Graco iSupplier Get Started Training Document

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For more extensive iSupplier documentation, please visit www.graco.com/us/en/suppliers.html

Table of Contents

Introduction

Graco is deploying the Oracle iSupplier Portal application for all Supply Base Users to achieve the below objectives:

- Streamline processes to increase efficiencies by reducing administrative tasks
- Improve on-time delivery
- Enable process improvements within suppliers
- Realize business process benefit of real time visibility in Oracle iSupplier

Graco iSupplier Portal

The Graco iSupplier Portal is a secure, self-service web based application which provides collaboration between Graco Global Supply Management and Vendor base with:

a) Real time information to procure to pay transactions

b) Easy access through standard web browser

c) Information transparency across end to end P2P transaction from PO creation to final payment

d) Single point of visibility for all Graco operating units

e) Collaborative messaging integration through e-mail notifications

f) Support E2E procurement to pay sub processes

Oracle iSupplier Portal provides collaboration with Supplier in below four main areas:

- Purchase Order Collaboration
- Receiving and Payment Processes
- Planning and Inventory Processes
- Suppliers Profile Maintenance

Glossary of Terms

Term	Description
ISP	iSupplier Portal
PO	Purchase Order
T&C	Terms and Conditions
BPA	Blanket Purchase Agreement
ASN	Advance Shipment Notice

Objective

During this training course, Supplier Users will learn how to:

1. Login
2. Navigate Graco iSupplier Portal
3. Acknowledge Purchase Orders
4. Request Quantity and Shipment Purchase Order Changes
5. Set a Default Email Client

Training Topic Listing

Below is the listing of training topics covered in this document:

ID	Description
ISP-TRN00A	Registration Communication email and Initial Log in
ISP-TRN00B	Navigating Graco iSupplier Portal
ISP-TRN01	Acknowledge Purchase Order
ISP-TRN02A	Request Quantity and Shipment Purchase Order Changes
ISP-TRN03	Setting a Default Email Client

ISP-TRN00A: Registration Communication email and Initial Log in

Description

Approved supplier contacts will be registered by Graco supplier administrator for access to the Graco iSupplier Portal.

Registered supplier contact users will receive 'User ID' login and 'Initial Password' credential via email from Graco supplier administrator. The email page will also include the appropriate 'Link' to the Graco iSupplier Portal.
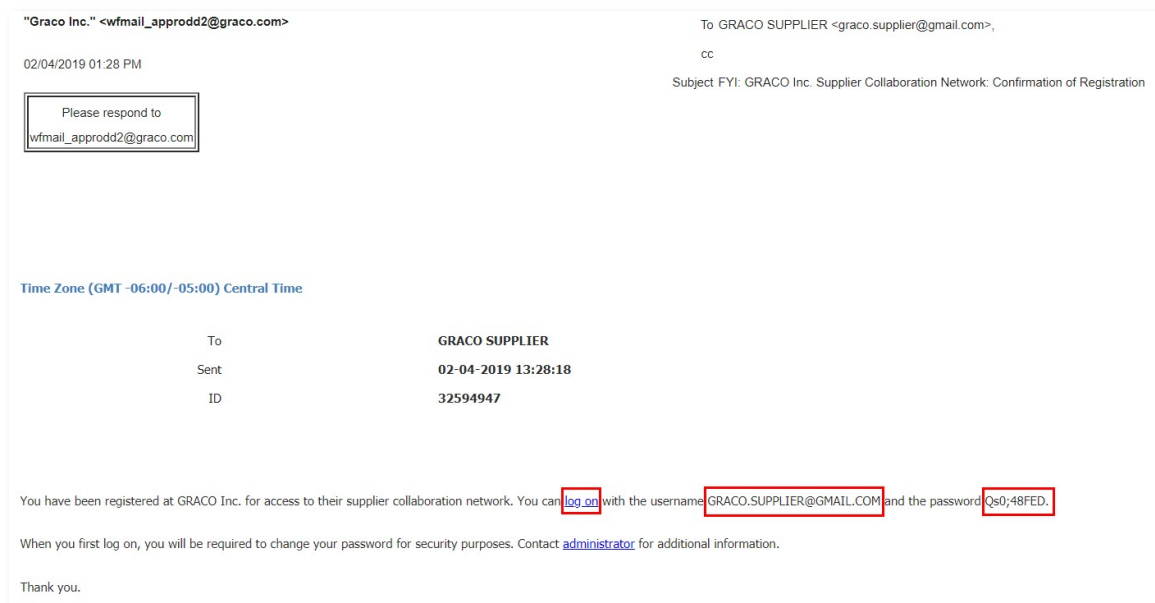
Using the Login, User ID and Initial Password received in email, login to the Graco iSupplier Portal.
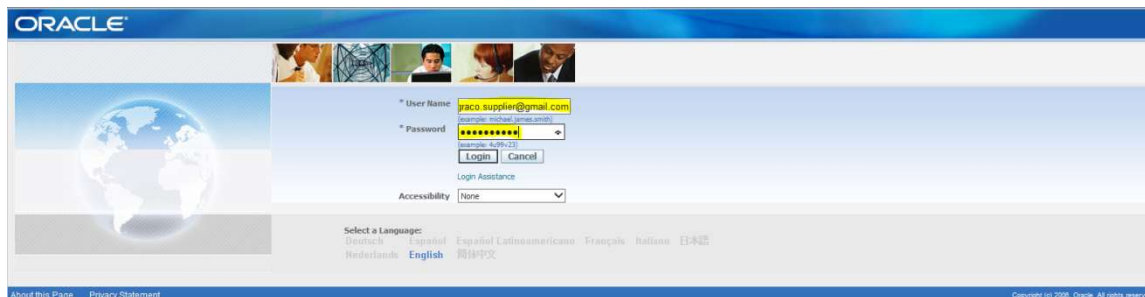
System will ask to change the password. Passwords must be at least 12 non-consecutive repeating characters, consisting of letters and numbers.

