

Supplier Creation in R12: New User Interface, Richer Functionality

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Introduction

Supplier Creation and Maintenance has undergone a significant makeover in Release 12 of Oracle E-Business Suite. A new look HTML user interface replaces the erstwhile forms based entity. Supplier information is organized differently in order to facilitate a tighter integration with other modules like e-tax, iSupplier portal, Oracle survey. This “new bottle” now also contains a “new supplier entity” included under the trading community architecture (TCA). By representing suppliers as part of the trading community, the entity now has access to powerful features of TCA like integrated enrichment capabilities, relationship management, data librarian functions etc. This whitepaper looks into the new user interface and enhanced features available for supplier entry and maintenance in R12. It also attempts to provide an introduction to TCA and examine the benefits of inclusion of suppliers into this architecture.

Supplier Creation: The “Makeover” of the User Interface

The supplier entry screen in Oracle Payables is used to record information about individuals and Organizations from whom the organization purchases goods and services. It is also used to setup employees as suppliers in order to reimburse expense reports. The user interface for supplier entry and maintenance has changed to a HTML page in Release 12 from a forms based entity in 11i.

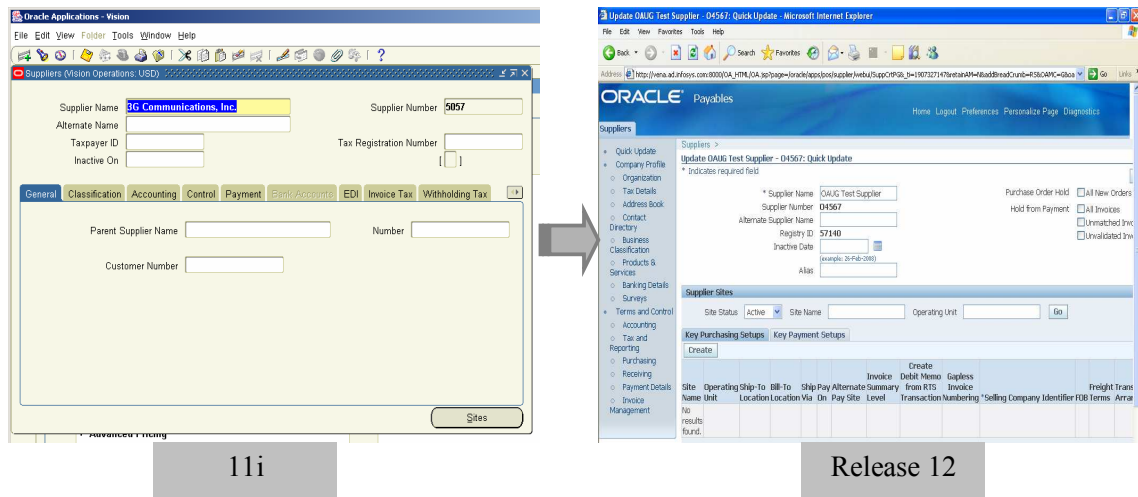


Exhibit I

Main Supplier Page

The main supplier page in Release 12 is organized into three distinct sections

- A. Basic and Advanced search to identify if a supplier record already exists in the system, prior to creating a new entry. The search can be personalized to suit the user’s preference.
- B. Access to the create suppliers page to enter new suppliers or enter employees as suppliers.
- C. A To Do List used to review the change requests submitted by suppliers to their profile information from iSupplier Portal

