	03/08/2015	Open		

The search results are displayed.

3- To view a specific Agreement, click the **link** under the **PO Number** column.



and the second se	hipments Finance Admin Agreements View Requests	Purchase Hist	ory	📅 Navigator 👻 🤮 Fi	avontes 🔻 Hon	ne Logout Pr
Orders: Agreements >	>					
Global Blanket Agree	ment: 16001958 Revision: 1 (Tota					
		1 One year require for all district lo	ement contract for batteries cations	Supplier	05/06/2016 12:02:54 REXEL, INC Shomon, Linda E 11,800.00	
Releases	Currency Amount Released Global Effective End Date	4,893.48 Yes		Status Effective Start Date	05/06/2016	
Releases PO Number	Amount Released Global	4,893.48 Yes	Order Date		05/06/2016 Amount	Recei
	Amount Released Global Effective End Date	4,893.48 Yes 05/06/2017	Order Date 05/11/2016 11:47:26	Effective Start Date		Recei
PO Number	Amount Released Global Effective End Date	4,893.48 Yes 05/06/2017 Status	and the second sec	Effective Start Date Currency	Amount	
PO Number 16002039	Amount Released Global Effective End Date	4,893.48 Yes 05/06/2017 Status Approved	05/11/2016 11:47:26	Effective Start Date Currency USD	Amount 4,469.40	

Detail information for the Agreement is displayed, including all **Releases** associated with the Agreement.

4- Click the Return to Orders, Agreements link.

Northeast Ohio Regional Sewer District Supplier Portal	
K	📅 Navigator
Home Orders Shipments Finance Admin	
Purchase Orders Agreements View Requests Purchase History	
Supplier Agreements	
Simple Search	

The **Supplier Agreements** window is displayed.

5- Click the **Home** tab to return to the main portal page.



Topic 3: iSupplier Home Page – Shipments Tab

iSupplier portal users will have direct access to multiple levels of shipment information through the **Shipments** tab. This tab also provides links to additional information pertaining to shipments, including **Receipts, Returns,** and **Performance**.

This topic covers:

- Overview of the Shipments tab and summary information
- Review of Shipment Receipts details
- Review of Shipment Returns details
- Review of Overdue Receipts details
- Review of On-Time Performance metrics

Shipments Tab – Summary Information

	rtheast Ohi gional Sewe	PDistrict IS	upplier P	ortal				
Home	Orders	Shipments	Finance	Admin				
Se	arch PO	Number	•		Go			

The Home Page is displayed.

1- Click on the **Shipments** tab.

Northeast Ohio Regional Sewer District	iSupplier Portal				
Home Orders Shipme Delivery Schedules		ent Schedules	Receipts Retu	rns Overdue Receipts	On-Time Performance
Simple Search					
Organization PO Number		<u> </u>	Item Number Ship-To Location		3 Q
Supplier Item		Q	Promised Date Need-By Date	(example: 10/19/2013)	
	Go Clear]		(example: 10/19/2013)	

The **Delivery Schedules** window is the default window displayed under this tab. Use this window to search for delivery schedule information using multiple criteria.

2- To search for **all** delivery schedules, click the **Go** button.



Home Ord	ers Shipr	ments Fi	nance Admin											
Delivery Sch	edules	Shipment	Notices Shipment Schedules Receipts	Returns (Overdue Rece	eipts On-Time	Performance							
Delivery Sch	edules													
														Export
Simple Sea	rch													
													A	dvanced Search
	rganization		Item Num			K								
	PO Number		Ship-To Locat			<u> </u>								
Su	pplier Item		Promised D		10/19/2013)									
Item	Description		Need-By D		10/15/2013)									
					10/19/2013)									
			Go Clear										\mathbf{N}	
													<u>\</u>	
	PO								-				O Previous	-25 - <u>Next 25</u> 3
Organizatio		Supplier Item	Item Description		Quant UOM Order		Ship-To Location	Carrie	Item r Number	Supplier Config ID	Supplier	Supplier Location	Promised Date 🔻	Need-By Date
NEORSD LE	13000008		ANTI-FREEZE PERMANENT IN ONE GALLON PLASTI CONTAINERS	C	GL 5	<u>0</u>	EMSC Internal Location		010020		INDUSTRIAL SAFETY PRODUCTS INC	<u>01</u>		09/24/2013 17:00:0
NEORSD LE	<u>13000008</u>		ANTI-FREEZE PERMANENT IN ONE GALLON PLASTI CONTAINERS	C	GL 5	Q	Field Office E 40th Street		010020		INDUSTRIAL SAFETY PRODUCTS INC	<u>01</u>		09/24/2013 17:00:0
NEORSD LE	<u>13000334</u>		TEST TO SEE IF WILL GO OVER TO EBS		EA 1	<u>0</u>	Southerly Internal Location				INDUSTRIAL SAFETY PRODUCTS INC	<u>01</u>	10/30/2013 00:00:00	10/30/2013 00:00:0
NEORSD LE	<u>13000289</u>		hsofhoiusdhviuhsdhvi		EA 1	Q	Easterly Internal Location				INDUSTRIAL SAFETY PRODUCTS INC	<u>01</u>	10/12/2013 00:00:00	10/12/2013 00:00:0
						0	Easterly Internal				INDUSTRIAL SAFETY	01	10/02/2013 00:00:00	10/02/2013 00:00:0
NEORSD LE	<u>13000235</u>		ewippejwnwevnwbvoi eoi wjeoif		EA 1	<u>u</u>	Location				PRODUCTS INC	-	10/02/2015 00:00:00	
NEORSD LE	13000235 13000234		ewippejwnwevnwbvoi eoi wjeoif Iasnlknalkjvnkjasnvwkj		EA 1 EA 1	<u>م</u> ۵						_	10/02/2013 00:00:00	

The **Delivery Schedules** window shows search results in summary.

3- Note the multiple fields of information, included comparison of **Promised Date** and **Need-By Date**.



Shipment Receipt Details

Regional Sewer District iSupplier Po	ortal
Home Orders Shipments Finance Delivery Schedules Shipment Notices	
Delivery Schedules	

1- Click the **Receipts** link under the **Shipments** tab.

Home	Orders	Shipments Finan	ice Admin	1				
Delivery	Schedules	Shipment Notice	s Shipment	Schedules Recei	ipts Returns	Overdue Receipts	On-Time	Performance
View R	eceipts							
								Export
Simol	e Search							
Chinp	C Creation							
								Advanced Search
Re	aceipt Num	ber	_	Inventory	Organization	si.	Q	
	PO Num		-	I	tem Number	51	Q	
P	elease Num	(example : 1234)		S	Supplier Item		Q	
i.	cicase marin	(example : 1234-2)		Iten	n Description			
Ship	ment Numi	ber						
	Shipped Da	and the second second second						
	-	(example: 08/22/2016 Go Clear						
		Go Clear						

The **View Receipts** window is displayed. Multiple search criteria are available for query.

- 2- Enter the **PO Number** value.
- 3- Click the **Go** button.



		Admin Shipment S	chedules	Receipts	Returns	Overdue Re	ceipts O	n-Time Perf	ormance		
15											Export
arch											
										Advan	ced Search
Number		-	In	ventory Organ	nization		Q				
Number 16002	727	-		Item M	lumber		Q				
Contraction Contraction International Contraction Cont	: 1234)	_		Supple	er Item		0				
	+ 1234-3)										
Number		-		10011000	and and a l						
ped Date											
(example Go	08/22/2016) Clear										
Creation Date	Organization			Packing Slip	Containers		Freight Carrier	Bill of Lading	PO Number	Invoice	Attachment
06/23/2016 09:24:57	Southerly								16002727		
06/27/2016	EMSC								16002727		
	edules Shipme ts arch Number Number Number Number example (example (example Go Creation Date 06/23/2016 09:24:57	Adules Shipment Notices ts arch Number Number Number Number Number (example : 1234-2) Number (example : 08/22/2016) Go Clear Creation Date 06/23/2016 09:224:57 Southerly	dules Shipment Notices Shipment S ts arch Number 16002727 (example : 1234) Number (example : 1234-2) Number (example : 00/22/2016) Go Clear Creation Date Organization Shipment 06/23/2016 Southerly	edules Shipment Notices Shipment Schedules ts arch Number 16002727 (example : 1234) Number (example : 1234) Number (example : 1234-2) Number (example : 00/22/2016) Go Clear Creation Date Organization Shipment Shipped Date 06/23/2016 Southerly	Adules Shipment Notices Shipment Schedules Receipts ts arch Inventory Organ Item N Supple Item Des (example : 1234-2) Item Des (example : 02/22/2016) Go Clear Creation Date Organization Shipment Date D6/23/2016 D9:24:57	Adules Shipment Notices Shipment Schedules Receipts Returns ts Aarch Inventory Organization Item Number I6002727 (example : 1234) Number Supplier Item Item Description Teeation Date Organization Shipment Shipped Date Slip Containers D6/23/2016 Southerly	Adules Shipment Notices Shipment Schedules Receipts Returns Overdue Ret ts arch Inventory Organization Item Number Inventory Organization Item Number Item Description Item Descripti Item Description Item Description Item Description Item Descr	Adules Shipment Notices Shipment Schedules Receipts Returns Overdue Receipts O ts arch Number 16002727 (ecample : 1234) Number (ecample : 1234) Supplier Item (ecample : 1234) Number (ecample : 1234) Number (ecample : 1234) Number (ecample : 1234) Supplier Item (ecample : 1234) Number (ecample : 1234) Supplier Item (ecample : 1234) Number (ecample : 1234) Supplier Item (ecample : 1234) Receipts (ecample : 1234) Supplier Item (ecample : 1234) Suppl	Adules Shipment Notices Shipment Schedules Receipts Returns Overdue Receipts On-Time Performs ts arch Inventory Organization Item Number I6002727 (example : 1234) Number (example : 1234) Number (example : 1234) Item Description Item Descriptic Item Description Item Description Item Description	Adules Shipment Notices Shipment Schedules Receipts Returns Overdue Receipts On-Time Performance ts Inventory Organization Inventorganization	Adules Shipment Notices Shipment Schedules Receipts Returns Overdue Receipts On-Time Performance

Search results are displayed.

4- Click the link for the Receipt to view detail information.

Home Orders Delivery Schedule Shipments: Rece Receipt: 8542	s Shipme	Finance nt Notices	Admin Shipment Se	chedules	Receipts	Returns	Overdue Recept	5 (Dn-Time Performan	ce					
		S	Organizatio	er Southe er REXEL, te 01 er te lp		7					Waybil/Arr Freight Carr Bil of Lada Attachmen Received i Receiver Commen Suppler U	er 10 ts None 8y Wathey, Mark A ts		Ĩ	Export
Receipt Transa	actions														
Receipt Date 🔻		Need-By Date	Performance	PO	Line Shipment	Item/Job	Description	UOM	Ordered Returned	Net Received Ac	cepted Location	Attachments Invoid	Item category	Supplier	Receive
06/23/2016 09:14:44	06/29/2016 15:13:09	06/29/2016 15:13:09		16002722		625904	and the second sec	FT	1500	1500	0.0 Southerly Internal Location		EL01.EL01005		
06/23/2016 09:14:44	06/29/2016 15:09:22	06/29/2016 15:09:22	Early	16002727	2 1		STRUT POST BASE, SQUARE 6L X 6W IN" MFR# AP232SQEG	EA	8	8	0.0 Southerly Internal Location		HD01.HD01001		

Detail information for the receipt is displayed. Note the inclusion of **Performance** and **Net Received** information for the receipt.

5- Click the Return to Shipments: Receipts link.





Shipment Returns Detail

							in Navigate
Home Orders Shipments Finance	Admin						
Delivery Schedules Shipment Notices	Shipment Schedules	Receipts	Returns O	verdue Receipts 🕕 On-T	ime Performance		
View Receipts			7				
Simple Search							
Receipt Number				Organization	n	<u> </u>	
PO Number 13000326				Item Numbe	r	s 🔍	
Shipment Number				Supplier Iten	n	<u> </u>	
Shipped Date				Item Description	n		
(example: 10/19/2013							
Go Clear							
Receipt Creation Date	Organization	Shipment	Shipped Date	Packing Slip	Containers	Waybill/Airbill	Freight
<u>36</u> 10/19/2013 13:38:08	Easterly				1		
				Receipts Summary	1		

1- Click the **Returns** link under the **Shipments** tab.

												Mavig
Home	Orders	Shipments	Finance	Admin								
Deliver	y Schedules	Shipme	nt Notices	Shipment S	chedules	Receipts	Returns	Overdue Receipts O	n-Time	e Performance		
Return	is Summary	/										
Simp	le Search											
Note th	at the searc	h is case ins	ensitive									
	Org	anization						RMA Num	ber			
	PO	Number						I	tem		k	Q
	Receipt	Number						Supplier I	tem			Q
	Shipment	Number						Item Descrip	tion			
		→ ī	Go Clea	r								
Organ	ization	Receip	t Number	PO Number	Shipment I	Number RM	A Number	Receipt Creation Date	Item	Supplier Item	Item Description	UOM Q
No sea	rch conducte	ed.										

The **Returns Summary** window is displayed. Multiple search criteria are available for query.

2- To view **all** returns information, click the **Go** button.