Once logged into the Graco iSupplier Portal, users will be assigned one or two responsibilities. All users will have the Graco Supplier Portal responsibility.

Graco Supplier Portal – This responsibility is for the below processes:

a) Acknowledge Purchase Orders

b) Request Quantity and Shipment Purchase Order Changes

c) Create Advance Shipment Notices (do not use unless authorized by Graco)

d) View Supplier Schedules

e) View Invoice and Payment Information

f) View Delivery Performance

g) Maintain Profile

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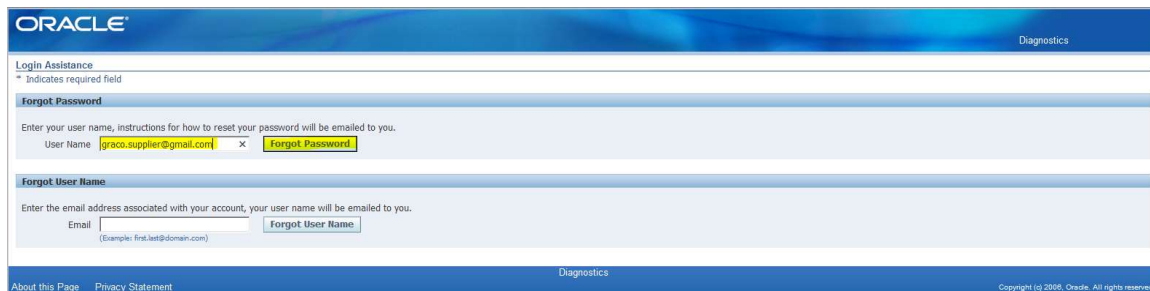
For assistance with a forgotten password, click on 'Login Assistance.'

Your email address is generally your User Name. Enter in the User Name and click 'Forgot Password.'

Instructions for how to reset the password will be emailed to you.

Warnings and Watch Outs

- The introduction of iSupplier will lead to more emails from Graco, Inc. Many of the emails are FYI notifications and do not require a response.

- iSupplier will also increase the number of PO revisions. Those notifications will require a response in order for Graco, Inc. to receive the PO.

- Purchase Orders must be fully acknowledged before a change can be requested.

- Do not request changes to any PO that has been partially received.

- Please be careful not to duplicate POs.