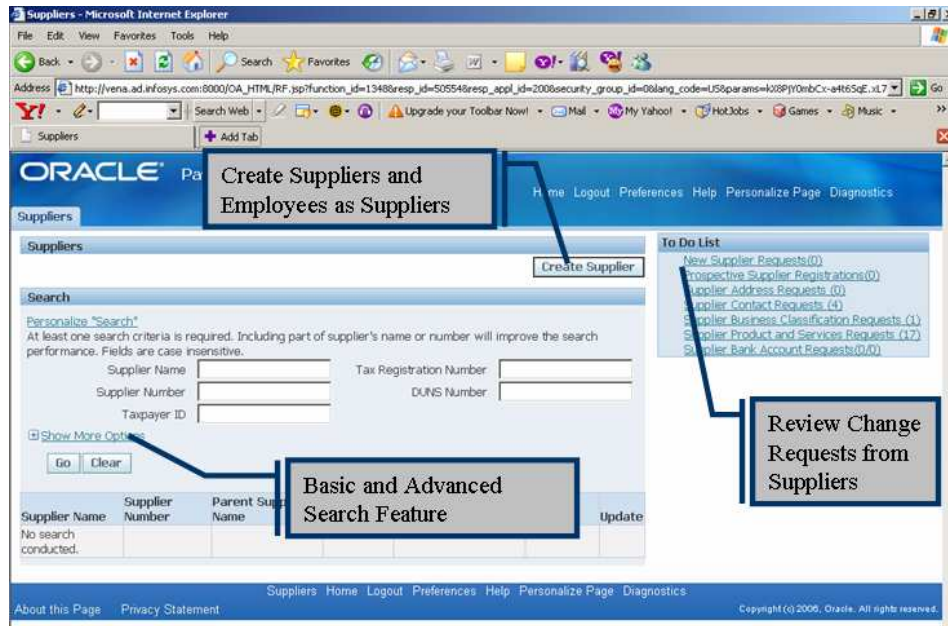


Exhibit II

Supplier Creation: Quick Create

The supplier creation process in Release 12 starts with a quick create page, where basic information can be provided based on the supplier type. The selection of the supplier type is the first step of the process and the user interface changes depending on whether a Standard Supplier is being created or a Supplier is being created to process expense payments for internal employees. This is feature ensures that more tailored information is captured based on the Supplier Type. In 11i, the Supplier Type was a part of the Classification information and included both employees and external supplier related values. The information capture was also similar for both supplier types.

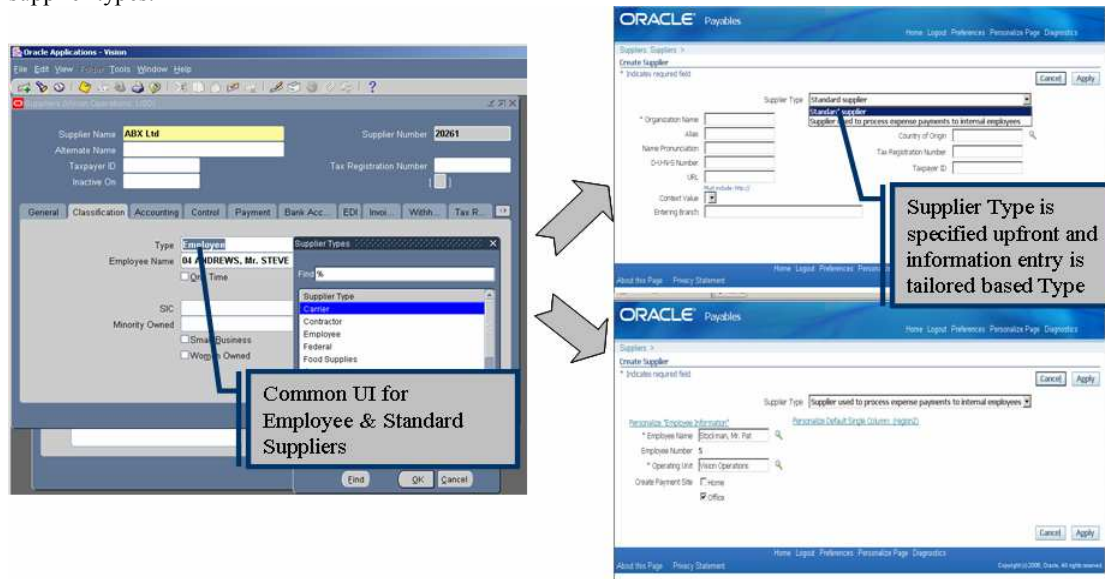


Exhibit III

Supplier Entity: Quick Update Page

Release 12 provides a quick update page which is the default page when supplier profile level information is accessed. The quick update is intended to provide access to key information required to maintain the supplier profile. The page provides access to the supplier level hold information and also the key purchasing and payment attributes to be maintained at a site level. The Quick update page can be personalized so that different sets of users can tailor the information required to be entered by them for profile maintenance.

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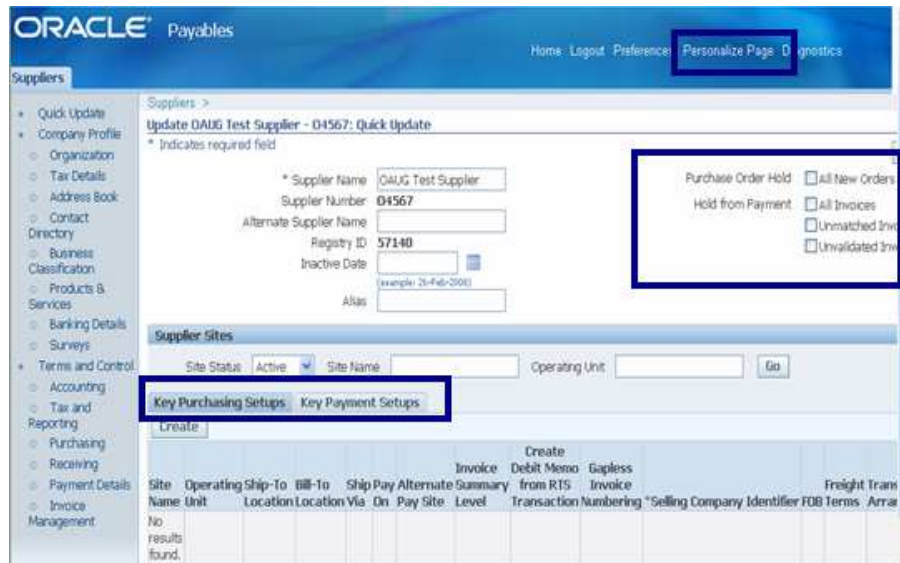


Exhibit IV

Supplier Profile Maintenance

Supplier profile level details are organized into two main sections in Release 12—Company Profile and Terms & Controls for the business relationship with the supplier.