Returns Sum	mary															
																Export
Simple Sear	rch															
Note that the s	search is case	insensitive													Advan	ced Search
	Organization	n		R	۹,			RMA Number								
	PO Number	r 🗌						Item	Q							
Re	eceipt Number	r					s	Supplier Item	Q				1			
Ship	ment Number	r					Iten	m Description								
		Go	Clear									K	K		K	
Organization	Receipt Number		Shipment Number	RMA Number	Receipt Creation Date -		Supplier Item	Item Descri	ption	UON	Quantity Received	Quantity Returned	Return Da	te		Supplier Config ID
NEORSD LE	29	13000289			10/08/2013 09:58:11			hsofhoiusdhv	uhsdhvi	EA	1	1	10/08/2013	14:12:00	POST	
NEORSD LE	14	13000225			10/01/2013 16:09:39			sdilpvhnsdvnl	sdjbnvkjbsdkjvbkj	EA	1	1	10/02/2013	10:22:02		
NEORSD LE	2	<u>13000018</u>		546664	09/06/2013 11:28:29	491077			ITH SPRING & PIN 94 63-0286/01 FOR HUMBOLDT 11.1 CENTRIFUGE SN P205	EA	3	1	09/06/2013	11:39:30	POST	

In the search results, detail information for the return is displayed.



3- Note the inclusion of **RMA Number**, **Quantity Returned**, **Return Date**, and **Reason** information for each return.

	rch														
Note that the :	search is case	insensitive												Advan	ced Search
	Organization			ы	۹,		F	RMA Number							
	PO Number							Item	Q						
Re	eceipt Number						5	Supplier Item							
Ship	oment Number						Iten	n Description							
		Go	Clear												
Organization	Receipt Number	PO Number	Shipment Number	RMA Number	Receipt Creation Date 🔻		Supplier Item	Item Descri	tion	UO	Quantity M Received	Quantity Returned	Return Date		Supplier Config ID
IEORSD LE	29	13000289			10/08/2013 09:58:11			hsofhoiusdhvi	uhsdhvi	EA	1	1	10/08/2013 14:12:00	POST	
IEORSD LE	14	13000225			10/01/2013 16:09:39			sdilpvhnsdvnk	sdjbnvkjbsdkjvbkj	EA	1	1	10/02/2013 10:22:02		
		13000018		546664	09/06/2013 11:28:29	491077		SEAL RING W	TH SPRING & PIN 94 63-0286/01 FOR HUMBO	OLDT EA	3	1	09/06/2013 11:39:30	POST	

4- Click the link for any Receipt Number to view detail information.

Denter Poncouros : Ompriorit notaco : Ompriorit Doncouros : Receipto : Retarios : Orbitale Receipto :	on this chomonee				
Shipments: Returns >					
Receipt Transactions					
					Export
PO Receipt Number Line Shipment Description	UOM Ordered Returned	Net Received Defects Location	Receipt Date Promised Date	Need-By Date	Performance
2 13000018 1 1 SEAL RING WITH SPRING & PIN 94 63-0286/01 FOR HUMBOLDT MODEL CP4-01.1 CENTRIFUGE SN P205	EA 10 <u>1.0</u>	1 Westerly Internal Location	09/06/2013 09/08/2013 11:27:22 17:00:00	09/08/2013 17:00:00	On-Time
Return to Shipments: Returns					Export

Detail information for the return is displayed.

5- Click the Return to Shipments, Returns link.



Overdue Receipts Detail

Northeast Ohi	Poistrict iSupplier I	Portal	-		- Contractor	
Home Orders	Shipments Finance	Admin				
Delivery Schedules	Shipment Notices	Shipment Schedules	Receipts Returns	Overdue Receipts	On-Time Performance	
Returns Summar	y			7		
			/			

1- Click the **Overdue Receipts** link under the **Shipments** tab.

										III Naviga
Home	Orders	Shipments	Finance	Admin						
Delivery S	Schedules	Shipment	t Notices	Shipment So	chedules	Receipts	Returns	Overdue Receipts	On-Time Performance	
Overdue	Receipt	S								
Simple	Search									
Note tha	at the sea	rch is case inse	ensitive							
Org	anization			(2					
PO	Number									
	Item			<u> </u>	2					
Supp	olier Item			<u> </u>	2					
1	Due Date			Ī						
		(example: 10/19/								
_	\rightarrow	Go Clea	ar							

The **Overdue Receipts** window is displayed. Multiple search criteria are available for query.

2- To view **all** overdue receipts, click the **Go** button.

Organizatio	PO Number	Item	Supplier Item	Item Description	Due Date		Quantity Ordered	Quantity Received	Ship-To Location	Carrier	Buver	Supplier Config ID
	13000289	ACOIN .		hsofhoiusdhviuhsdhvi	10/12/2013 00:00:00			0	Easterly Internal		Shomon, Linda E	
IEORSD LE	<u>13000235</u>			ewippejwnwevnwbvoi eoi wjeolf	10/02/2013 00:00:00	EA	1	0	Easterly Internal		<u>Shomon, Linda E</u>	
IEORSD LE	13000234			lasnlknalkjvnkjasnvwkj	10/02/2013 00:00:00	EA	1	0	Easterly Internal Location		Shomon, Linda E	
IEORSD LE	13000217			sfsgfdsfsdfsdf	10/01/2013 00:00:00	EA	1	0	Easterly Internal Location		Demmerle, Jennifer L	
EORSD LE	<u>13000036</u>			Testing accounts	09/30/2013 17:00:00	EA	1	0	Southerly Internal Location		<u>Demmerle,</u> Jennifer <u>L</u>	
IEORSD LE	13000210			DDDDD	09/30/2013 00:00:00	EA	1	0	Southerly Internal Location		<u>Demmerle,</u> Jennifer L	
VEORSD LE	<u>13000211</u>			test test	09/30/2013 00:00:00	EA	1	0	Admin Svcs Internal Location		Demmerle, Jennifer L	
VEORSD LE	<u>13000008</u>	010020		ANTI-FREEZE PERMANENT IN ONE GALLON PLASTIC CONTAINERS	09/24/2013 17:00:00	GL	5	0	Field Office E 40th Street		<u>Demmerle,</u> Jennifer <u>L</u>	
IEORSD LE	13000008	010020		ANTI-FREEZE PERMANENT IN ONE GALLON PLASTIC CONTAINERS	09/24/2013 17:00:00	GL	5	0	EMSC Internal Location		Demmerle, Jennifer L	
EORSD LE	<u>13000083</u>	391133		EPOXY PRIMER PART A	09/15/2013 17:00:00	GL	6	0	Administration Euclid Ave		<u>Demmerle,</u> Jennifer L	
VEORSD LE	13000083	137031		CLOTH DROP 12' X 15' CANVAS 8-OZ HEAVY WEIGHT FOR PAINTERS, TRIMCO #58903	09/15/2013 17:00:00	EA	5	0	Administration Euclid Ave		<u>Demmerle,</u> Jennifer L	
VEORSD LE	<u>13000086</u>	002626		ADAPTER BRASS FIRE HOSE SWIVEL STYLE 1 1/2" FEMALE CLEVE FIRE DEPT THRD X 1 1/2" FEMALE NPT DIXON #DFP15F15S	09/11/2013 17:00:00	EA	1	0	Easterly Internal Location		<u>Demmerle,</u> Jennifer L	
IEORSD LE	<u>13000053</u>			hlifsdghldhrlgkhdfikhkdf	09/11/2013 00:00:00	EA	1	0	Easterly Internal Location		<u>Demmerle,</u> Jennifer L	
IEORSD LE	13000018	491077		SEAL RING WITH SPRING & PIN 94 63-0286/01 FOR HUMBOLDT MODEL CP4-01.1 CENTRIFUGE SN P205	09/08/2013 17:00:00	EA	10	1	Westerly Internal Location		<u>Demmerle,</u> Jennifer L	
IEORSD LE	<u>13000018</u>	BIGMONEY- 1		2HP MOTOR	09/08/2013 17:00:00	EA	3	0	Southerly Internal Location		<u>Demmerle,</u> Jennifer <u>L</u>	
EORSD LE	13000024			edhgffd	09/08/2013 00:00:00	EA	1	0	Easterly Internal Location		<u>Demmerle,</u> Jennifer L	
IEORSD LE	13002622			Miscellaneous	08/30/2013 00:00:00	EA	1	0	EMSC Internal Location		Brooks, Antwane	

Search results are listed by **PO Number**, with latest **Due Date** listed first.



3- Click the indicator next to **Due Date** to change the sequence.

Organization	PO Number	Item	Supplier Item	Item Description	Due Date 🔿	цом	Quantity Ordered	Quantity Received	Ship-To Location	Carrier	Buver	Supplier Config ID
	13002622	ACC.III	ACC.III	Miscellaneous	08/30/2013 00:00:00			0	EMSC Internal	Currici	Brooks, Antwane	
EORSD LE	13002622			Miscellaneous	08/30/2013 00:00:00	EA	6	0	EMSC Internal Location		Brooks, Antwane	4
IEORSD LE	<u>13002622</u>			Miscellaneous	08/30/2013 00:00:00	EA	1	0	EMSC Internal Location		Brooks, Antwane	l
IEORSD LE	<u>13002622</u>			Miscellaneous	08/30/2013 00:00:00	EA	1	0	EMSC Internal Location		Brooks, Antwane	i
IEORSD LE	13002622			Miscellaneous	08/30/2013 00:00:00	EA	1	0	EMSC Internal Location		Brooks, Antwane	4
IEORSD LE	13002622			Miscellaneous	08/30/2013 00:00:00	EA	1	0	EMSC Internal Location		Brooks, Antwane	4
IEORSD LE	13002622			Miscellaneous	08/30/2013 00:00:00	EA	1	0	EMSC Internal Location		Brooks, Antwane	4
IEORSD LE	13002622			Miscellaneous	08/30/2013 00:00:00	EA	1	0	EMSC Internal Location		Brooks, Antwane	4
IEORSD LE	13002622			Miscellaneous	08/30/2013 00:00:00	EA	6	0	EMSC Internal Location		Brooks, Antwane	4
IEORSD LE	<u>13002622</u>			Miscellaneous	08/30/2013 00:00:00	EA	6	0	EMSC Internal Location		Brooks, Antwane	1
IEORSD LE	<u>13002622</u>			Miscellaneous	08/30/2013 00:00:00	EA	1	0	EMSC Internal Location		Brooks, Antwane	1
IEORSD LE	<u>13002622</u>			Miscellaneous	08/30/2013 00:00:00	EA	1	0	EMSC Internal Location		Brooks, Antwane	1
IEORSD LE	<u>13002622</u>			Miscellaneous	08/30/2013 00:00:00	EA	2	0	EMSC Internal		Brooks, Antwane	1
IEORSD LE	<u>13002622</u>			Miscellaneous	08/30/2013 00:00:00	EA	2	0	EMSC Internal Location		Brooks, Antwane	1
IEORSD LE	<u>13002622</u>			Miscellaneous	08/30/2013 00:00:00	EA	4	0	EMSC Internal Location		Brooks, Antwane	r i

The listing now displays earliest **Due Date** listed first.

Guide

4- Click the indicator next to **Due Date** to return to the original sequence.





On-Time Performance Detail

Noi Reg	theast Ohi Ional Sewe	District iS	upplier P	ortal
Home	Orders	Shipments	Finance	Admin
Delivery	Schedules	Shipment	Notices	Shipment Schedules Receipts Returns Overdue Receipts On-Time Performance
Overdu	e Receipt	S		7
177				

1- Click the **On-Time Performance** link under the **Shipments** tab.

Home Orders Sh	ipments Finance	Admin				
Delivery Schedules	Shipment Notices	Shipment Schedule	s Receipts	Returns Ove	rdue Receipts 🛛	On-Time Performance
On-Time Performance)					
Simple Search						
Note that the search i						
Organization	NEORSD LE	<u> </u>	PO Number	16001937 🧲		
Due Date		S	hipment Number			
	(example: 08/22/2016)		Item		Q	
Receipt Number		Way	bil/Airbill Number			
Supplier Item		<u> </u>	big Airbin Harriber	1		
Delivery Status						
	Go C	lear				

The **On-Time Performance** window is displayed. Multiple search criteria are available for query.

- 2- Enter the **PO Number** value.
- 3- Click the **Go** button.

Simple Sear	ch									(
Note that the :	search is cas	e insensitive							Adv	anced Sean
Organ	nization NE	ORSD LE	۹.	PO Number 160	01937					
Du	e Date		SI	hipment Number						
	_	emple: 06/22/2016)		Item		_ Q				
Receipt N	lumber		Wave	oil/Airbil Number		_				
Supple	er Item	3	9							1
Delivery	Status									
		Go Clear	-							¥
	PO		Receipt			Supplier			Quantity	Delivery
Organization	Number	Due Date 🛩	Number	Receipt Date	Item	Item	Description	UOM	Received	Status
NEORSD LE	16001937	09/30/2016 16:00:59	8255	05/27/2016 12:27:56	i		1785-L40E/E Firmware upgrade to "K"Expedited Repair \$1,371 Est. 1-2 weeks lead time, 18 month warrenty	EA	1	Early

Performance information for the specific PO is displayed. Note the inclusion of **Delivery Status**.

4- Click the **Clear** button to perform another search.



On-Time Performance	e			
Simple Search				
Simple Search				
Note that the search is	case insensitive			
Organization	<	PO Number		
Due Date		Shipment Number		
	(example: 10/19/2013)	Item		Q
Receipt Number			_	
Supplier Item	<	Waybill/Airbill Number		
Delivery Status	Late -			
	Go Clear			

- 5- Select the Late value in the Delivery Status field.
- 6- Click the **Go** button.

