



SUPPLIER WEBINAR FAQ

Q. For those that joined late, is there a recording of this webinar available?

A. Yes, the webinar has been recorded and can be found on MIPRO's YouTube channel here:
<https://youtu.be/TYx0ebn7jfQ>

Q. Does the supplier registration include the ability allow the vendor to enter the bank account information and how is access controlled?

A. Yes, bank information can be entered. See below.

Existing suppliers access self-registration pages to add a new user account through the supplier portal. New bidders and new suppliers can access online registration through a URL provided in an email invitation. Internal users can access online registration pages through the employee portal. Any prospective registrants can also access pages through a link on a public website. If you want to control who can see the bank information when registering, then you could use Page and Field configurator to do so.

The screenshot shows the 'Payment Information' page, Step 5 of 7. The page is divided into several sections:

- Payment Preferences:** Includes fields for Requested Payment Terms, Invoice Address, Remit Address, Withholding Required, Enable Email Payment Advice, Email Address, and Payment Method.
- Supplier Banking Information:** Includes fields for Country (USA), Bank Name, Branch Name, Bank ID Qualifier, Account Type, Bank ID, Bank Account Number, and DFID ID.
- Bank Address:** Includes fields for Country (USA), Address 1, Address 2, Address 3, City, Country, Postal, and State.
- Bank Phone:** Includes fields for Prefix, Phone, Ext, and Fax.
- Attachments:** Includes a button to Add Attachment.
- Additional ID Numbers:** Includes a table with columns for Bidder ID, Type, and ID Number, and a button to Add ID Number.
- Comments:** Includes a text area for comments.
- URL Information:** Includes a table with columns for URL ID and Description, and a button to Add URL.

At the bottom of the page, there are buttons for 'Exit', 'Save for Later', '< Previous', and 'Next >'. A note at the bottom left states '*Required Field'.



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Q. If banking can be added, is this process PCI compliant?

A. Link to PCI compliance vs. certification in PeopleSoft. You will need your Oracle support id and password.

https://support.oracle.com/epmos/faces/DocumentDisplay?_afLoop=282948252401439&id=1103759.1&_afWindowMode=0&_adf.ctrl-state=bwgub2c8z_4

Q. is there an approval workflow on the supplier change request?

A. Using the PeopleSoft Fluid User Interface, approvers can view a list of pending approvals for supplier change requests submitted by suppliers and add comments on the centralized Pending Approvals page. An approver or multiple approvers review the change request details, along with other details such as Contact details, and Error details. Each approver in the workflow selects an appropriate action, such as Approve, Deny, Pushback (only available for multiple approvers), or Request Information within the approval pages.

Q. Can item creation be done by suppliers? And send for our internal approval?

A. That functionality is not available delivered that I am aware of.

Q. Is there a classification standard that you plan to use such as NAICs?

A. Classifications will be 100% configurable and will not have any seeded data. It's up to the customer to define classifications to meet their needs

Q. How does the invoice upload process work?

A. External Supplier users can upload invoices using Microsoft Excel. Select the ExcellInvoiceUpload.xls file delivered with PeopleSoft eSettlements to enter the invoice data in Microsoft Excel. A Visual Basic (VB) macro built in the file converts the invoice data into an XML and posts the file to an URL defined in the Microsoft Excel Template worksheet. The excel upload functionality is delivered to the External Supplier users as a web service. Enabling web services is discussed in the documentation PeopleTools Integration Broker.



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Suppliers must also ensure that they import their customers SSL Digital Certificates on their computers before utilizing the eSettlements Excel Invoice Upload Functionality. In addition, the XML can be Saved from the Excel Workbook and attached to the Upload Invoice Page as an alternative to using the Web Service. Here is the section in PeopleBooks:

https://docs.oracle.com/cd/F32004_01/fscm92pbr36/eng/fscm/fmpy/task_UploadInvoicesInPeopleSoftFluid.html?pli=ul_d52e131_fmpy

Q. is this the "eSupplier Connection" module?

A. Yes, eSupplier Connection was one of multiple module functionality demonstrated.

Q. We currently are not using Supplier self-service. Is the e-Settlement part of the supplier self-service or is it a separate module to implement.