- A. Company Profile: The company profile section contains the key information of the supplier organization and their type of business. The information is structured in such a manner that there can be a tight integration with supplier facing applications like iSupplier Portal. The same categories of information are available in iSupplier Portal and can be updated by supplier contacts. The updates made from iSupplier Portal go through a change request process and require approval from an internal administrator. The categories of information captured as part of the company profile are:
 - o Organization
 - o Tax information
 - o Address Book
 - o Contact Directory
 - o Business Classification
 - o Products and Services
 - o Banking Details
 - o Surveys
- B. Term and Controls: The terms and controls section captures all the attributes of the business relationship with the supplier. Some of these attributes can be personalized for quick update. The categories of information captured as part of terms and controls are:
 - o Accounting
 - o Tax and Reporting
 - o Purchasing
 - o Receiving
 - o Payment Details
 - o Invoice Management

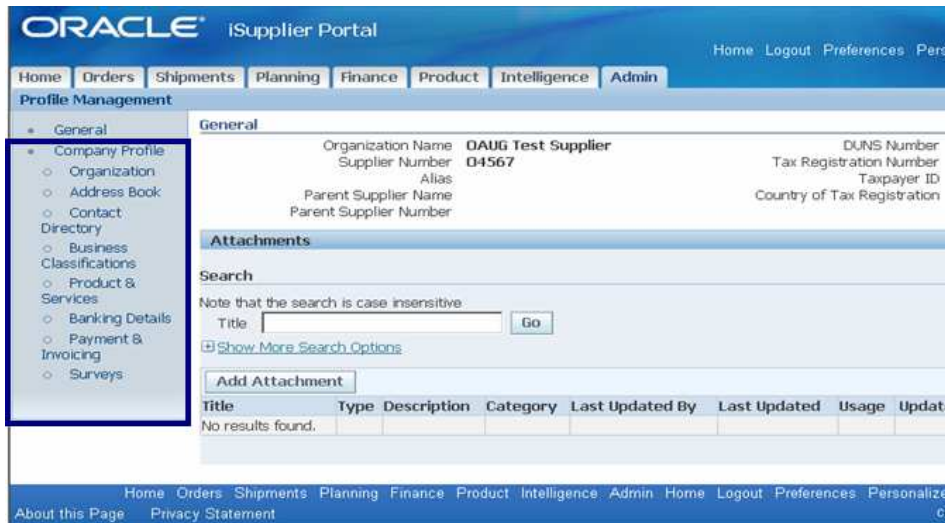
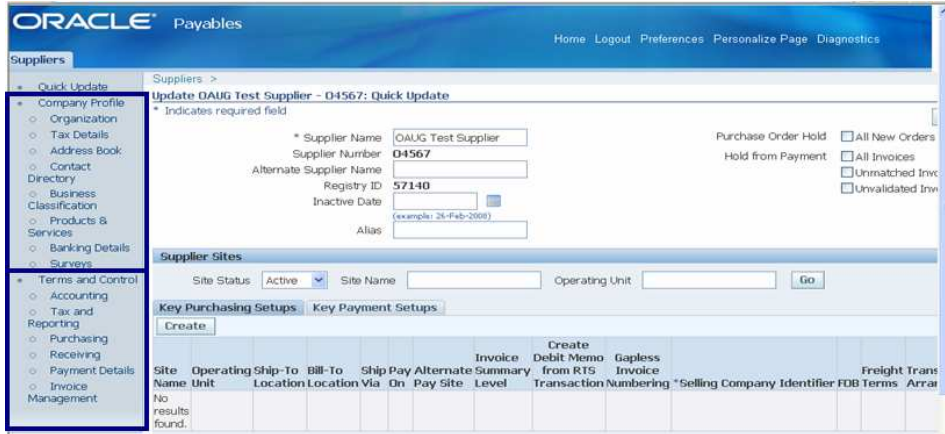


Exhibit V

Supplier Attribute Maintenance

Creation and maintenance of supplier site and site level attributes has also undergone a change in Release 12. Attributes that are available at both the supplier and supplier site level can now be maintained from a single page. This streamlines supplier attribute maintenance and provides better ease of use.