Simple Search									
Note that the search is co Organization Due Date Receipt Number Suppler Item	se insensitive	4	PO Number Shipment Number Rem Waybil/Azbil Number	<u> </u>	q			Advanc	oed Search
Delvery Status	ate . Go Clea		1				Distant	1-25	Next 25 G
PO Organization Number	Due Date -	Receipt Number		NEORSD	Supplier Item	Description		Quantity Received	Delivery Status
NEORSD LE 16001747	05/19/2016 13:08:49	2812	06/27/2016 08:12:03	083376		BOX OUTLET 2 GANG 3/4" SHALLOW BOX ADALET NO FS2C-3 3/4 IN TY "MUST HAVE UL LISTING"	EA	2	Late
NEORSD LE 16001572	04/29/2016 15:35:24	8425	06/20/2016 09:03:45	113032		TY-RAP 5.5" 30L8 NATURAL NYLON 6.6 S/S SELF LOCKING DEVICE 1.125" BUNDLE MAX DIMENSIONS 0.140"W X 5.50"L, "MUST HAVE UL LISTING" PANDUIT 8T1.51M	EA	3000	Late
NEORSD LE 16001585	04/28/2016 08:54:49	8150	05/18/2016 14:08:16	250-963201	EPS-300 3M	TUBING HEAT SHRINK ASSORTED PACK OF 6" LENGTHS 1/8" TO 1" THICK ALPHA WIRE FIT 321 MS 1	PK	2	Late

Search results are displayed for all late shipment deliveries.

7- Note the inclusion of **Due Date** and **Receipt Date** for comparison purposes.

Northeast Ohio Regional Sewer District iSupplier Training Protecting Your Health and Environment

iSupplier Home Page – Finance Tab **Topic 4:**

iSupplier portal users will have direct access to multiple levels of financial information through the Finance tab. This tab provides links to invoice and payment information.

This topic covers:

- Overview of the Finance tab and summary information
- Review of Invoice details

Guide

• Review of Payments details

	rtheast Of glonal Sew	er DistrictİSU	pplier P	ortal	 and the second		
						đ	Navigat
Home	Orders	Shipments	Finance	Admin			
Create	Invoices	View Invoid	es Vie	w Payments			
View In	voices						

The Home Page is displayed.

- 1- Click on the Finance tab.
- 2- Click the View Invoices link.

Invoice Information

Home	Orders	Shipments	Finance	Admin					
Create	Invoices	View Invoi	oes Vie	w Payment	5				
View In	voices								
Simp	le Search								
In	voice Numb	per				Payment Status			
	PO Numb	per 1600231	3 (_	Ir	voice Amount From		То	
		(example : 12	234)	_		Amount Due From		То	
Re	lease Numb	er (example : 12	24.2)			Invoice Date From		то	
Pay	ment Num		344	_		Due Date From			
	Invoice Stat		-			Due Date From	(example: 08/22/2016)	то	
	_	→ Go	Clear						

The View Invoices window is displayed. Note the multiple criteria available for query.

- 3- Enter the value in the **PO Number** field.
- 4- Click the **Go** button.



Invoice Number					Paymer	t Status						Advanced Search
PO Number	16002313			1	Invoice Amou		1220	то				
	(example : 1234)	_			Amount D	ue From		To				
Release Number					Invoice Da	-		To				
Payment Number	(example : 1234-2)	_				ate From		то				
Invoice Status	-				Due Di	(ea	mple: 08/22/2016)	10 1				
	Go Clear											
	oice Date - Type	Amount	Due Status	On Hold	Payment Status	Remit-to Supplier	Remit-to Supplier Site	Due Date	PO Payment Number	Receipt	Discount Date	Available Discount Attachmen
5113965078.001 06/0	06/2016 Standar	d 921.83 9	21.83 Approved		Not Paid			07/06/2016	16002313		11000	<u>(</u>)

Search results are displayed in summary for all invoices related to the PO.

5- Click the **link** under **Invoice** to view details.

Finance: View Invo											
	S113965078.001 (Total USD 921.83)										
Currency=USD								V			Export
-					-	Payment Information					
General		Amount Summar	/ 3			Paid 0.00					
						1	Discount Ta	ken 0.0)		
Invoice Date	06/06/2016	Item 921.83						Due 921			
Status	Approved	Freight 0.00					Sta	tus Not	Paid		
On Hold		Miscellaneous	Miscellaneous 0.00				Payment D	ate			
Batch	GM060716-1	Tax	Tax 0.00 💭			Payment					
Attachments	<u>View</u>	Prepayment	Prepayment 0.00			Term NET 30 DAYS				s	
Supplier	REXEL, INC	Retainage	0.00								
Supplier Site	02	Withholding Tax	0.00								
Address	02	Total	921.83								
	PO BOX 742384										
	ATLANA, GA 30374-2103										
Invoice Lines	Scheduled Payments Hold Reasons										
	1 🔶							ю	PO		
Inv Line 🔺 Type	Description		Qty UOM	Price	Tax Amount	Retainage	Status I	lumber	Line	Buyer	Receipt
1 Item	Explosion Proof LED Drop Light/Trouble Light Larson Elect C1d1-S0-1523	ronics EHL-LED-7W-120XLV-	1 EA	921.83	921.83	0.00	Approved]	6002313	1	Shomon, Linda	

Detail information for the invoice is displayed.

- 6- Note the **Payment Information** summary box.
- 7- Click the Scheduled Payments tab.

7 KANA CAU	PO BOX 742384 ATLANA, GA 30374-21	103 🗸	I OLAI	921.83			
Invoice Lines	Scheduled Payments	Hold Reasons					
Due Date	Amount	Remain	ing Amount Remit-to Supplier	Remit-to	o Supplier Site	Status	Method
07/06/2016	921.83		921.83			Not Paid	Check
Return to Finance	: View Invoices						Export

Payment Schedule information for the invoice is displayed.

8- Click the Hold Reasons tab.



	PO BOX 742384 ATLANA, GA 30374-21	103		TOUR JELIUJ			
Invoice Lines	Scheduled Payments	Hold Reasons					
Hold Name	Но	ld Reason	Hold Date	Release Name	Release Reason	Release Date	
No results found.							
Return to Finance	: View Invoices	-					Export

Hold and Release information for the invoice is displayed.

9- Click the Return to Finance: View Invoices link.





Payments Information

88 - {	🔮 NEORSD		🏉 iSupplier Portal: View In 🗙	
Nor	theast Ohio	District iS	upplier Portal	
- neg	ional sewer	District 10		
		A DESCRIPTION OF		
Home	Orders	Shipments	Finance Admin	
Home	Orders	Shipments		

1- Click the View Payments link under the Finance tab.

Home Orders Shipmen	ts Finance A	Admin								
Create Invoices View Inv	oices View Pa	ayments								
View Payments										
Simple Search										
Note that the search is case i	nsensitive									
Payment Number					Status		<u> </u>			
Invoice Number	35662 🔶	_		Payment Amou	nt From		Тс	b		
PO Number				Payment Da	te From		То		1	
\rightarrow	Go Clear			,		(example: 10/19/2013)				

The **View Payments** window is displayed. Note the multiple criteria available for query.

- 2- Enter the value in the Invoice Number field.
- 3- Click the **Go** button.

						🗰 ivavigator 👻	Havonies - H	iome Logout Preferenc	es Diagnostics
Home Orders	Shipments Finance Admin								
Create Invoices	View Invoices View Payment	s							
View Payments									
									Export
Simple Search									
	ch is case insensitive			Status		1			Advanced Search
					X				
	e Number 35662		Payme	nt Amount From		0			
P	O Number		Pay	ment Date From	То				
	Go Clear				(example: 10/19/2013)				
Payment	Payment Date 🔻	Currency	Amount Method	Status	Status Date	Bank Account		Invoice	PO Number
1123	10/08/2013	USD	100.00 Check	Negotiable	10/08/2013	KEY CONTROLLED DISBURSE	MENT	35662	13000332

Search results are displayed.

4- Click the **link** under the **Payment** to view detail information.



							Navigator V Me Favorites V	Home Logout	Preferences Diagnostics
Home Orde	ers Shipments Finance	Admin							
Create Invoice	es View Invoices Vie	w Payments							
Finance: Viev	v Payments >								
Payment: 11	23 (Total USD 100.00)								
									Export
			Payment Date 10				INDUSTRIAL SAFETY PRODUCTS INC		
			Method Ch Status Ne			Supplier Site	01 6091 CAREY DR		
			Status Date 10			Address			
						Bank Account	VALLEY VIEW OH 44125 KEY CONTROLLED DISBURSEMENT		
						bunk / lecount	RET CONTROLLED DESDORSEMENT		
Included In	nvoices	•							
Invoice	Invoice Date	Туре	Currency	Amount Status	Payment Status		Payment PO Number	Receipt	Attachments
35662	10/08/2013	Standard	USD	100.00 Approved	Paid		100.00 13000332		
Return to Fina	ance: View Payments								Expo

Detail information for the payment is displayed. If desired, user can drill down on details for all **Included Invoices** associated with the payment.

5- Click the **Return to Finance, View Payments** link.



Topic 5: Create Invoices

Registered iSupplier users can create and submit invoices directly through the portal. Once submitted, the invoice status can be viewed online through standard inquiry screens.

This topic covers:

- Invoice creation and submission
- Confirmation of invoice submission status

Invoice Creation

No Rep	rtheast Ohi gional Sewe	PDistrict iS	supplier Portal	1		Concession of the local division of the loca
Home	Orders	Shipments	Finance Admin	1		
Se	arch PO	Number	•	GO		

The **Home** tab is displayed.

1- Click on the **Finance** tab.

Regional Sewer District iSupplier Portal		
Home Orders Shipments Finance Admin Create Invoices View Invoices View Payments	nî Navigator 🕶 🗟 Favorites 🕶 Home Logout Preferences Help P	ersonali. Page
Invoice Actions		
TIP This search is case sensitive and will only render invoices that have been of Personalize "Invoices Query Region" Search Personalize "Search" Note that the search is case insensitive	Create Invo	ce With a PO GO
Supplier INDUSTRIAL SAFETY PRODUCTS INC	Purchase Order Number	
Invoice Date From (example: 01/17/2019)	Invoice Antonic	
Invoice Status Go Clear	Currency	

The Invoice Actions window is displayed.

2- Using the **Create Invoice with a PO** action box, click the **Go** button.

Home Orders Shipments Finance Admin							
Create Invoices View Invoices View Payme	nts						
<u>@</u>		·				O	
Purchase Orders		Details		Manage Tax		Review and Submit	
Create Invoice: Purchase Orders							
						Cance! Step 1	of 4 Next
Search							
Note that the search is case insensitive						Advanc	ed Search
Purchase Order Number	13000326 <						
Purchase Order Date							
Buyer Organization	(example: 10/19/2013)						
Advances and Financing	Excluded -						
\rightarrow	Go Clear						
Select PO Number Line Shipment	Advances or Financing	Item Description	Supplier Item Number	Ordered Receiv	ed Invoiced UOM U	it Price Curr Ship To Organization Packing Slip	Waybill
No search conducted.							



The Create Invoice: Purchase Orders window is displayed.

- 3- Using the **Search** window, enter the value in the **Purchase Order Number** field.
- 4- Click the **Go** button.

Selec	t Items: A	dd to	Invo	oice												
	t All <u>Select N</u>		ne Sh		Advances or Financing	Item Description	Supplier Item Number	Ordered	Received	Invoiced	Unit JOM Pric	e Cu	ırr Ship To	Organization	Packing Slip	Waybill
× 	<u>13000326</u>	1	1			GLOVES WELDERS, PREMIUM GRADE COW LEATHER, LARGE MIG/TIG WING THUMB 4.5" GAUNTLET SPLIT COW CUFF, MCR MUSTANG 4950L *NO SUBSTITUTION OF SPECIFICATIONS*	UNKNOWN	2	2	0 F	PR 8.77	57 US	D Easterly Internal Location	NEORSD LE		
														Cance!	5tep 1 of 4	Ne <u>x</u> t

Search results are displayed, showing all eligible PO lines.

- 5- Click the **Select** button next to line for **PO Number**.
- 6- Click the Add to Invoice button.

Select I	ltems:	Add to Invoice										
Select A	II Select	None										
	PO Number	Line Shipment	Advances or Financing	Item Description	Supplier Item Number		Received Invo		Unit Price C	urr Ship To	Pa Organization Sli	cking p Waybill
	13000326	1 1		GLOVES WELDERS, PREMIUM GRADE COW LEATHER, LARGE MIG/TIG WING THUMB 4.5" GAUNTLET SPLIT COW CUFF, MCR MUSTANG 4950L "NO SUBSTITUTION OF SPECIFICAT	UNKNOWN	2 2	2 0	PR 8	8.7767 U	5D Easterly Internal Location	NEORSD LE	
Purcha	ase Order	Items Added	to Invoice			_	_	_	_	_		
Select 1	Items:	Remove from I	nvoice									
Select A	II Select	None										
	PO Number	Line Shipment	Item Descriptio	n		Supplier Ite Number		Received	Invoiced	Unit UOM Price	Curr Ship To	Organization
	13000326			S, PREMIUM GRADE COW LEATHER, LARGE MIG/TIG WING THUMB 4.5" GAUNTLET SPLIT (950L *NO SUBSTITUTION OF SPECIFICATIONS*	COW CUFF, 278802	UNKNOWN	2	2	0	PR 8.7767	USD Easterly Internal Location	NEORSD LE
											Cance! Step	1 of 4 Next

The line is now included in the Purchase Order Items Added to Invoice window.