ISP-TRN00B: Navigating Graco iSupplier Portal

Navigation and Steps - Initial Log in with User ID and password

Click on the 'Graco Supplier Portal' menu link.
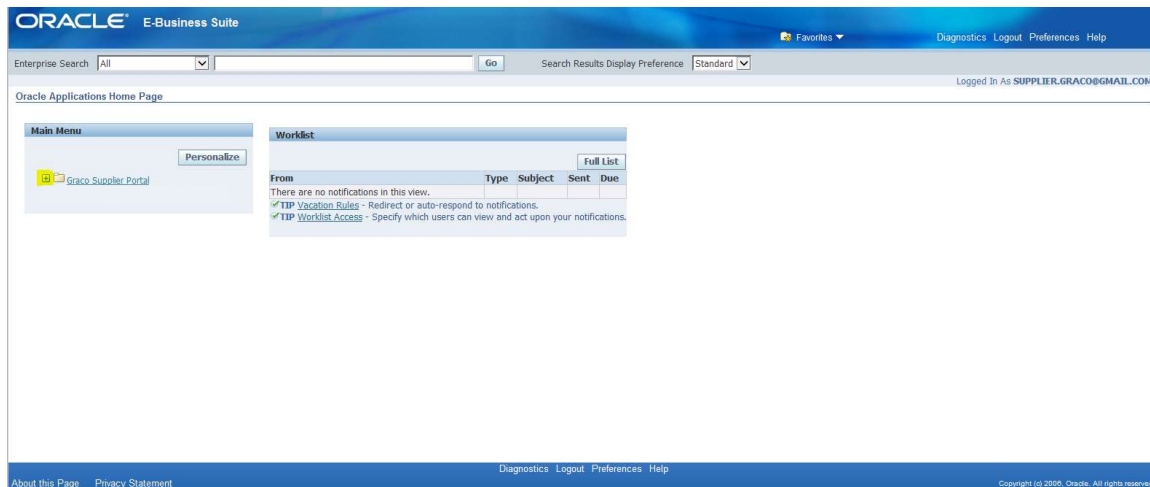
Graco Supplier Portal Home page is displayed.

1) Home Page Tabs
   Use the tabs on the home page to quickly access related task areas. For example, by clicking on the tab 'Orders,' it will open the Purchase Order list.

2) Quick Search
   The Quick Search feature is available from the Home page. Using Quick Search, search for Purchase Orders, Shipments, Invoices and Payments by selecting the type from the drop-down menu and entering the document number and clicking 'Go.'

3) Notifications
Notifications are messages waiting for review. Some notifications are FYI-only, while other notifications require action. To view all notifications, click the "Full List" button to open the Notification Details page. This page provides complete notification details, as well as the appropriate action button.

4) Orders At A Glance
This section displays the five most recent Purchase Orders. Click the 'Full List' button to view the Purchase Order details page.

5) Quick Links
This section is displayed on the right and provides quick access to all the procure-to-pay processes enabled for the Graco Supplier Portal application. Click any link to go directly to the corresponding page.

6) Hyperlinks
Click on any blue underlined number or word hyperlink to access detailed information about that transaction.

ISP-TRN01: Acknowledge Purchase Order

Description

For Direct and Indirect Procurement business processes, Sourcing Specialists maintain and communicate the following types of Purchase Orders to Suppliers using Oracle Purchasing application:

  a) Blanket Purchase Agreements
  b) Standard Purchase Orders
  c) Blanket Releases

As per Graco Purchasing policy, Suppliers need to acknowledge all Purchase Orders in the iSupplier Portal.

This will provide Buyer and Sourcing Specialist positive confirmation that Purchase Order is received and worked upon by Supplier.

Navigation and Steps

Graco Supplier Portal provides multiple ways to search and acknowledge Purchase Orders as detailed below:

1) **Acknowledge from Worklist Notification available from Log in page**
   Click on Subject hyperlink.

Acknowledgment Notification includes PDF copy of Purchase Order to download and review. Click on 'Purchase Order Attachment.'

Open the attachment.

Review and download the pdf copy of Purchase Order as needed.

After the Purchase Order is reviewed, click on the 'Accept' button to acknowledge the Purchase Order.

2) Acknowledge from Notification available within Home Page
Click on 'Graco Supplier Portal' responsibility to open the Home Page.

Acknowledgement Notification can also be opened by clicking Subject hyperlink in 'Notifications' Section.

After the PDF copy is reviewed by clicking 'Purchase Order Attachment,' click 'Accept' to acknowledge the Purchase Order.

Note – Each Section for 'Notifications' and Orders at a Glance' shows latest five records. All the records can be viewed by clicking on 'Full List' for the section.

3) **Acknowledge by opening Purchase Order from Section 'Orders At a Glance'**
Click on hyperlink under 'PO Number.'

Purchase Order form opens. 'Acknowledge' Action is default. Click button 'Go.'

Click button 'Accept Entire Order.'

'Acknowledge Purchase Order' form opens.
Click button 'Submit.'