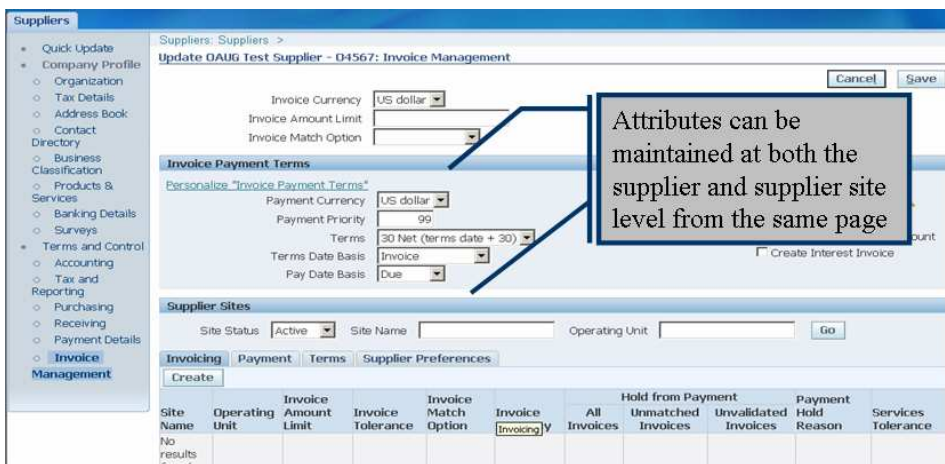


Exhibit VI

Supplier Maintenance in R12: How is it functionally different?

The previous section covered the main user interface related upgrades for Supplier Creation in R12. In addition to UI changes, R12 also provides enhanced data capture functionality thus facilitating better supplier profile management. Most of the enhancements pertain to maintenance of company profile information which is now more tightly integrated with modules like iSupplier Portal and e-Tax. A summary of the functionality enhancements in Company Profile and Term & Controls maintenance is provided below:

Entity Name	Change from 11i
Company Profile Information	
Organization Page	Enhanced Feature
Tax Details	Enhanced Feature
Address Book	Enhanced Feature
Contact Directory	Enhanced Feature
Business Classification	Enhanced Feature
Products & Services	New Feature
Banking Details	Enhanced Feature
Survey	New Feature
Terms & Controls	
Accounting	No Change
Tax and Reporting	Enhanced Feature
Purchasing	No Change
Receiving	No Change
Payment Details	Enhanced Feature
Invoice Management	Unchanged

Organization Page

The organization page has been enhanced in Release 12 to document high level company information pertaining to Organization Details (Legal Structure, Chief Executive Name etc.), Total Employee Details and Tax & Financial Information. This information can either be imported from third party sources like Dun & Bradstreet or can be entered manually by supplier contacts from iSupplier Portal.

Suppliers: Suppliers >
Update DAUG Test Supplier - 04567: Organization
 * Indicates required field

* Supplier Name DAUG Test Supplier
 * Supplier Number 04567
 Alternate Supplier Name
 SIC
 National Insurance Number AZ12309
 Type

Parent Supplier Name
 Parent Supplier Number
 Customer Number
 One Time
 Inactive Date (example: 26-Feb-2008)

Global Details
 Context Value

Additional Information
 * Context
 Supplier Home Page

Organization
 D-U-N-S Number
 Legal Structure Association with Shares
 Principal Name
 Year Established
 Chief Executive Name Craig Lundie
 Chief Executive Title Mr.
 Principal Title

Control Year
 Mission Statement

Total Employees
 Organization Total
 Organization Total Type
 Corporate Total
 Corporate Total Type

Tax and Financial Information
 Taxpayer ID
 Tax Registration Num
 Fiscal Year End
 Federal Agency
 Analysis Year
 Currency Preference
 Annual Revenue
 Potential Revenue
 For next fiscal year.

Attachments
 Search
 Note that the search is case insensitive
 Title
 Go
[Show More Search Options](#)
 Add Attachment

Exhibit VII

Tax Details

The tax details page integrates with e-tax and is used to provide tax information for invoices. Transaction tax level details (default controls, tax registrations, associated fiscal classifications etc.) and withholding applicability can be maintained at a supplier and supplier site level.

Suppliers: Suppliers >
Update DAUG Test Supplier - 04567: Tax Details

Income Tax
 Taxpayer ID
 Reportable Federal State
 Allow Withholding Tax

Transaction Tax

Default Controls
 Update the values that default to all invoices and tax registration records of this party or party site.
 Rounding Level Header Set Invoice Values as Tax Inclusive
 Rounding Rule Up

Tax Registrations
 Default Reporting Country Name
 Default Reporting Registration Number
 Default Reporting Tax Registration Type

Create

Regime Code	Tax Jurisdiction Code	Registration Number	Issuing Tax Authority	Active	Update	Remove
No results found.						

Exhibit VIII

Address Book

Supplier location details can be maintained as part of the address book in Release 12. Existing addresses can be queried/updated or new addresses can be created. The addresses can be converted into supplier sites for multiple operating units and separate names can be given to different sites for the same address. All the sites pertaining to the operating units in the user's MOAC profile are visible and can be updated.