7- Click the **Next** button.

Create Invoices View Invoices View Payments							
0					()		
Purchase Orders	Details	Manage Tax	c		Review and Submi	t	
Create Invoice: Details							
* Indicates required field					Cancel	Back Step	2 of 4 Next
Supplier		Invoice					
* Supplier INDUSTRIAL SA Tax Payer ID 34-1792160 * Remit To Address Remit To Bank Account Unique Remittance Identifier Remittance Check Digit			Invoice Typ	te 10/19/2013 (comple: 10/19/2013) pe Invoice • Ory USD	t None Add		
Customer							
* Customer Tax Payer ID Customer Name Address	Q						
Items							1
PO Number Line Shipment Item Description			Supplier Item Number Ship		*Quantity	Unit Price	UOM Amount
13000326 1 1 GLOVES WELDERS, PREMIUM GRADE COM MUSTANG 4950L *NO SUBSTITUTION OF	V LEATHER, LARGE MIG/TIG WING THUMB 4.5" GAUNTLET SPL SPECIFICATIONS*	T COW CUFF, MCR	UNKNOWN East	erly Internal 2 ation		2 8.7767	PR 17.55

The **Create Invoice: Details** window is displayed. Use this window to complete detail information for the invoice.

Note: Required fields are indicated with * and must be completed to proceed from this window.

8- If not defaulted, use the **Search** (magnifying glass) icon to find the appropriate **Remit To** value.



Search and S	Select: Remit To				
					Cancel Select
Search					
To find your	item, select a filter item in the p	oulldown list and ente	er a value in the tex	t field, then select the	e "Go" button.
Search By R	emit To 🔻	Go	←		
o control y					
Results					
Select	Quick Select	Supplier	Remit To	Address	Organization
	No search conducted.				
About this Pa	ge				
					Cance! Select

The **Search and Select** window is displayed.

9- Click the Go button.

Search and Select: Remit To			
		(Cancel Select
Search			
To find your item, select a filter item in the pulldown list and ent Search By Remit To Go Results	er a value ir	n the text field, then select the "Go" button.	
Select Quick Select Supplier	Remit To	Address	Organization
INDUSTRIAL SAFETY PRODUCTS INC	01	6091 CAREY DR VALLEY VIEW OH 44125	NEORSD LE
About this Page			
		Са	nce <u>l</u> Select

The **Results** window is displayed.

10- Use the **Quick Select** button to select the appropriate **Remit To** value.

Create Invoices View Invoices View Payr	nents		
0			0
Purchase Orders	Details	Manage Tax	Review and Submit
Create Invoice: Details			
* Indicates required field			Cance! Back Step 2 of 4 Next
Supplier		Invoice	
Tax Payer ID * Remit To	6091 CAREY DR VALLEY VIEW DH 44125	Invoice Number Invoice Number Invoice Date Invoice Type Correcy Invoice Description Invoice Description Teet	10/19/2013 (example: 10/19/2013) Invoice •
			Attachment None Add

The **Remit To** value is entered into the field.

11- Enter the appropriate value in the **Invoice Number** field.



12- Enter the appropriate value in the **Invoice Date** field. (Use the **Calendar** icon or enter date manually into field).

Customer	
* Customer Tax Payer ID Customer Name Address	<u> </u>

In the **Customer** section of the window:

13- If not defaulted, use the **Search** (magnifying glass) icon to find the appropriate **Customer Tax Payer ID** value.

Search	and Select: Custome	er Tax Payer ID				
					Can	ce <u>l</u> Select
Searc	h					
	d your item, select a fil By Registration Numl	·	ist and enter a	Go Go	en select the "Go" button.	
Result	ts					
Select	Quick Select	Registration Number	Legal Entity	Legislative Category	Country Of Registration	Legal Address
	No search conducted.					
About	<u>this Page</u>					

The Search and Select window is displayed.

14- Click the Go button.

Search	h					
To find	your item,	select a filter item in the p	ulldown list a	and enter a value in t	he text field, then select t	he "Go" button.
Search	By Registr	ration Number 🔻		Go		
Result	S					
	Quick		Legal	Legislative	Country Of	
Select	-	Registration Number 🔺	Entity	Category	Registration	Legal Address
\odot		SYS11976	NEORSD LE	Income Tax	US	3900 Euclid Ave Cleveland Cuyahoga 44115
About t	his Page					
						Cance! Select

The **Results** window is displayed.



15- Use the **Quick Select** button to select the appropriate **Registration Number** value.

										-
Pu	rchase Orders	Details	Manage Tax				Review and Submit			
Create Invoice: Details										
* Indicates required field							Cance <u> </u> B	ac <u>k</u> Step	2 of 4	Ne <u>x</u> t
Supplier			Invoice						1	7
Unique	* Supplier Tax Payer ID * Remit To Address Remittance Identifier emittance Check Digit	TEW OH 44125		Invoice Ty Currer Invoice Descript	ate 10/19/201 (example: 10/ pe Invoice ncy USD	19/2013) ▼	None Add			
Customer										
Items	* Customer Tax Payer ID SYS1197/ Customer Name NEORSD L Address 3900 Eucl									
10000										
PO Number Line Shipment It					р То	Available Quantity	*Quantity	Unit Price	UOM	Amount
	LOVES WELDERS, PREMIUM GRADE COW LEATHER, I USTANG 4950L *NO SUBSTITUTION OF SPECIFICAT.	ARGE MIG/TIG WING THUMB 4.5" GAUNTLET SPLIT CO IONS*	OW CUFF, MCR		terly Internal ation	2		2 8.7767	PR	17.55

All required fields have now been entered for the invoice. Additional changes can be made if necessary. 16- Click the **Next** button.

Shipping and Handling		
Charge Type Freight Add Row	Amount 14.25	UPS Ground
	Hanna Ondara Oktavarda Pi	Cancel Back Step 2 of 4 Next

At the bottom of the page, **Shipping and Handling** or other miscellaneous charges can be added to the invoice.

17- Click the Add Row button and select the Charge Type. Add Amount and Description.

18- Click Next button.



items									
PO lumber	Line	Shipment	Item Description		Supplier Item Number	Ship To	Available Qty	Quantity To Invoice UOM	Unit Price Amou
6002831	1	1	SIGNAL CONDITIONER, BULLETIN 931, ACITIVE CONVE BRADLEY 931U-C9C7C-BC	TER, 3 WAY, UNIVERISAL, ALLEN		EMSC Internal Location	5	5.00 EA	418.60 2,093.
Shipping	and	Handling							
harge Typ	ре				Amou	nt Description			
eight					14.	25 UPS Ground			
Invoice S	umm	ary							
								Items Less Retainage Freight Miscellaneous Tax	2,093.0 0.0 14.2 0.0 0.0
						Cancel	Recalculate	Back Step 3 of 4 Ne	2,107.2 xt Submi

Review the invoice information.

19- Click the Submit button.

Regional Sewer District iSupplier Portal		â Na	rigator 🔻 👒 Favorites 🔫	Home Logout Preferences H
Home Orders Shipments Finance Admin				
Create Invoices View Invoices View Payments				
0	0	•		
Purchase Orders	Details	Manage Tax		Review and Submit
Confirmation Invoice ISS67212 was submitted to our Accounts Payable department o Invoice: ISS67212	n 10/19/2013. The confirmation number for t	his invoice is the invoice number. You can query its statu	is by using Search by navigating t	o the Home page.

The **Confirmation** window is displayed. The invoice has now been submitted to the NEORISD AP Department.

Confirmation of Invoice Submission Status

No Re	rtheast Ohio gional Sewer District İ	iSupplier Portal	
lome	Orders Shipments	5 Finance Admin	
Create	Invoices View Inv	voices View Payments	
	7	0	0
	Purc	hase Orders	Details

To confirm the status of the submitted invoice:

1- Click the **View Invoices** link.



Home Orders Shipmen	ts Finance Admin					
Create Invoices View In	voices View Paymen	ts				
View Invoices						
Simple Search						
Invoice Number	IS567212 🔶		Invoice Amount From		То	
PO Number			Amount Due From		То	
Payment Number			Invoice Date From	Та		
Invoice Status	-		Due Date From	Та	,	
Payment Status	-			(example: 10/19/2013)		
\rightarrow	Go Clear					

The View Invoices window is displayed.

- 2- Enter the value in the Invoice Number field.
- 3- Click the **Go** button.

					100 C 100 C					ator 👻 📑	Havorites	Home Logo	ut Preferences F	telp Diagnostics
Home Order	rs Shipmen	ts Finance	Admin											
Create Invoices	View In	voices View	/ Payments											
View Invoices	s													
														Export
Simple Sear	ch													
														Advanced Search
							_							
Inv		IS567212				Invoice Amount	From	То						
	PO Number					Amount Due	From	То						
Payr	ment Number					Invoice Date	From	📰 То						
I	nvoice Status	-				Due Date	From	то						
Par	yment Status		•				(example	: 10/19/2013)						
	/	Go Clear	1			/	•							
Invoice	Invoice Dat	te 🔻	Туре	Currency	Amount	Due Status 🖌	On Hold	Payment Status	Due	Date	Payment	PO Number	Receipt	Attachments
IS567212	10/19/2013		Standard	USD	17.55	17.55 In-Process		Not Paid	11/17	/2013		13000326		

Search results are displayed.

4- Note the summary information for the invoice, including the **Status** of In-Process.

iSupplier Training Guide Northeast Ohio Regional Sewer District Protecting Your Health and Environment

Topic 6: Create Advance Shipment Notices

Registered iSupplier users can create and submit Advance Shipment Notices (ASN) directly through the portal. Once submitted, the status of the ASN can be viewed online through standard inquiry screens.

This topic covers:

- Creation steps for Advance Shipment Notices
- Steps for viewing submitted Advance Shipment Notices
- Steps for cancelling submitted Advance Shipment Notices

Advance Shipment Notice (ASN) Creation

ne Orders Shipments Finance Admin Search PO Number Go

The **Home** tab is displayed.

1- Click on the **Shipments** tab.

Northeast Regional S	Dhio wer District İS	Supplier P	ortal
Home Orde	s Shipments	Finance	Admin
Delivery Sche	dules Shipm	ent Notices	Shipment Schedules Receipts Returns Overdue Receipts On-Time Performance
Delivery Scho	dules	K	

The **Shipments** window is displayed.

2- Click the **Shipment Notices** link.

No Rej	rtheast Ohi gional Sewe	n District i S	upplier F	Portal	-			C. C. C. C. C. C. C. C. C. C. C. C. C. C	
Home	Orders	Shipments	Finance	Admin					
Delivery	Schedules	Shipmen	t Notices	Shipment Schedule	s Receipts	Returns	Overdue Receipts	On-Time Performance	
Shipn	nent Notic	es							
		<u>Shipment Notic</u> Shipment Billin	_						
Uploa	d Advance	Shipment and	Billing Notic	es					
View	/ Cancel Ad	lvance Shipme	nt and Billin	<u>g Notices</u>					



The Shipment Notices window is displayed.

3- Click the Create Advance Shipment Notices link.

Home	Orders Shipments Finance Admin y Schedules Shipment Notices Shipment Notice advance Shipment Notice s Go Shipments Due This Week Go Shipments Due Any Time Shipment Supplier Item Item Description Due Date Quantity Ordered Quantity Received UOM Ship-To Location Orga No results found. to Shipments: Shipment Notices																
Delivery	Schedules	Shipme	nt Notices	Shipm	ent Schedules	R	eceipts	Re	eturns	Ov	erdue Re	ceipts	On-	Time Pe	erform	ance	
Shipme	nts: Shipm	ent Notices 🗦	>														
Create	Advance	Shipment No	tice														
Views	5																
View				Go													
Select				upplier Ite	n Item Descr	iption	Due Da	te Qu	antity	Order	ed Quan	tity Re	eceived	UOM S	hip-To) Locati	on Orga
	No results	found.															
Return	to Shipmen	ts: Shipment	Notices														

The **Create Advance Shipment Notice** window is displayed. To search for shipments, use the **Views** window.

- 4- Select the Shipments Due Any Time value in the View field.
- 5- Click the **Go** button.