PO Acknowledgement Confirmation:

4) Acknowledge from Orders tab
Click 'Orders' sub-tab. View 'All Purchase Orders' is default.
Check the status of the Purchase Order which 'Requires Acknowledgement,' select PO Number hyperlink to 'Acknowledge.'

Click button 'Accept Entire Order.'

Click button 'Submit.'

PO Acknowledgement confirmation:

Note – To View pending 'Purchase Orders to Acknowledge, select the option and click 'Go.'

This will display only the Purchase Orders with status 'Requires Acknowledgement.'

Note – Status of Blanket Purchase Agreements can be viewed separately under Agreements tab.

5) Acknowledge from Email

Supplier contact in the Purchase Order and registered for Supplier Portal will get email Notification to Acknowledge. Email includes the PDF copy of the Purchase Order.

Click 'Accept' Response and send the email draft. It will automatically record the acknowledgement of the Purchase Order in the system. Please refer to ISP-TRN03 for instructions to set up default email client if needed.

ISP-TRN02: Request Purchase Order Changes

Description

For Direct and Indirect Procurement business processes, Sourcing Specialists maintain and communicate the following types of Purchase Orders to Suppliers using Oracle Purchasing application:

- a) Blanket Purchase Agreements
- b) Standard Purchase Orders
- c) Blanket Releases

As part of Purchase Order Collaboration process, Supplier will be able to collaborate in real time in the Graco Supplier Portal responsibility.

- a) **Graco Supplier Portal –** Supplier can request changes on below attributes of Standard Purchase Order and Blanket Releases which will be routed to Material Planner for Approval:

    - i.   Quantity Changes
    - ii.   Split Shipments
    - iii. Date Changes

ISP-TRN02A: Request Quantity and Shipment Purchase Order Changes

Navigation and Steps

Responsibility **>** Graco Supplier Portal >Home Page

Change request form can be opened via different methods.

Click 'Orders' tab:

a) Make sure the Purchase Order status is 'Accepted' or 'Open,' and click on the PO Number hyperlink to open the Purchase Order form.

Action 'Request Changes' and click 'Go':

Change request form opens:

Click show:

There are three types of changes that can be requested:

a) Quantity Change
b) Promised Date
c) Split the Shipment Line
   Change can be requested individually or with any combination of quantity, date and split shipments.

Click on icon 'Split' to split the shipment line.

Enter the changed Quantity and Promised Dates for split shipment lines
Enter Reason and Action 'Change.'
Click 'Submit' button.

Change Order Confirmation
Changes are submitted to Graco material planner for review and approval.

Note
1) No new changes can be submitted until material planner review and the initial change submitted is approved.

Status of the Purchase Order will be 'Supplier Change Pending.'

2) On Approval of requested PO Changes by material planner, Purchase Order will be updated with the changes, status will be 'Open' and new changes can be submitted by Supplier.

Purchase Order updated with changes:

Navigator ▼   Favorites ▼   Home Logout Preferences Help Diagnostics

Standard Purchase Order: 2057997, 1 (Total USD 2,000.00)

Currency=USD   Actions [Request Changes ▼] [Go] [Export]

Order Information

General

Total	2,000.00
Supplier	Graco Supplier Inc
Supplier Site	Graco Supplier
Address	123 Main Street
	Alpharetta, GA 30005
Buyer	Free, Michael W (Mike)
Order Date	02-06-2019 13:36:23
Description	Training document Purchase Order
Status	Open
Note to Supplier	
Operating Unit	GRACO USA CORP
Supplier Order Number	
Attachments	None

Terms and Conditions

Payment Terms	NET 60
Carrier	
FOB	DESTINATION
Freight Terms	
Shipping Control	

Ship-To Address

Address	P O BOX 1441
	MINNEAPOLIS, MN 55440-1441

Bill-To Address

Address	PO BOX 1441
	accountspayable@graco.com
	MINNEAPOLIS, MN 55440

Summary

Total	2,000.00
Received	0.00
Invoiced	0.00
Payment Status	Not Paid

PO Details

Show All Details | Hide All Details

Details	Line	Type	Item/Job	Item Revision	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
⊟ Hide	1	Goods	16W721			CUP, SOLVENT, CS	EACH	200	10	2,000.00	Open		