Supplier Locations can be created/updated as addresses in the Address Book

→ Supplier Sites can be created for multiple operating units
 → Operating Units which are part of the MOAC profile are visible

Operating Unit	Operating Unit Name
<input checked="" type="checkbox"/>	Vizion Germany
<input checked="" type="checkbox"/>	Vizion Greece
<input checked="" type="checkbox"/>	Vizion Health Services
<input checked="" type="checkbox"/>	Vizion Hungary
<input checked="" type="checkbox"/>	Vizion India Hyderabad
<input checked="" type="checkbox"/>	Vizion India Mumbai
<input checked="" type="checkbox"/>	Vizion Indonesia
<input checked="" type="checkbox"/>	Vizion Italy
<input checked="" type="checkbox"/>	Vizion Korea
<input checked="" type="checkbox"/>	Vizion Lebanon
<input checked="" type="checkbox"/>	Vizion Netherlands
<input checked="" type="checkbox"/>	Vizion Norway

Exhibit IX

Supplier Locations can be added / updated by supplier or supplier contacts using iSupplier Portal. Addresses that are added from iSupplier Portal get created with a status of “New” whereas updated addresses are in a “Change Pending” status. Changes made from iSupplier Portal go through the change request process and need to be approved by an internal administrator. In case of updates, the change history is displayed to the internal administrator and the changes can then be approved. For “new” addresses, the internal administrator can verify the addresses and create supplier sites for operating units in his/her MOAC profile. Once an address is approved, its status changes to “current”.

Details Name	Address	Country	Communication Purpose	Status	Update	Manage Sites	Ren
DAIG Address 1	#221, Liang Court, Harlow, Essex, United Kingdom	United Kingdom		Change Pending			
DAIG Address 2	#45 Melville Park, Harlow, Essex, United Kingdom	United Kingdom	Payment, Purchasing	New			

Exhibit X

Contacts Directory

The contacts directory page can be used to create/update contacts at a supplier level in Release12. User Accounts can be created for the contact and responsibilities can be assigned to the user account from the same page. User access restrictions can be setup so that site modification and contact modification access can be controlled.

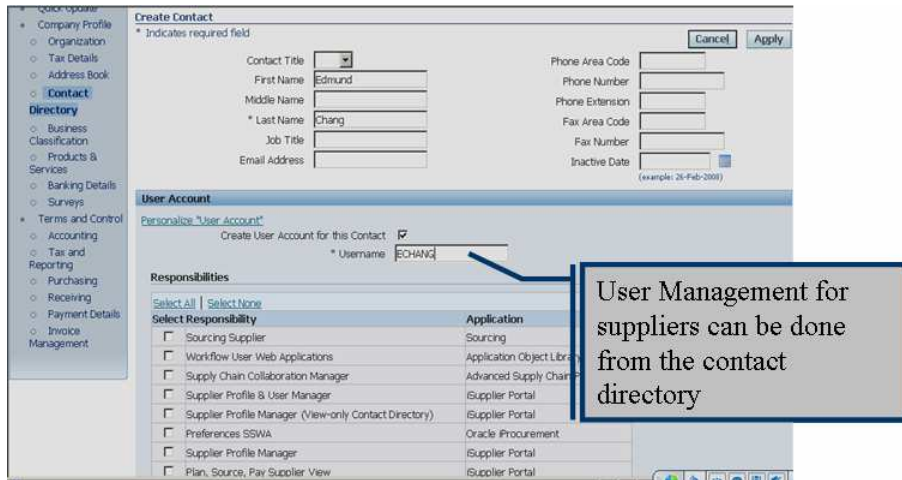


Exhibit XI

Supplier contacts can also be added or modified from iSupplier Portal and go through a change request process. The contact status is either in “New” or “Change Pending” and needs to be approved by an internal administrator before it becomes a “Current” contact. The process is very similar to the functionality available for address book updates.

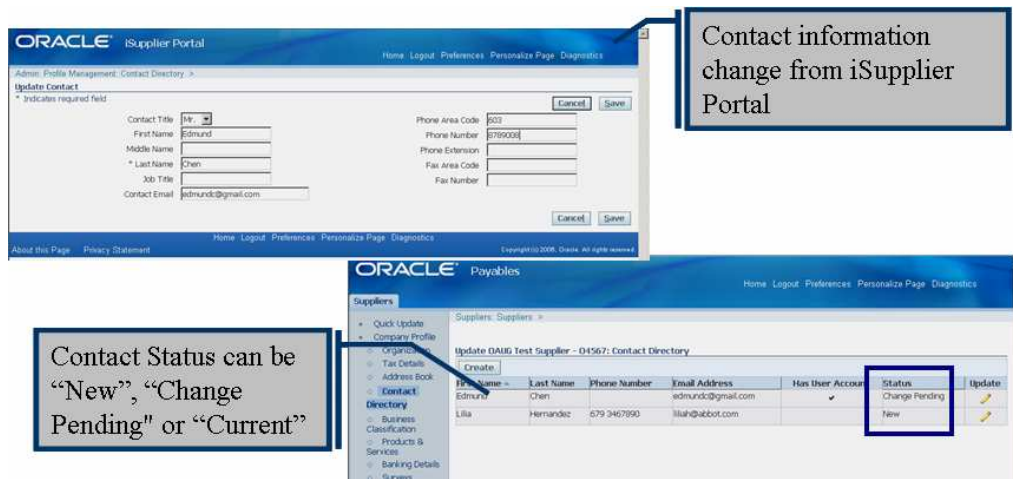


Exhibit XII

Business Classifications

The business classifications page captures the classification of business activity of the suppliers. These may be required as per governmental regulations or may be used for reporting purposes. In Release 12, the business classifications page is more tightly integrated with iSupplier Portal. Suppliers can enter more detailed information on the classification of their business and the business classification is created in a “pending” status.