Create	Advance S	ihipment l	Notice									
Views												
			Time 👻 Go d to Shipment							OPREVIOU:		ved Search
Select (All Select I	None										
	PO Number	Line Shipi	Supplier ment Item	Item Description	Due Date 🔺	Quantity Ordered	Quantity Received UOI	A Ship-To Location	Organization Name	Ship-To Organization	Curren	Supplier cy Site
	13002622	3	1	Miscellaneous	08/30/2013 00:00:00	1	0 EA	EMSC Internal Location	NEORSD LE	EMSC	USD	01
	13002622	4	1	Miscellaneous	08/30/2013 00:00:00	2	0 EA	EMSC Internal Location	NEORSD LE	EMSC	USD	01
	13002622	2	1	Miscellaneous	08/30/2013 00:00:00	1	0 EA	EMSC Internal Location	NEORSD LE	EMSC	USD	01
	13002622	1	1	Miscellaneous	08/30/2013 00:00:00	1	0 EA	EMSC Internal Location	NEORSD LE	EMSC	USD	01
	13002622	19	1	Miscellaneous	08/30/2013 00:00:00	1	0 EA	EMSC Internal Location	NEORSD LE	EMSC	USD	01
	13002622	18	1	Miscellaneous	08/30/2013 00:00:00	4	0 EA	EMSC Internal Location	NEORSD LE	EMSC	USD	01
	13002622	17	1	Miscellaneous	08/30/2013 00:00:00	1	0 EA	EMSC Internal Location	NEORSD LE	EMSC	USD	01
	13002622	16	1	Miscellaneous	08/30/2013 00:00:00	6	0 EA	EMSC Internal Location	NEORSD LE	EMSC	USD	01
	13002622	15	1	Miscellaneous	08/30/2013 00:00:00	1	0 EA	EMSC Internal Location	NEORSD LE	EMSC	USD	01
	13002622	14	1	Miscellaneous	08/30/2013 00:00:00	1	0 EA	EMSC Internal Location	NEORSD LE	EMSC	USD	01
	13002622	13	1	Miscellaneous	08/30/2013 00:00:00	6	0 EA	EMSC Internal Location	NEORSD LE	EMSC	USD	01
	13002622	12	1	Miscellaneous	08/30/2013	6	0 EA	EMSC Internal	NEORSD LE	EMSC	USD	01

Eligible shipment lines are displayed as a result of the query.

6- Click the **Advanced Search** button.



Home Orders Shipments Finance Admin
Delivery Schedules Shipment Notices Shipment Schedules Receipts Returns Overdue Receipts On-Time Performance
Shipments: Shipment Notices >
Create Advance Shipment Notice
Advanced Search
To search, please enter at least one search criteria.
Specify parameters and values to filter the data that is displayed in your results set.
Show table data when all conditions are met.
Show table data when any condition is met.
PO Number is 🔹 13000083
Ship-To Location is 🗸
Supplier Site is 🗸
Item is - J Q
Go Clear Add Another Item - Add
Select PO Number Line Shipment Supplier Item Item Description Due Date Quantity Ordered Quantity Received UOM Ship-To Location Organization Name Ship-To Organization Currency Supplier Site
No search conducted.

The **Advanced Search** window is displayed. Use this window to narrow the search.

- 7- Enter the value in the **PO Number** field.
- 8- Click the **Go** button.

Select	All Select N	None										
	0.0											
Select	PO t Number	Line Sh	Supplier ipment Item	Item Description	Due Date 🔺	Quantity Ordered	Quantity Received UOM		Organization Name	Ship-To Organization	Currency	Supplier Site
>⊽	13000083	2	1	EPOXY PRIMER PART A	09/15/2013 17:00:00	6		Administration Euclid Ave	NEORSD LE	NEO_ITM_MST	USD	01
→7	<u>13000083</u>	1	1	CLOTH DROP 12' X 15' CANVAS 8-OZ HEAVY WEIGHT FOR PAINTERS, TRIMCO #58903	09/15/2013 17:00:00	5		Administration Euclid Ave	NEORSD LE	NEO_ITM_MST	USD	01
				Home Orders Shipments								

Search results are displayed for eligible shipment lines.

- 9- Click the Select button for each shipment line to be added.
- 10- Click the Add to Shipment Notice button.

Home Orders S	hipments Fi	inance Ad	min										
	Shipment N	iotices S	Shipment Schedules Receipts Returns Ove	erdue Receipts On-	Time Performa	nce							
Shipments: Shipment													
Create Advance Sh	ipment Notice	,											
K									Cancel	Add Shipmer	Preview	5	Bubmit
Shipment Header	Shipment L	ines											
Shipment Line Def	aults												
Packing Slip		lick Default to	o All Lines to copy to all shipment lines. Container Number										
Country Of Origin			Truck Number										
Bar Code Label			Comments										
	Default to												
Shipments in Adv	ance Shipmer	it Notice											
Show All Details Hi	do All Dotaile												
PO		Supplier			Quantity	Quantity			Quantity		Add		
Details Number I			Item Description		Ordered	Received	UOM			LPN/Lot/Serial		Split F	temove
B Show 13000083	2 1		EPOXY PRIMER PART A	09/15/2013 17:00:00	6	0	GL	<u> </u>	6 Administration Euclid Ave		•2	623	Û
	L 1		CLOTH DROP 12' X 15' CANVAS 8-OZ HEAVY WEIGHT FOR PAINTERS, TRIMCO #58903	09/15/2013 17:00:00	5	0	EA	<u> </u>	5 Administration Euclid Ave	[11]	42	65	Û

The lines are added in the **Shipments In Advanced Shipment Notice** section of the window. *Note:* User can change quantities, remove lines, or split lines as needed from this window.

11- Click the **Shipment Header** tab.



Home Orders Shipments	Finance Admin
Delivery Schedules Shipment	t Notices Shipment Schedules Receipts Returns Overdue Receipts On-Time Performance
Create Advance Shipment Not	ice
Shipment Header Shipment	t Lines
Shipment Information	
* Indicates required field	
* Shipment Number	101
	Note: Shipment Date cannot be later than
* Expected Receipt Date	Example: 10/19/2013 16:34:44
	Example: 10/19/2013 10:04.44
Freight Information	
Freight Terms	Freight Carrier
Number of Containers	
_	Bill of Lading
Waybill/Airbill Number	Packing Slip
Packaging Code	Special Handling Code
Tar Weight	Tar Weight UOM
Net Weight	Net Weight UOM
Comments	

The **Shipment Header** window is displayed. Use this window to complete header information for the ASN. *Note:* Required fields are indicated with * and must be completed to proceed from this window.

- 12- Enter the value in the **Shipment Number** field.
- 13- Click the **Calendar** icon for the **Shipment Date** field.

🏉 Pi	ck a Da	te - 🔽	🖉 McA	fee			_ 0	x
🤌 h	ittp://ep	procap	p4. neo	rsd.co	m :80	20/OA	_HTML/cab	10, 🖄
I	October		- 20:	13		• >		
Sun	Mon	Tue	Wed	Thu	Fri	Sat		
29	30	1	2	3	4	5	-	
6	7	8	9	10	11	J2		
13	14	15	16	17	18	19		
20	21	22	23	24	25	26		
27	28	29	30	31	1	2		
					Ca	nce <u>l</u>		
\varTheta Ir	nternet	Prote	ected M	lode: C)n	6 -	100% 🔍	•

The **calendar** is displayed.

14- Click the appropriate **day** value.





Home Orders Shipments Finance Admin	
Delivery Schedules Shipment Notices Shipment Schedules Receipts Returns Overdue Receipts On-Time Performance	X
Create Advance Shipment Notice	¥
	Cancel Add Shipments Preview Submit
Shipment Header Shipment Lines	
organieri raukez organieri cano	
Shipment Information	
* Indicates required field	
* Shipment Number 101 * Shipment Date 10/18/2013 16:42:20	
today	
Example: 10/19/2013 16:34:44	
Freight Information	
Freight Terms	
Number of Containers Bill of Lading	
Waybil/Arbill Number Packing Slip	
Packaging Code Special Handling Code	
Tar Weight Tar Weight UOM	
Net Weight Net Weight UOM	
Comments	
	Cancel Add Shipments Preview Submit

15- Repeat the process to enter the value for the **Expected Receipt Date** field.

Create Advance Shipment Not	lice							4	
						Cancel	Add Shipments	Preview	Submit
Shipment Header Shipmen	t Lines								
	11.								
Shipment Information									
Indicates required field									
* Shipment Number	101	* Shinment Date 1	0/18/2013 16:42:20						
* Expected Receipt Date			ote: Shipment Date cannot b	a later than					
Expected Receipt Date	Example: 10/19/2013 16:41:19		day						
Freight Information									_
Freight Terms	, a	Freight Carrier		2					
Number of Containers		Bill of Lading							
Waybill/Airbill Number		Packing Slip							
Packaging Code		Special Handling Code							
Tar Weight		Tar Weight UOM							
Net Weight		Net Weight UOM							
Comments									
								The second	Les
						Cancel	Add Shipments	Preview	Submit

Use the **Freight Information** section to add additional information if desired:

- 16- Enter value in the **Waybill/Airbill Number** field.
- 17- Click the **Preview** button.

Home Orders Shipments Finance Admin						
Delivery Schedules Shipment Notices Shipment Schedules	Receipts Returns Overdue Receipts On-Time Perfor	mance				
Advance Shipment Notice Information						
					Cancel Bac	sub <u>m</u> it
Shipment Information						
Shipment Number Expected Receipt Date	101 10/21/2013 16:42:28		Shipment Date 10	0/18/2013 16:42:20		
Freight Information						
Freight Terms Ship-From Location Code Number (of Charanes Vogek), Acid Terms Vogek), Acid Terms Faching Code Net Weight Net Weight	FX-3456		Comments Freight Carrier Bill of Lading Packing Silp Special Handling Code Tar Weight UOM Net Weight UOM			
Shipment Lines						
Snipment Lines						
Show All Details Hide All Details						
Details Number Line Shipment Supplier Item Item Description			antity Ordered Quantity Received UC			Attachments
Show 13000083 2 1 EPOXY PRIMER F		09/15/2013 17:00:00 6			ministration Euclid Ave	
H Show 13000083 1 1 CLOTH DROP 12	" X 15" CANVAS 8-OZ HEAVY WEIGHT FOR PAINTERS, TRIMCO #5890	3 09/15/2013 17:00:00 5	0 EA	5 <u>As</u>	Iministration Euclid Ave	

Review the completed ASN information.

18- Click the **Submit** button.



Northeast Ohio	District iSL	upplier P	ortal				- Contractor	
Home Orders	Shipments	Finance	Admin					
Delivery Schedules	Shipment	Notices	Shipment Schedules	Receipts	Returns	Overdue Receipts	On-Time Performance	
Advance Shipm	ent Notice Co	nfirmation	ĺ.					
Your Advance			s been submitted.					

The **Confirmation** window is displayed.

19- Click the Return to Advance Shipment Notices link.





View Advance Shipment Notices

Nor Reg	Northeast Ohio Regional Sewer District iSupplier Portal										
Home	Orders	Shipments	Finance	Admin							
	Schedules		t Notices		Receipts	Returns	Overdue Receipts	On-Time Performance			
Shipm	Shipment Notices										
Create Uploa	e Advance s d Advance s	Shipment Notic Shipment Billin Shipment and I Ivance Shipmer	<u>g Notices</u> Billing Notice	-							

The **Shipment Notices** window is displayed.

1- Click on the View / Cancel Advance Shipment and Billing Notices link.

					Contraction of the local sectors of the local secto	··· ivavigator · ·	- I avoinco -	nome cogour meletent	es rielp Diagnostics	
Home Orders Shipments	Finance Admin									
Delivery Schedules Shipme	ent Notices Shipment S	Schedules Receipts Retu	rns Overdue Rece	ipts On-Time Performance						
Shipments: Shipment Notices	>									
View / Cancel Advance Ship	View / Cancel Advance Shipment Notice									
									Export	
Views										
View Last 25 Shipment Notic	ces 👻 Go								Advanced Search	
Once a shipment notice is call	incelled it cannot be undone									
Select Advance Shipment N	otice Cancel Shipment M	lotice						M I I I I I I I I I I I I I I I I I I I		
Select Shipment Number	Shipment Date	Expected Receipt Date	Freight Carrier	Waybill/Airbill Number	Supplier Site	Invoice Number	Packing Slip	Processing Status Code	Cancellation Status	
© <u>101</u>	10/18/2013 16:42:20	10/21/2013 16:42:28		FX-3456	01			Pending		
Return to Shipments: Shipment	Notices								Export	

The **Views** window is displayed. Note the default view showing the **Last 25 Shipment Notices** now includes the created ASN.

- 2- Note the Processing Status Code of Pending for the newly created ASN.
- 3- Click the Return to Shipments: Shipments Notices link.



Cancel Advance Shipment Notices

Nor Reg	rtheast Ohi ional Sewe	District iS	upplier P	Portal	-			C. C. C. C. C. C. C. C. C. C. C. C. C. C	
Home	Orders	Shipments	Finance	Admin					
Delivery	Schedules	Shipmen	t Notices	Shipment Schedule	es Receipts	Returns	Overdue Receipts	On-Time Performance	
Shipm	Shipment Notices								
	Create Advance Shipment Notices Create Advance Shipment Billing Notices								
		Shipment and I Ivance Shipmer	-	-					

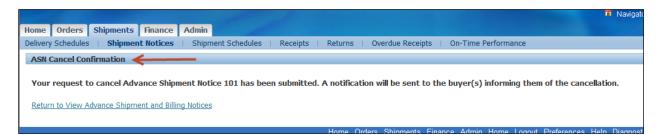
The Shipment Notices window is displayed.

1- Click on the View / Cancel Advance Shipment and Billing Notices link.

							III INAVIGATOR -	Pavonies -	Home Logout Preterence	es Help Diagnostics		
Home	Orders Shipments	Finance Admin										
Delivery	Schedules Shipme	nt Notices Shipment S	chedules Receipts Retur	ns Overdue Recei	ipts On-Time Performance							
Shipme	ents: Shipment Notices	•										
View /	Cancel Advance Shipr	nent Notice										
										Export		
View	s											
View	View Last 25 Shipment Notices • Go											
🗊 Onc	e a shipment notice is ca	ncelled it cannot be undone										
		otice Cancel Shipment N										
Select	Shipment Number	Shipment Date	Expected Receipt Date	Freight Carrier	Waybill/Airbill Number	Supplier Site	Invoice Number	Packing Slip	Processing Status Code	Cancellation Status		
1 0	101	10/18/2013 16:42:20	10/21/2013 16:42:28		FX-3456	01			Pending			
Return	Return to Shipments: Shipment Notices											
				e Orders Shipments	Finance Admin Home Logo	ut Preferences H	lelp Diagnostics					
About th	is Page Privacy State	ment							Copyrig	ht (c) 2006, Oracle. All rights reserved.		