A. Supplier self service is an over arching description. What was demoed was functionality for suppliers for eSupplier Connection, eSettlements, Strategic Sourcing and Supplier Contracts all using the Supplier Portal.

Q. Is the Kaiser success story a recent implementation?

A. Per Amira, yes. Amira also offered to arrange more details.

Q. Is that dashboard on the Kibana visualization?

A. No, it was using the delivered embeddable pagelets powered by queries and pivot grids.

Q. Does the User Registration include AWE approvals that can be configured once a supplier/bidder has self-registered?

A. Yes. Once the supplier submits, the approvals process setup for your supplier approvals is initiated.



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Q. AdventHealth is interested in how they would request to be a supplier or request changes.....will you be showing how that flows to an approval process on some changes and perhaps others would flow automatically? What about banking info? Can you restrict who can see that? Thanks.

A. A quick overview of the registration process and change requests was shown. The approvals process was not shown but the approvals are still required before the supplier can be fully registered and approved in PeopleSoft. Please see answer above on banking information. Here is a link to PeopleBooks discussing the online supplier approvals process.

https://docs.oracle.com/cd/F32004_01/fscm92pbr36/eng/fscm/fspr/task_ManagingOnlineRegistrationApprovals.html

Here is the business process flow for supplier registration:

https://docs.oracle.com/cd/F28475_01/fscm92pbr35/eng/fscm/bpms/bpm_FSCM_001008_03.html

Q. Can you restrict what the supplier can do and not do.

A. Yes. As in other aspects of PeopleSoft, everything is based on setting up users and roles and controlled by security. The user that I used in the demo is JSCOTT. As can be seen below, the user id is setup with roles and permissions etc. the same as normal employee users.

General | ID | Roles | Workflow | Audit | Links | User ID Queries

User ID: JSCOTT
Description: James Scott
☐ Account Locked Out?

Logon Information

Symbolic ID:

☐ Change Password?
☐ Password Expired?

User ID Alias:

[Edit Email Addresses](#) [Instant Messaging Information](#)

General Attributes

Language: ☐ Enable Expert Entry
Currency:
Default Mobile Page:

Permission Lists

Navigator Homepage:
Process Profile:
Primary:
Row Security:

General | ID | Roles | Workflow | Audit | Links | User ID Queries



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General
ID
Roles
Workflow
Audit
Links
User ID Queries

User ID JSCOTT
Description James Scott

Dynamic Role Rule

Execute on Server

Process Monitor
Service Monitor

User Roles

						1-10 of 36					View All
Role Name	Description	Dynamic		View Definition							
ADMINISTRATOR	Administrator	☐	Route Control	View Definition							
COSP Fluid Secure	COSP Fluid Secure	☐	Route Control	View Definition							
EMPLOYEE	Company Employee	☐	Route Control	View Definition							
EM_HOST_ADM_FUNC	Host Functional Admin	☐	Route Control	View Definition							
EM_HOST_ADM_TECH	Host Technical Admin	☐	Route Control	View Definition							
EM_SELLER_ADM	Supplier Administrator	☐	Route Control	View Definition							
EM_SELLER_AR	Supplier Accounts Receivable	☐	Route Control	View Definition							
EM_SELLER_CSP	Supplier Commercial	☐	Route Control	View Definition							
EM_SELLER_TREAS	Supplier Treasurer	☐	Route Control	View Definition							
EOAW_ADMINISTRATC	EO Approvals administrator	☐	Route Control	View Definition							

Q. Do you have to have eSettlements in order for Suppliers to access Self Service Invoices?

A. Yes

Q. We use Ariba for our eProcurement activities and Psoft for our payables. Do you need to have eSettlements enabled in order to use the supplier portal invoice/payment tiles?

A. In order to use the delivered invoice and payment tiles that were demoed, yes, eSettlements is required to be setup and configured.



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Q. Are there any built-in validations on the supplier info - IRS, US postal service, email warning?

A. Yes. For example the Tax id has to be 9 characters or a warning is issued. Valid state, countries etc. You must choose from appropriate drop down lists. There are also the required fields that need to be answered.