Exhibit XIII

Business classifications created/updated by suppliers initiates a change request process so that a buyer/internal administrator can approve the classification. The business classification status changes to “approved after that.

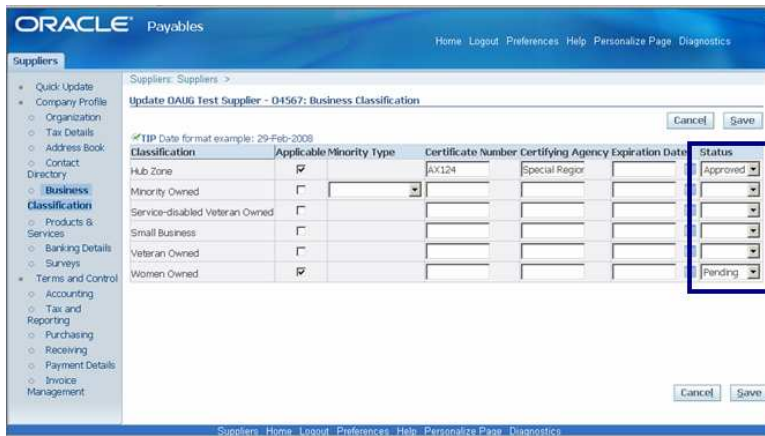
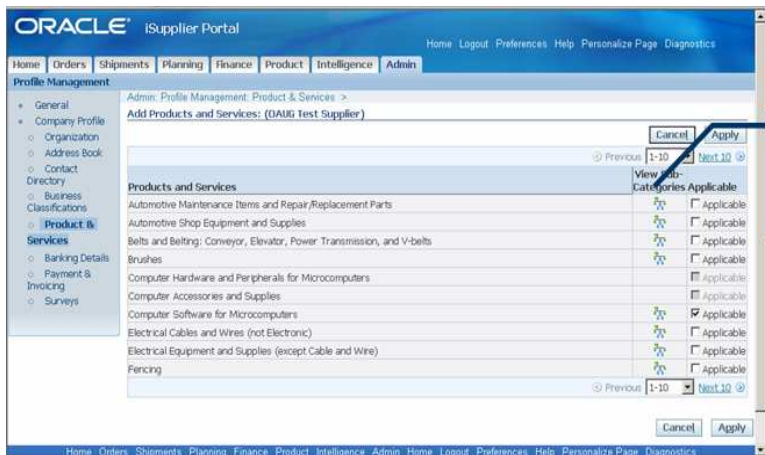


Exhibit XIV

Products and Services

The category of products & services provided by the supplier are maintained in the Product & Services page in Release 12. This information helps buying organizations to generate the invitation lists for RFQs and also generate reports. The parent and child product categories can be assigned at a supplier header level. The product and service assignment is very tightly integrated with iSupplier Portal and suppliers can enter the categories of products sold by them.



Category/Sub-Category of Product/Services can be entered from iSupplier Portal

Exhibit XV

The categories claimed by the supplier are created in a “Pending” Status and would initiate an approval process by a buyer administrator.

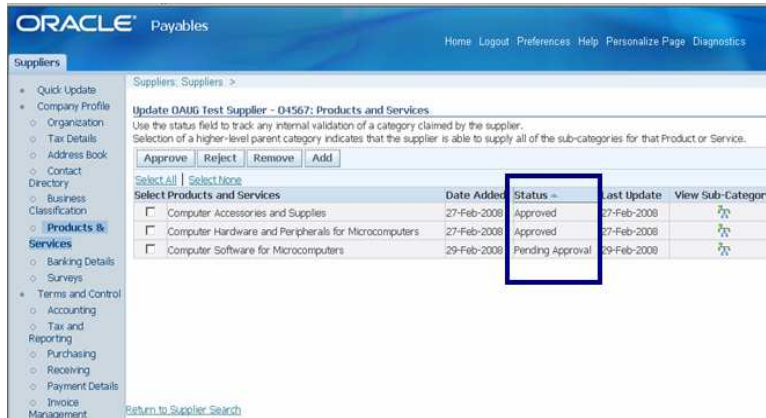


Exhibit XVI

Banking Details

In Release 12, bank accounts can be assigned at the following four levels:

1. Supplier
2. Site
3. Address
4. Address-Operating Unit

New accounts can be created using existing bank and branch details or new bank/branches can also be entered.