The **Views** window is displayed. Note the default view showing the **Last 25 Shipment Notices** now includes the created ASN.

- 2- Note the **Processing Status Code** of **Pending** for the newly created ASN.
- 3- Click the **Select** button next to the **Shipment Number** to be cancelled.
- 4- Click the Cancel Shipment Notice button.



The **Confirmation** window is displayed.

Note: Once a shipment notice is cancelled, it cannot be undone.

iSupplier Training Guide Northeast Ohio Regional Sewer District Protecting Your Health and Environment

Topic 7: iSupplier Administrative Updates

Registered iSupplier users can maintain updated profile information directly through the portal. Changes to address, contact, product, and business classification information can be submitted for review and approval by NEORSD purchasing administration.

This topic covers:

- Access to the Admin tab for viewing and updating profile information
- Updating supplier address information
- Updating supplier contact information
- Updating supplier product information
- Updating supplier business classification information

Access the Admin Tab

Northeast Oh Regional Sewe	io r District iSupp	lier Portal		
Home Orders	Shipments Fina	ince Admin		
Search PO	Number 👻		Go	

The Home Page is displayed.

1- Click the **Admin** tab.

Home Orders Ship	nents Finance Admin						nanyaw • • •	avunues •	nome cogo	ot Preterences
Profile Management										
General Company Profile Organization Address Book Contact Directory Business	General		Organization Name Supplier Number Alias rent Supplier Name nt Supplier Number		Tax Registra	Taxpayer ID 34	-1792160			
Business Classifications Product & Services Banking Details Payment & Invoicing Surveys	Attachments Search Note that the search is case ins Title B Show More Search Options Add Attachment	ensitive	60							
	Title No results found.	Туре	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish

The **Profile Management** window is displayed. Use this window to update all profile information.



Update Supplier Address

						in Hung		avonteo .	Home Lo	your rieleiences
Home Orders Ship	nents Finance Admin									
Profile Management										
 General Company Profile Organization Address Book 	General	1	ganization Name IND Supplier Number 016 Alias		ODUCTS INC		Tax Registrat	Taxpayer ID 34	-1792160	
 Contact Directory 			nt Supplier Name Supplier Number				Country of Tax I	Registration		
 Business 	Attachments									
Classifications o Product &	Search									
Services Banking Details Payment & Invoicing 	Note that the search is case inse Title <u>Show More Search Options</u>	nsitive	Go							
 Surveys 	Add Attachment									
	Title	Туре І	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish
	No results found.									

1- Click the Address Book link.

Profile Management					
General	Address Book				
Company Profile	Create				
 Organization 	Address Name 🔺	Address Details	Country	Update	Remove
 Address Book 	01	6091 CAREY DR	United States		1
 Contact 		VALLEY VIEW, OH 44125		5	9
Directory					
 Business Classifications 					
 Product & Services 					
 Banking Details 					
 Payment & Invoicing 					
 Surveys 					

The **Address Book** window is displayed. All current addresses for the supplier are listed here.

2- Click the **Update** icon.

Admin: Profile Management: Address Book >		
Update Address		
* Indicates required field		Cancel Save
Supplier Name * Address Hame Country * Address Line 1 Address Line 2 Address Line 2 Address Line 3 Address Line 4 * City/Town/Locality	United States Phone Number 6091 CAREY DR Fax Area Cod Fax Area Cod Fax Number Email Addree VALLEY VIEW Cuyahogal	e 216 r 5240360 e 216 r 5242567
Note		
Note	such as the type of address. This will be visible to other buyers within your organization as well as to the supplier. Also, include brief not	es to buyer about the change when changing address information.
		Cance! <u>S</u> ave

The **Update Address** window is displayed. Use this window to make any changes or additions to address information.

- 3- Enter the value in the **County** field.
- 4- Click the **Save** button.



Confirmation				
Details for your 01 address have be	en modified.			
Address Book				
Address Book				
Address Book Create Address Name -	Address Details	Country	Update	Remove

The **Confirmation** window is displayed.



Update Supplier Contact Information

iSupplier Training

Guide

Home	Orders	Shipment	Finance	Admin								
Profil	e Managen	ent										
• 0	Seneral	Gen	eral									
• (Company Pro				Organization Name Supplier Number	INDUSTRIAL SAFETY PRODUCTS INC 01676	DUNS Number Tax Registration Number					
	Organizatio Address Bo		Alias Taxpayer D 34-1792160 Parent Supplier Name Country of Tax Registration									
	Contact				Parent Supplier Number		Country of Fax Registration					
0	Business	At	tachments									
	Product & rvices	Sea	rch									
0	Banking De	tails Note	Note that the search is case insensitive									
Inv	Payment & oicing		tle now More Sei	arch Option:	Go							
0	Surveys											

1- Click the **Contact Directory** link.

Home Orders Shipments Finance Admin											
Profile Management	rofile Management										
General	Contact Directory : A	Active Contacts									
Company Profile	Create	Create									
 Organization 	First Name	Last Name	Phone Number	Email	Status	User Account	Remove	Addresses	Update		
Address Book	MARK	CASTRO	216 5240360	mcastro@indsaf.com	Change Pending	~	i i		1		
 Contact 											
Directory	Contact Directo	ry : Inactive Contact	5						and the second second		
 Business Classifications 											
 Product & Services 											
 Banking Details 											
 Payment & Invoicing 											
 Surveys 											

The **Contact Directory: Active Contacts** window is displayed. All active contacts for the supplier are listed here.

2- Click the **Update** icon.

Regional Sewer District iSupplier Portal	ñ Navigator 👻 😂 Favorite	s ▼ Home Logout Preferences Diagnostics
Admin: Profile Management: Contact Directory >		
Update Contact		
* Indicates required field		Cance Save
Contact Title	Contact Email	mcastro@indsaf.com
First Name	MARK Phone Area Code	216
Middle Name	Phone Number	5242567
* Last Name	CASTRO Phone Extension	
Job Title	Fax Area Code	216
Department	Shipping - Fax Number	5242567
		Cance! Save

The **Update Contact** window is displayed. Use this window to make any changes or additions to contact information.

- 3- Enter the value in the **Department** field.
- 4- Click the **Save** button.

Contact detai	Is for MARK CASTRO hav	ve been saved								
Contact Directo	ry : Active Contacts									
	ry : Active Contacts									
Contact Directo Create First Name	ry : Active Contacts	Phone Number	Email	Status	User Account	Remove	Addresses	Update		

The **Confirmation** window is displayed. Note the **Status** of **Change Pending** as a result of the update.



Update Products and Services Information

Home Orders Ship	nents Finance Admin									
Profile Management	rofile Management									
General	General									
Company Profile	Organization Name INDUSTRIAL SAFETY PRODUCTS INC DURS Number Suppler Number 01676 Tax Registration Number									
 Organization 	Alias Taxpayer ID 34-1792160									
 Address Book 	Parent Supplier Name Country of Tax Registration									
 Contact Directory 	Parent Supplier Number									
 Business 	Attachments									
Classifications										
 Product &	Search									
 Banking Details 	Note that the search is case insensitive									
 Payment & 	Title Go									
Invoicing o Surveys	⊕ Show More Search Options									

1- Click the **Products & Services** link.

Nome Orders Shipments Finance Admin Profile Profile Profile Profile Profile Profile Company Profile Organization Address Book Contrast Profile Organization Address Book Exelect All Select Nore Contrast Profile Organization Address Book Select Code Products and Services Date Added Approved Select Code Automotive and other Vehicle Parts Oplog/2013 Approved Select All Booli Building Materials Oplog/2013 Approved Select All Select All Select Name Oplog/2013 Approved Select Name /ul>	ostics
Profile Management Products and Services General Products and Services Organization Address Book Select Adl select None Select Adl select None Organization Address Book Select Adl select None Select Adl select None Directory Automotive and other Vehicle Parts 09/09/2013 Business Automotive and other Vehicle Services 09/09/2013 Approved Total	
Company Profile Remove Add O Organization Select Coll Select Coll Select Coll Select Coll Select Coll Variable Organization Select Coll Select Coll Select Coll Select Coll Variable Optional Select Coll Select Coll Select Coll Select Coll Select Coll Variable Optional Approved Variable Optional Approved	
Company Profile Orgenization Select All Select None Select	
Corganization Remove Add • Address Book Select All Select Ione • Contact Select All Select Ione • Contact Select All Select Ione • Contact Automotive and other Vehicle Parts • Buineess Automotive and other Vehicle Services • Automative and other Vehicle Services 09/09/2013 • Automative and other Vehicle Services 09/09/2013	
Select Code Products and Services Date Added Approval Status View Sub-Category Directory AU01 Automotive and other Vehicle Parts 09/09/2013 Approved 7 Disstingers U/L Automotive and other Vehicle Services 09/09/2013 Approved 7	
Directory Image: AU01 Automotive and other Vehicle Parts 09/09/2013 Approved The second se	
Business Classifications Automotive and other Vehicle Services 09/09/2013 Approved Approved	
Classifications Au02 Automotive and other Vehicle Services 09/09/2013 Approved	
Services	
Banking Details	
o Payment & Illivoiding Illivoiding	
anvoluting of the second s	
o surejo	

The **Products & Services** window is displayed. All current **approved** products and services for the supplier are listed.

2- Click the Add button.

Add Products and Services: : (INDUSTRIAL SAFETY PRODUCTS INC)		
	Cance	1 Annha
	Cance	el Apply
Browse All Products & Services		
Search for Specific Product & Service		
		 <u>Next 10</u> ②
	View Sub-	
Code Products and Services		Applicable
AU01 Automotive and other Vehicle Parts		Applicable
AU02 Automotive and other Vehicle Services		Applicable
BD01 Building Materials		Applicable
BL01 Industrial Belts	₩.	Applicable
BM01 Facilities and Building Maintenance		Applicable
BO01 Boiler Parts		Applicable
8002 Boller Services		Applicable
B501 Bearings and Seals		Applicable
CH01 Charts		Applicable
CN01 Construction Services		Applicable
	Previous 1-10	 Next 10 ②

The **Add Products and Services** window is displayed. Use this window to browse through the values, or select the **Search** option for a specific search if desired.

Note: Only **applicable** values are listed or available for search for each supplier.

- 3- Click the checkbox for the desired Applicable value(s).
- 4- Click the **Apply** button.



S Regional Sever District i Supplier Portal		
	🇊 Navigator 🔻 😽 Favorites 👻	Home Logout Preferences Help Diagnostics
Confirmation		
The following Product and Service categories have been added to your profile.		
Facilities and Building Maintenance		
Return to Products and Services		

The **Confirmation** window is displayed.

5- Click the Return to Products and Services link.

Profile Management											
General	Products and Ser	Products and Services									
Company Profile Organization Address Book	Remove Add										
 Contact 	Select Code	Products and Services	Date Added	Approval Status	View Sub-Category						
Directory	AU01	Automotive and other Vehicle Parts	09/09/2013	Approved	놂						
 Business Classifications 	AU02	Automotive and other Vehicle Services	09/09/2013	Approved	گ						
Product &	🖾 BD01	Building Materials	09/09/2013	Approved	₹ 8						
Services	BM01	Facilities and Building Maintenance	10/19/2013	Pending Approval	₹ <u>₹</u>						
 Danking Dataila 											

The Products and Services window is displayed with the added value.

6- Note the **Approval Status** of **Pending Approval** for the added value.





Update Supplier Business Classifications

					Â	Navigator 🔻 🎴 Fa	vorites 🔽	Home Log	out Preferences Diagnostics
Home Orders Ship	nents Finance Admin								
Profile Management									
Profile Management Ceneral Company Profile Organization Address Book Contact Directory Business Classifications Product & Services Banking Details Payment & Invoicing Surveys	General Attachments Search Note that the search is case inser Title Show More Search Options Add Attachment Title	Paren Paren	irganization Name IIIC Supplier Number 01 Allaba ent Supplier Name Supplier Number Go Description	DODUCTS INC	Last Updated	Tax Registrati	axpayer ID 34	-1792160 Delete	Publish to Catalog
	No results found.								

1- Click on the Business Classifications link.

General	Business Classifications											
Company Profile						Cancel Sa						
 Organization 												
 Address Book 	Certification	Certification										
 Contact Directory 												
Business	I certify that I have reviewed the classification	below and they are current	and accurate.									
Classifications	Last Certified By											
 Product & 	✓TIP Date format example: 10/19/2013											
 Services Banking Details 	Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date						
 Payment & 	Caucasian/White Owned											
Payment &	Disadvantaged Business Enterprise											
Invoicing	Diaduvuntugeu Duameaa Enterpriae											
Invoicing	Minority Owned		•									
Invoicing			-									
Invoicing ○ Surveys	Minority Owned		•									
Invoicing	Minority Owned Service-disabled Veteran Owned		•									

The Business Classifications window is displayed.

- 2- Select the appropriate classification. Enter additional certifiying information if known.
- 3- Click the **Certification** checkbox.
- 4- Click the **Save** button.