Shipments

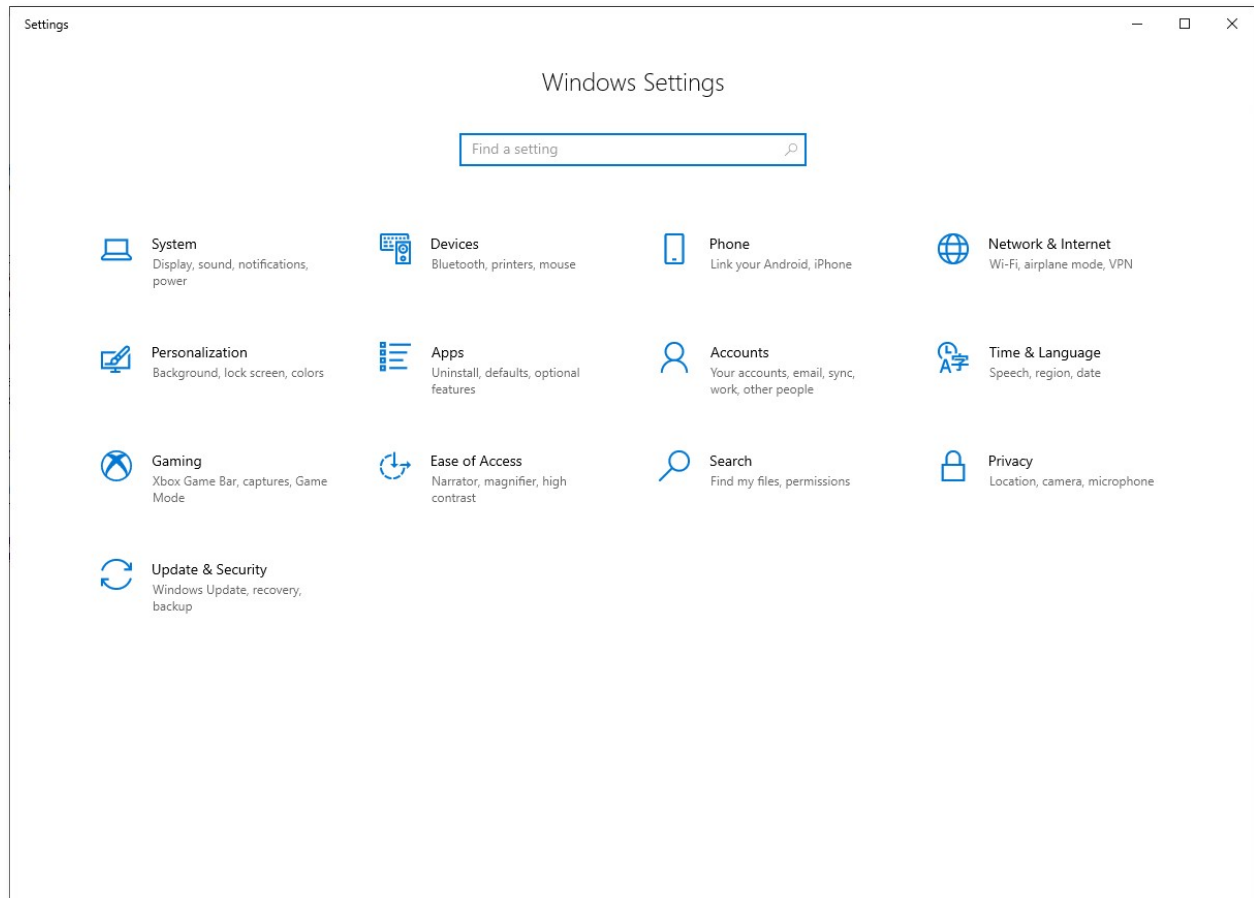| Shipment	Ship-To Location	Qty Ordered	Qty Received	Qty Invoiced	Amount Ordered	Amount Received	Amount Invoiced	Promised Date	Need-By Date	Payment Status	Status	Supplier Line	Split	Reason	Attachments
1	GRACO INC	150			1,500.00			03-08-2019 13:19:02	03-08-2019 15:30:00		Open				
2	GRACO INC	50			500.00			03-15-2019 13:19:07	03-08-2019 15:30:00		Open				

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ISP-TRN03: Setting a Default Email Client

Users must have a default email client setup to accept/reject notifications through their email.

Below is a brief explanation on how to do this:

On PC, Go to Start Menu >>Settings>>Apps>> Default apps >>Email>> Choose an app >> Select your default email client >> Close the window and restart your email

For more extensive iSupplier documentation, please visit www.graco.com/us/en/suppliers.html