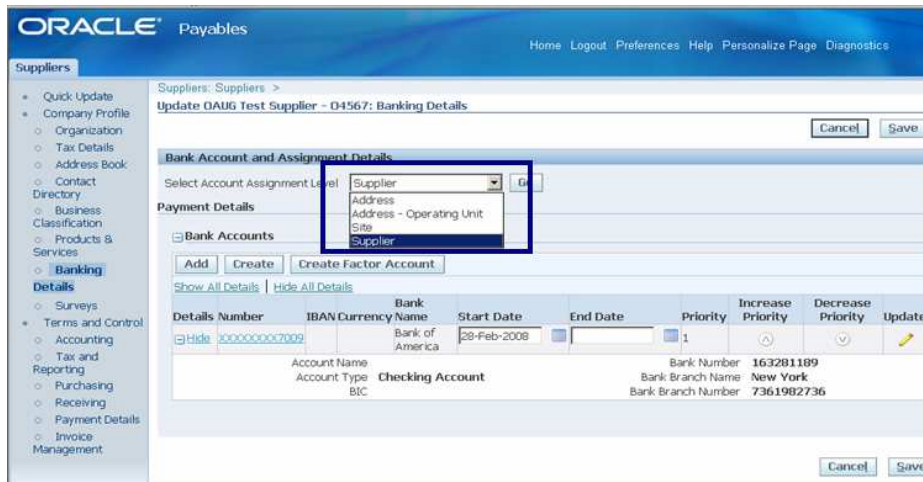


Exhibit XVII

The bank accounts for a supplier can also be setup from iSupplier portal and this initiates a change request process. The buyer administrator is notified of the bank account addition in the "To-Do List" and can either approve the account, verify the account or reject the account assignment.

Exhibit XVIII

Survey Details

Release 12 provides a new Survey Page through which custom surveys can be assigned to suppliers to gather supplier feedback. The supplier feedback can be gathered when the supplier contact logs through applications like iSupplier Portal.

Subject	Last Update By	Last Update Date	Update
B2C Product Intro			
List Based Product Shipment Survey			

	Very Dissatisfied	Dissatisfied	Neutral	Satisfied	Very Satisfied
Overall satisfaction with the purchase process	<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Ease of ordering/purchasing	<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Knowledge of sales person	<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Timeliness of shipment	<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Keeping you advised of shipment status	<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Quality of shipment	<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
Quality of product	<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5

Exhibit XIX

Inclusion of Supplier in TCA: “New Wine” in the “New Bottle”

The previous sections of this paper discussed how the user interface for supplier creation has undergone a makeover in Release 12 and also looked at the new features in supplier profile maintenance. The best part is that this “New Bottle” now contains a more enriched Supplier Entity!! The supplier entity is now represented in Trading Community Architecture (TCA) just like other trading partners (like customers) were represented in 11i.

The trading community model is a highly flexible architecture and is used to capture information about trading partners and complex relationships between them. The key entities in TCA are:

1. Party: Entities of type Person or Organization that can enter into business relationships are called parties. Every party has a unique registry id in the TCA Registry. Information such as party name, addresses, contacts, contact points etc can be captured for a party.
2. Account: An Account represents the attributes of the deploying company’s selling relationship with a party.
3. Relationship: Captures the link between two independent parties. The party relationship is also a party by itself
4. Party Sites: Addresses for a party used for a specific purpose like bill-to, ship-to, pay site etc.
5. Contacts: People who have a contact or employment relationship with an organization or person
6. Contact Points: Means of contact like phone email etc.

When a supplier is created in R12, it gets automatically registered in the TCA registry and is given a registry id. The supplier can be queried in TCA and other modules using this registry id.

The screenshot shows the Oracle Payables interface for updating a supplier. The main form is titled "Update DAUG Test Supplier - 04567: Quick Update". The Registry ID field is highlighted with a red box and contains the value 57140. Below the form is a table for Supplier Sites.

Site Name	Operating Unit	Ship-To Location	Bill-To Location	Ship Via	Pay On	Alternate Pay Site
DAUG ADDRESS	Vision Operations					
2						

Exhibit XX

Inclusion of the supplier in the trading community architecture provides several enhanced features available in TCA to it. The following key benefits will be discussed in the subsequent sections:

1. Third Party Data Integration
2. Data Quality Management
3. Relationship Management
4. Visibility of Supplier Entity in Other Applications

Third Party Data Integration

The Trading Community Architecture has Third Party Data Integration with vendors like Dun & Bradstreet in order to enrich the data in the TCA registry. Sources like Dun & Bradstreet provide profile, demographic, credit COLLABORATE 08

risk and financial information for organizations. Inclusion of suppliers in TCA ensures that supplier profile data can be enriched using information from these third party sources. Both the third party data and manually entered data can co-exist on the supplier profile.



Exhibit XXI

Data Quality Management

Oracle TCA Data Quality Management (DQM) is a set of tools and features that provides powerful searching and matching functionality to parties. TCA integrates with DQM function for multiple purposes such as:

1. Identifying possible duplicates that currently exist in the Registry.
2. Prevention of duplicate entry into the Registry when records are created or updated.
3. Searching for parties, addresses, contacts, and contact points in the TCA Registry.
4. Merging similar parties using party merge facility

Duplicate suppliers can be identified based on different matching rules and the output can be reviewed using the Batch review screens. Suppliers can also be merged using the Party Merge Feature so that party profile level details can be combined.