Business Classifications					
					Cance! Save
Certification					
I certify that I have reviewed the classification below an	d they are current a	nd accurate.			
Last Certified 10/19/2013 By MARK CASTRO					
TIP Date format example: 10/19/2013					
Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
Caucasian/White Owned					
Disadvantaged Business Enterprise					
Minority Owned		· · · · · · · · · · · · · · · · · · ·			
Service-disabled Veteran Owned					
Small Business					
Veteran Owned					
Women Owned					

The Business Classification window is updated with Last Certified information.



Topic 8: Sourcing Supplier Portal

Supplier Access to Sourcing Supplier Portal

Approved supplier users to will be registered at NEORSD for access to this portal.

Registered suppliers will receive valid **UserID** and **Password** login credentials via email from designated NEORSD administrators. The email information will also include the appropriate **link** to the login page for access.

This topic covers:

- Navigation to the Sourcing Supplier Home Page and Review
- Responding to RFQ invitations through online quote creation
- Creating online discussions through portal messaging

Sourcing Supplier Home Page

Regional Sewer District E-Business Suite	The second second		📑 Favorites 🔻	Diagnostics Logout Preferences Help
Enterprise Search All 👻	Go	Search Results Display Preference Standard 🝷		
Oracle Applications Home Page				Logged In As MCASTRO@INDSAF.COM
Main Menu Personalize	Worklist From Type Subject Demmerie, Jennifer Sourcing Publish You are invited: RFO 157	Full List Sent ~ 279 (sdvsdvsdv) 10/21/2013		

The Oracle Applications Home Page is displayed.

Note the **Sourcing Supplier** responsibility listed. This responsibility provides access to the **Home Page** for Sourcing Supplier.

Note the Worklist region of this page. All Invitations for quote responses will be listed here.

1- Click the **Subject** link to view the details of the invitation.





	Northeast C Regional Sev	wer District E-Business Suite				🛱 Navigator 🔻	🗳 Favorites 🔻	Diagnostics Home Logout Prefe	rences Help
Orac	le Applicati	ons Home Page >							
You	are invited	d: RFQ 15279 (sdvsdvsdv) 🛛 🗲 💳							
N N S S T T T	To MCA: Sent 10/2 ID 4081 legotiation (legotiation (supplier IND supplier Site his RFQ is to acknowle	Preview October 08, 2013 08:33 pm Ex Open October 08, 2013 08:33 pm Eas USTRIAL: SAFETY PRODUCTS INC 01 Already in progress. dge your intent to participate, press the <u>Negotiation Details</u> page if you want to	tern Time tern Time 9 Yes button on this page.		o button. You may enter a note to the I	suyer in the space below bel	ore acknowledging or de	sclining.	Yes No
	Action His		1	- L.					
	Num	Action Date 10/21/2013 12:14:36	Action Submit	From Demmerle, Jennifer	To MCASTRO@INDSAF.COM	Details			
	1	10/21/2013 12:14:30	Submit	Demmene, Jennier	MCASTRO@INDSAF.COM				
Re	sponse								
		Note to Buyer				A v			
Retu	rn to Workli	ist 🔶							Yes No

The **Invitation Details** are displayed. Supplier users can respond directly from this screen, or create a separate detailed **quote** for response.

2- Click the **Return to Worklist** link.

Northeast Oh Regional Sewe	io DistrictE-	Business	Suite
Enterprise Search	All	•	
Oracle Application	is Home Pag	e	
Main Menu			
		Per	sonalize
	lier Portal Full ing Supplier ourcing /iew Negotiat Vorklist		

3- Follow the menus **Sourcing Supplier / Sourcing / View Negotiations** link to navigate to the **Negotiations Home Page**.



Northeast Ohio Regional Sewer District	Sourcing									
Negotiations								Navigator '	🔻 😼 Favorites 🔻	н
Search Open Negotiations	Title 🔻	Go								
Welcome, MARK CASTRO.										
Your Active and Draft	Responses	_								
Press Full List to view all ye	our company's responses.									Full List
Response Number	Response Status	Supplier Site	Negotiation Number	Title	Туре	Time Left		Monitor	Unread Message	s
<u>68003</u>	Draft	01	<u>15279</u>	sdvsdvsdv	RFQ	5 days 6 h	ours		<u>0</u>	
Supplier Site		Negotiation Number			Title		Туре	Tin	ne Left	Tun List
Your Company's Open										Full List
No results found.							.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			
Quick Links	-									
Manage	View Responses									
	A									
Drafts										
Drafts Personal Information	<u>Active</u> <u>Disqualified</u>									

The Home Page is displayed.

- 4- Note the information contained in the **Your Active and Draft Responses** region of the page. You will use this region to navigate directly to all of your quote reponses.
- 5- Note the information contained in the **Your Company's Open Invitations** region of the page. All new open invitations for RFQs will be listed here.
- 6- Note the Quick Links region of the page. You will use this region to navigate directly to view Responses by Type (Active/Disqualified/Accepted/Rejected). Use this region to also update Personal Information related to contact information for responses.



Creating a quote response

Registered supplier users can immediately respond to NEORSD bid invitations through the portal. Completed quotes can include notes to buyer, and any attachments that the supplier user wants to add as part of the response. Prior to submission, quote responses can be **validated** to ensure all required information is entered on the response.

				🔒 Navi	gator •	🖌 🙀 Fa	vorites 🔻		Home
legotiations									
earch Open Negotiat	tions Title 🔻		Go						
Velcome, Kristen Lind	dley.								
Your Active and D	raft Responses								
Press Full List to view	all your company's re	sponses.							Full Lis
Response Number	Response Status	Supplier Site	Negotiation Number	Title	Туре	Time Left	Monitor	Unread	Message
10558	Active	02	<u>4391</u>	Lab Supplies	RFQ	0 seconds		0	
10559	Active	02	<u>4393</u>	Lab Supplies	RFQ	0 seconds		<u>0</u>	
10529	Active	02	<u>4372</u>	Solution Buffer	RFQ	0 seconds		<u>0</u>	
10526	Active	02	<u>4363</u>	FORMALDEHYDE	RFQ	0 seconds		<u>0</u>	
10413	Draft	02	<u>4311</u>	Lab Supplies	RFQ	0 seconds		<u>0</u>	
Your Company's O	non Invitations								
rour company s o	pen invitations								Full Lis
Supplier Site	Negotiation N	umber	Title			Туре	Time Le	ft	
	4427 🚽		Laboratory 08	/22/2014		RFQ	2 days 2	3 hours	

Quick Links

All new quote requests are listed in the Your Company's Open Invitations section of the Home Page.

1- Click the link under the Negotiation Number field to access the negotiation (aka RFQ).



Northeast Ohio Regional Sewer District SOL	urcing						
			🏦 Navigator 👻 📮	🛊 Favorites 🔻 🛛 Hor	me Logout Prefe	rences Help I	Diagnostics
Negotiations							
Negotiations >							
RFQ: 4427							
Header Lines Controls	Status	Laboratory 08/22/2014 Active 2 days 23 hours		Open Date	Acknowled 08/22/2014 13 08/25/2014 13		▼ Go
				Outcome Event	Standard Purch	ase Order	
Terms							
Currency		Administration Euclid Ave Administration Euclid Ave		Carrier	UPON RECEIPT C		
	RFQ Currency	USD		Price Precision	Any		
Requirements							
Details Section							
No results found.							
Additional Header Attribute	s (Buyer & Supj	olier)					
Notes and Attachments							
Note to Suppliers							
	Type Descri	ption Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.							

The **Negotiations** window is displayed, showing **summary** information for the RFQ Header. The Header tab may contain attached documents shown at the bottom.

2- Click on the Lines tab to access the lines of the RFQ

Northeast Ohio Regional Sewer District SOL	urcing							
				🔒 Naviga	tor 🔻 🏾 🧕 Favorites 🤻	Home L	ogout Preferences	Help Diagnostics
Negotiations								
Negotiations >								
RFQ: 4427								
						Actions	Acknowledge Partic	ipation 🔻 Go
	Title		08/22/2014					
		Active	ours				22/2014 13:48:47	
	Time Len	2 uays 23 i	louis			Close Date 08/3	25/2014 13:48:03	
Header Lines Controls								
	Display Rank As	s Win/Lose			Cost Fact	tors None		
		Price Only			Price T	iers None		
Lines								
Line	Item, Rev	Category	Unit Quantity	Need-By From	Need-By To	Best Price (USD)	Active Responses	Time Left
1 AQUA 30 0.45 Im FILTER	994734	LB02.LB02003	PK 4	08/29/2014 17:00:00	08/29/2014 17:00:00	Blind	Blind	2 days 23 hours
2 Acetic Acid 5% used fo	994792	LB01.LB01001	EA 12	08/29/2014 17:00:00	08/29/2014 17:00:00	Blind	Blind	2 days 23 hours
TIP IMPORTANT NOTE: To v	iow the comp	lata PEO cont	aining full itom	descriptions download	the printed version	In the above Action	ne how coloct 'Drint	able View' and
then click the GO butto				descriptions download	a the printed version.	In the above Action	is box, select Philo	able view and
Return to Negotiations						Actions	Acknowledge Partic	ipation 🔻 Go
			Negotiations H	ome Logout Preferenc	on Holp Diagnostics			
About this Page Privacy Statem	ent		negolialions n	onic Logodi i Telefeni	Co nep Diagnosiics		Copyright (c) 2008 O	racle. All rights reserve

The RFQ Lines window is displayed, showing all detail lines information for the RFQ.

3- Click on the **Controls** tab to view response rules for the RFQ.



actiations	n Navigator 🔻 💽 Favorites 👻 Home Logout Preferences Help Diagno:
actiations	
egotiations >	
Q: 4427	
	Actions Create Quote
Title Laboratory 08/22/2014 Status Active	
Time Left 2 days 23 hours	Open Date 08/22/2014 13:48:47 Close Date 08/25/2014 13:48:03
leader Lines Controls	
Schedule	
Preview Date	Open Date 08/22/2014 13:48:47
Close Date 08/25/2014 13:48:03	Award Date
Response Rules	
Negotiation is restricted to invited suppliers	
Suppliers are allowed to respond to selected lines	
Suppliers are required to respond with full quantity on each line	
Suppliers are allowed to provide multiple responses	
Buyer may close the negotiation before the Close Date	
Buyer may manually extend the negotiation while it is open	
	nload the printed version. In the above Actions box, select 'Printable View' and then click the

The **Controls** window is displayed, listing the **Schedule** information and all valid **Response Rules** established by NEORSD for the RFQ.

- 4- Review the information in this window.
- 5- To initiate the creation of the quote response, select the **Create Quote** value in the **Actions** box.
- 6- Click the **Go** button.

Northeast Ohio Regional Sewer District	Sourcing				📅 Navigator 🔻 📓 Favorites 🔻	Home Log	pout Preferences Help D)iagnostics
Negotiations								
Negotiations > RFQ: 152	79 >							
Create Quote: 68003 (RFQ	15279)							
Header Lines	Title	<u>sdvsdvsdv</u>			Cancel View RF Time Left 5 days 6 hou Close Date 10/26/2013	s	eadsheet Save Dra	ft <u>C</u> ontinue
		USD			Quote Valid Until Reference Number Note to Buyer	I3)		
Attachments								
Add Attachment								
Title	Туре	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								
					Cance! View RF	Quote By Spr	eadsheet Save Dra	ft <u>C</u> ontinue

The **Create Quote** window is displayed. The window defaults to the **Header** area of the quote.

7- Use the **Calendar** icon to enter the appropriate value for the **Quote Valid Until** date.



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	http://eprocapp4.neorsd.com:8020/OA_HTML/cabo,											
ſ	0)	ctober	•	201	3		• >					
I	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
I	29	30	1	2	3	4	5					
	6	7	8	9	10	11	12					
	13	14	15	16	17	18	19					
	20	21	22	23	24	25	26					
	27	28	29	30	31	1	2					
						Car	nce <u>l</u>					
	😜 Int	ternet	Prote	cted M	ode: O	n∣∢	a •	🔍 100%	6 • .			

The **Calendar** window is displayed.

8- Select the appropriate **Day** value.

Northeast Ohio Regional Sewer District	Sourcing	-			🏦 Navigator 👻 📑 Favorites 🔻	Home Log	out Preferences Help I	Diagnostics
Negotiations								
Negotiations > RFQ: 15279	>							
Create Quote: 68003 (RFQ 15	(279)							
Header Lines	Title <u>solv</u>	<u>sdvsdv</u>			Cancel View R Time Left 5 days 6 hou Close Date 10/26/2013	urs	eadsheet Save Dra	aft <u>C</u> ontinue
))	DUCTS INC ALLEY VIEW, OH 44125, US		Quote Valid Until 10/30/2013 A Reference Number 10/1/ Note to Buyer	(012)		
Attachments								
Add Attachment								
Title	Туре	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								
					Cance! View R	FQ Quote By Spr	eadsheet Save Dra	aft Continue

- 9- Enter the value for the **Reference Number** of the quote response.
- 10- If desired, enter a **Note to Buyer** (up to 240 characters) in the designated field. Use this field to advise estimated freight costs.
- 11- Click the Lines tab.

Northeast Ohio Regional Sewer District So	urcing						🉃 Navigator 👻 🗣	🖥 Favorites 🕶 Hon	ne Logout Preferences Help Diagnostics
Negotiations >									
Create Quote: 68003 (RFQ 1527	9)								
Header Lines		Title <u>sdvsdvsdv</u>						View RFQ Quote 5 days 6 hours 10/26/2013 19:34:20	By Spreadsheet Save Draft Continue
RFQ Currency USD Price Precision Any						Quote Currency	USD		
Line	Update	Ship-To	Rank	Start Price	Best Price	Target Price	Quote Price Unit	Target Quantity	Quote Quantity Promised Date
1 ifohyewiuyfhiuweh	1	Easterly Internal Location	Blind		No Quote		> 31 EA	1	1 11/02/2013 🔤
Indicates more information requested. Click the Update icon. Cancel View RFQ Quote By Spreadsheet Save Draft Continue									
				Negotiations	Home Logout Pri	eferences Help Diagr			

The **Lines** window is displayed.

- 12- Enter the Quote Price and Promised Date for each line.
- 13- When complete, click the **Continue** button.



Terels Carlos 68003: Review and Submit (EFQ 15279) Create Carlos 68003: Review and Submit (EFQ 15279) Haader Title schwichoode Carlos 0003: Review and Submit (EFQ 15279) Title schwichoode Carlos 0003: Review and Submit (EFQ 15279) Reference Number SQU01F456 Reference Number SQU									
Create Cupice Reads Cupice Stat	Negotiations								
Image: Cancel Back Validate Save Draft Printable View Saught Header Time Left 5 days 6 hours Conce Date 10/6/013 19:33-32:00 Conce Date 10/6/013 19:33-32:00 Supplier Note To Back Validate Supplier Note To Back Validate	Negotiations >								
Image: Strate S	Create Quote 68003: Review a	and Submit (RFQ 15279)							
Image: Strate S						Cancel Back	Validate Save	Draft Printable	View Submit
Title sdvsdvsdv Suppler Site Site Svsdvsdvsdv Stoppler Site Site Svsdvsdvsdv Stop Site Svsdvsdvsdv Stop Site Site Svsdvsdvsdv Stop Site Site Svsdvsdvsdv Stop Site Site Site Site Site Site Site Site						cuncci		Thirdbic	oubilite
Supplier Buld Supplier Singlicer Singli	Header								
Type Description Category Last Updated By Last Updated Usage Update Delete Oresults found. Lines Select Line Ship-To Best Price Star Price Total (USD) 31.0- Select Line Star Total (USD) 31.0- Select Line Ship-To Best Price Best Price Total (USD) 31.0- Select Line Star Total (USD) 31.0- Total Update Marked-By Date Promised Date Total (USD) 31.0- Select Line Star Total (USD) 31.0- Total (USD) 31.0- Select Line Star Total (USD) 31.0- Total (USD) 31.0- Select Line Star Total (USD) 31.0- Total (USD) 31.0- Select Line Star Total (USD) 31.0- Total (USD) 31.0- Select Line Star Total (USD) 31.0- Total (USD) 31.0- Select Line Star Total (USD) 31.0- Total (USD) 31.0- Select Line Star Total (USD) 31.0- Total (USD) 31.0- Select Line Star Total (USD) 31.0- Total (USD) 31.0- Select Line Li Schwein/Shuwe		Supplier INDU: Supplier Site 01 RFQ Currency USD Quote Currency USD				Close Date 10/26/201 Quote Valid Until 10/30/201 Reference Number ISQUOTE45	3 19:34:20 3		
No results found. No	Attachments								
No results found. Indexteril in the second seco	-	-							
Lines Select Line Ship-To Best Price Start Price Target Price Quote Price Quote Price Quote Quantity Line Total Need-By Date Promised Date Inforwer/ur/fhuweh.me Easterly Internal Location No Quote 31 EA 1 31.0010/30/2013 17:00:00 to 10/30/2013 17:00:00 11/02/2013 12:29:32 Line 1: if ohyewinyfhluweh.me/finewehfineehfi		туре	Description	category	Last opdated by	Last opdated	usage	opdate	Delete
Select Line Ship-To Best Price Start Price Target Price Quote Price (USD) Unit Target Quantity Line Total Reed-By Date Promised Date Inforwaru/filuwel Estarty International Location No Quote Price (USD) Unit Target Quantity Line Total Reed-By Date Promised Date International Location No Quote 31 EA 1 1 31.0010/30/2013 17:00:00 to 10/30/2013 17:00:00 11/02/2013 12:29:32 International Location Setarty Setarty Setarty Setarty Setarty In/02/2013 17:00:00 to 10/30/2013 17:00:00 to 10/30/2013 17:00:00 In/02/2013 12:29:32 Note to Buyer Setarty Setarty Setarty Setarty Setarty Setarty Setarty No to Buyer Setarty Setarty Setarty Setarty Setarty Setarty Set	Lines								
Independent/Internal Location No Quote 31 EA 1 31.0010/33/2013 17:00:00 to 10/30/2013 17:00:00 11/02/2013 12:29:32 Line 1: if obyewing/fileweeh/fil			Quote 1	Total (USD) 31.00					
Ine 1: ifohyewinythiwwehofhewjolihowehfhweofhqwehfiqewhfiqheiofhqohfoqhofhoqhofhoqhofhwqoe Notes Note to Buyer Attachments Title Type Description Category Last Updated By Last Updated Usage Update Delete	Select Line	Ship-To	Best Price Start Price	Target Price Quote	Price (USD) Unit Target Quantity	Quote Quantity Line Total Need-By	y Date	Pro	mised Date
Notes Note to Buyer Attachments Title Type Description Category Last Updated By Last Updated Usage Update Delete	I ifohyewiuyfhiuweh	Easterly Internal Location	No Quote		31 EA 1	1 31.00 10/30/20	013 17:00:00 to 10/30/2013	3 17:00:00 11/	02/2013 12:29:32
Note to Buyer Attachments Title Type Description Category Last Updated By Last Updated Usage Update Delete	Line 1: ifohyewiuyfhiuweho	fhewjoifhowehfiwehfhw	eofhqwehfiqewhfiqheiofhqohf	oqehfoqhofhoqhfoqhoft	тидое				
Attachments TRIe Type Description Category Last Updated By Last Updated Usage Update Delete	Notes								
Title Type Description Category Last Updated By Last Updated Usage Update Delete	Note to Buyer								
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	Title	Type	Description	Category	Last Indated By	Last Undated	licano	Undate	Delete
	No results found.	Type	beschpton	cucegory	case optimeed by	cuse opulated	osuge	opuate	Derete

The **Review and Submit** window is displayed.

14- Use the **Validate** button to initiate pre-validation of the quote to ensure all required information has been entered prior to submission.

Note: At any point in quote creation, the user can click the **Save Draft** button prior to submission, and return to the quote to continue creation in another session.

Regoliations	📅 Navigator 👻 📑 Favorites 👻	Home Logout Preferences Help Diagnostics
Negotiations >		
Confirmation Quote 68003 for RFQ 15279 (sdvsdvsdv) has been validated without any errors.		
Create Quote 68003: Review and Submit (RFQ 15279)		N N
	Cancel Back Va	alidate Save Draft Printable View Sub <u>m</u> it

The **Confirmation** window is displayed to indicate validation with no errors.

15- Click the **Submit** button.

Northeast Ohio	Sourcing	-	
Negotiations			
Quote 68003 for RFQ 15279	(sdvsdvsdv) has been submitted.		
Return to Sourcing Home Pag			

The **Confirmation** window is displayed to confirm successful submission of the quote.

16- Click the Return to Sourcing Home Page link.



Creating Online Discussions

Portal supplier users can utilize the **messaging** capabilities to communicate directly with NEORSD purchasing administrators with questions or requests for more information during negotiations. Users will receive updates when message responses are received from NEORSD personnel.

Northeast Ohio	Sourcing	-					🛱 Navigator 🗸	😼 Favorites 🔻	Home
Negotiations									
Search Open Negotiations	Title 👻	Go							
Welcome, MARK CASTRO.									
Your Active and Draft R	lesponses								
Press Full List to view all you	r company's responses.								Full List
Response Number	Response Status	Supplier Site	Negotiation Number	Title	Туре	Time Left	Monitor	Unread Message	s
68003	Active	01	<u>15279</u>	sdvsdvsdv	RFQ	5 days 6 hours		<u>0</u>	
Your Company's Open In	nvitations								
									Full List
Supplier Site		Negotiation Number			Title	Туре	e Time	e Left	
No results found.									
Quick Links									

All active quote responses are listed in the Your Active and Draft Responses section of the Home Page.

1- Click the **link** under the **Response Number** field to open the response.

Negotiations						le			
Negotiations >									
Quote: 68003 (RFQ 15279)									
Title <u>stvstvstv</u> Time Left 5 days 5 hours Quote Style Bind Quote Currency USD Contact CASTRO, MARK SupplerS Quote Number ISQUOTE456 Quote Status Active Note to Buyer Title Type Description Category Last Updated Usage Update Delete Attochments No results found.					Ran	king Price O plier INDUST Site 01	RIAL SAFETY PRODUCTS INC	Actions Online Di Online Di View Quo Create Qu Printable	scussions te History Jote
Lines									
✓TIP All prices are in USD. Quote Total (USD) 31.00									
Show All Details Hide All Details									
Details Line	Ship-To	Rank	Start Price	Target Price	Quote Price Unit	Target Quantity	Quote Quantity Need-By Date	Promised Date	Line Active Total Quotes
Show 1 fohyewiuyfhiuwehofhewjoifhowehfiwehfhweofhqwehfiqewhfiqheiofhqohfoqehfoqhofhoqhfoqhofhwqoe	Easterly Internal Location	Blind			31 EA	1	1 10/30/2013 17:00:00 t 10/30/2013 17:00:00	0 11/02/2013 12:29:32	31.00 Blind

The **Quote** window is displayed.

- 2- To initiate the creation of a discussion, select the Create Discussion value in the Actions box.
- 3- Click the **Go** button.



Regional Sewer District Sourcing			🏛 Navigator 🔻 😼 Favorites 🔻	Home Logout Prefer	rences Help Diagnostics
Negotiations					
Negotiations > Quote: 68003 (RFQ 15279) >					
Online Discussions (RFQ 15279)					
Title sdysdysdy					Cancel Printable Page
Status Active Time Left 5 days 5				08/2013 20:33:48 26/2013 19:34:20	
Messages					
New Message					
Subject	Message	Status	Sender	Date	Reply
No results found.					
					Cancel Printable Page

The **Online Discussions** window is displayed. Any previous messages or replies related to this quote will be listed in the **Messages** region of the window.

4- Click the **New Message** button.

Regional Sewer District Sourcing		🏛 Navigator 👻 🛤 Favorites 👻	Home Logout Preferences Help Diagnostics
Negotiations > Quote: 68003 (RFQ 15279) >	Online Discussions (RFQ 15279) >		
Create New Message (RFQ 15279)			
* Indicates required field			Cance! Send
	North East Ohio Regional Sewer District Question on RFQ 15279		
> * Message	Quession on KrQ 152/9 Will three be additional items added to this RFQ prior to 10/30/2013? A Thank you in advance for your response.		
	Newtyters Deve Level Defense		Cance! Send

The **Create New Message** window is displayed. The **Send To** is pre-populated with the appropriate NEORSD recipient address.

- 5- Enter the desired value in the **Subject** field.
- 6- Enter the desired text (up to 240 characters) in the **Message** field (scrolling field).
- 7- Click the **Send** button.

				ingator · · · · · avontes ·	nome Logout Freit	erences nelp Dia	ignostics
Negotiations							
Negotiations > Quote: 68003 (RFQ 15279) >							
Online Discussions (RFQ 15279)							
						Cancel	Printable Page
	Title <u>sdysdysdy</u> Status Active Time Left 5 days 5 hours				08/2013 20:33:48 26/2013 19:34:20		
Messages 🔶							
New Message							
Subject 🔺	Message		Status	Sender	Date		Reply
Question on RFQ 15279	Will there be additional items added to this RFQ p		Read	CASTRO, MARK	10/21/2013 13:41:09		œ,
						Cancel	Printable Page
		Negotiations Home Logout Preferences Help Diag	nostics				

The Create New Message window is closed and user is returned to the Online Discussions window.

8- Note the inclusion of the new discussion record under the **Messages** region of the window.



							Navigator •	- I avointes	FIOTHE L
Negotiations									
Search Open Negotiations	Title 👻	Go							
Welcome, MARK CASTRO.							×		
Your Active and Draft	Responses								
Press Full List to view all y	our company's responses.							Full Li	ist
Response Number	Response Status	Supplier Site	Negotiation Number	Title	Туре	Time Left	Monitor	Unread Messages	
<u>68003</u>	Active	01	<u>15279</u>	sdvsdvsdv	RFQ	5 days 5 hours		0	
Your Company's Open	Invitations								
								Full Li	ist
Supplier Site		Negotiation Number	er		Title	Туре	Time	e Left	
No results found.									
Quick Links									
									_
Manage	View Responses								
Drafts	<u>Active</u>								
Personal Information	Disgualified								
	Awarded								
	Rejected								

The message has now been sent directly to NEORSD purchasing administration.

9- Note the **Unread Messages** column in the **Your Active and Draft Responses** section of the **Home Page** window – any reply to your message will display an update to the **link** in this column.



Summary

Congratulations! You have now learned how to:

- Access the iSupplier portal and Home Page
- Use the Orders tab and related functions
- Use the Shipments tab and related functions
- Use the Finance tab and related functions
- Create and submit invoices
- Create and submit Advanced Shipment Notices
- Perform profile updates through the Admin tab
- Use the Sourcing responsibility to respond to bid requests and communicate directly with NEORSD purchasing administrators