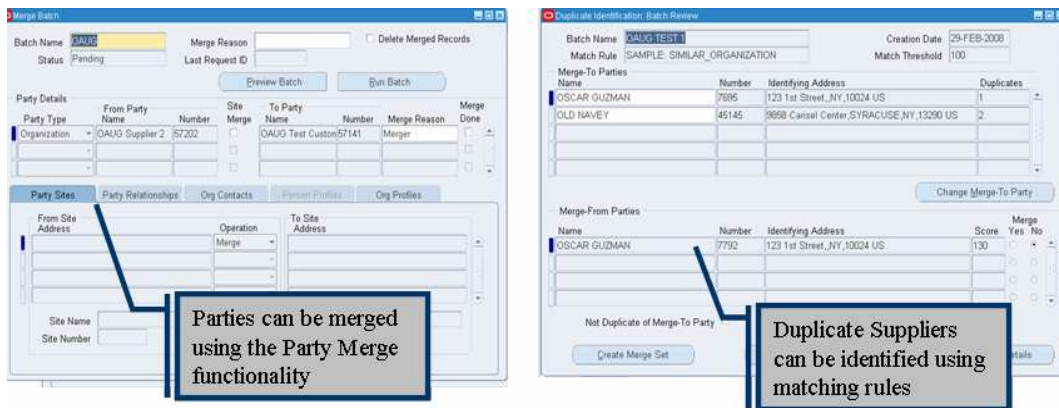


Exhibit XXII

Relationship Management

Oracle TCA Relationship Manager provides the functionality of creating and managing relationships among existing parties in the TCA Registry. The relationships can be used to model interactions between parties and make better business decisions. A comprehensive view of the business role of the party with respect to other parties can be obtained. Since suppliers are also included in TCA in Release 12, supplier relationships can be modeled in Relationship Management.



Exhibit XXIII

Visibility of Supplier Entity in Other Applications

The party entity is tightly integrated and visible in other modules and applications of Oracle EBS Suite. It can be converted into Customer Accounts, CRM Resources etc in related modules of Oracle so that transactions in multiple modules can be executed using the party entity. The Exhibit illustrates how the party created for a supplier is visible in CRM Applications like Telesales and can be used to execute multiple functions like opportunity capture, lead capture etc.

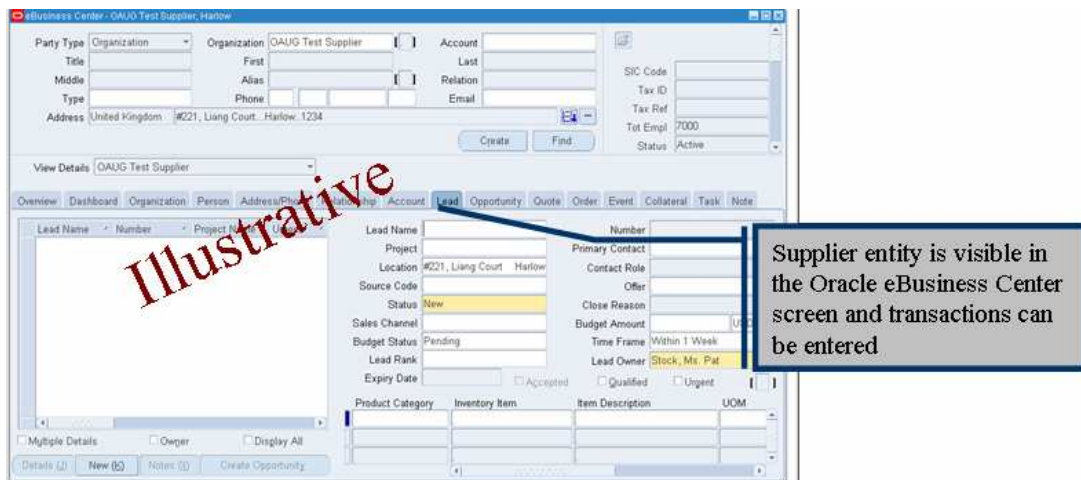



Exhibit XXIV

Conclusion

Supplier Creation and Maintenance has undergone a significant change in Release 12 of the Oracle eBusiness Suite. A new HTML based user interface has replaced the erstwhile forms based UI. The interface provides a more logical navigational path to supplier entry, starting with a search feature, followed by a Quick Supplier Update Page and ending with detailed maintenance pages. The supplier profile has also been logically segregated into attributes pertaining to company profile information and attributes pertaining to the terms & conditions of the business relationship. The supplier profile maintenance is more tightly integrated with applications like iSupplier Portal and e-Business Tax. Lastly, the supplier entity has now been included in the



Trading Community Architecture (TCA). This imparts many benefits to the entity like, 3rd Party data integration, data quality management, relationship management and unparalleled visibility in other EBS modules. The changes made to the supplier entity in Release 12 definitely indicates that users will now find **“Richer Content”** in a very **“Attractive” Package**