ALLETE Oracle iSupplier Portal

SUPPLIER TRAINING DOCUMENTATION
Contents

Oracle iSupplier Portal Training Guide ............................................................................................................. 2

1. Supplier Collaboration Network: Confirmation of Registration and log in ..................................................... 2
2. General Preferences ........................................................................................................................................ 4
3. Home Page and Worklist .............................................................................................................................. 5
4. Notifications to Suppliers .............................................................................................................................. 7
   A. Important note about email notifications to Suppliers .............................................................................. 7
   B. Supplier Collaboration Network: Confirmation of Registration ................................................................. 7
   C. Purchase Order Notification ..................................................................................................................... 8
   D. Complex Purchase Order Notification ..................................................................................................... 9
   E. Agreement (Contract Purchase Agreement or Blanket Purchase Agreement) Notification ....................... 10
   F. Purchase Order or Agreement requiring Acceptance ............................................................................... 11
   G. Response to Purchase Order or Agreement Change Request notification ............................................. 12
   H. Deliverable Notification ............................................................................................................................ 12
   I. Sourcing RFQ or RFI invitation notification ............................................................................................. 13
   J. Closed or Cancelled Notifications .......................................................................................................... 14
5. ALT iSupplier User – Custom: View Purchase Orders, Invoices, Payments, Deliverables .................................. 15
   A. iSupplier Home Screen ............................................................................................................................. 15
   B. Orders Tab ................................................................................................................................................ 16
   C. View Purchase Order or Agreement ...................................................................................................... 17
   D. View Agreements (Contract Purchase Agreements and Blanket Purchase Agreements) ..................... 19
   E. Acknowledge Purchase Order or Agreement ......................................................................................... 23
   F. Request Changes to a Purchase Order or Agreement ............................................................................ 25
   G. Deliverables ............................................................................................................................................ 28
   H. View Invoices .......................................................................................................................................... 30
   I. View Payments ....................................................................................................................................... 31
6. ALT Sourcing Supplier – Custom: View and Respond to Requests for Information (RFI) or Quotes (RFQ) ............ 32
   A. View RFQ or RFI, Notes, Attachments, Requirements, Contract Terms, Deliverables ............................. 33
   B. Acknowledge Participation ...................................................................................................................... 36
   C. Create Quote or Response ...................................................................................................................... 37
   D. Withdraw or Revise Quote ...................................................................................................................... 39
   E. Online Discussions ................................................................................................................................ 42

Page 1 of 43
Oracle iSupplier Portal Training Guide

The Oracle iSupplier portal allows ALLETE’s Supplier partners to view purchase orders, invoices, payments, and agreements, and receive purchase order and agreement email notifications. Suppliers are also able to acknowledge and request changes to purchase orders and agreements, create advance ship notices and upload deliverable requests.

1. Supplier Collaboration Network: Confirmation of Registration and log in

ALLETE’s purchasing department will assist suppliers with registration for the iSupplier portal. The username is usually an email address. It is recommended to use an email address/email inbox that is checked by multiple people at your organization, to ensure notifications are not missed.

Suppliers will receive an email notification, confirming iSupplier registration, containing the username and password.

NOTE: ALLETE recommends using an email address for an email box that is checked by multiple users, to ensure notifications are not missed if you are on vacation or not available.

![Email Notification Example]

a. Click the log on link to open the iSupplier portal web page.
b. Username.
c. Password.
a. Username.
b. Password.
c. Click Login.
d. Login Assistance. If your username does not work, try resetting the password using the Login Assistance button. If username and password still do not work, email iSupplierinquiries@allete.com.
e. ALLETE will not respond to requests to register from this page. To request registration for the iSupplier portal, contact iSupplierinquiries@allete.com or the ALLETE Purchasing Department.
2. General Preferences

Click Preferences for options to personalize your main screen view.

a. Visual:
   (a) Icons only will display the buttons at the top of the screen as icon buttons only.
   (b) Both Icons and links will display the buttons at the top of the screen as icon buttons and links (as shown above).
   (c) Links only will display the links only at the top of the page.

b. Change Password if necessary.
3. Home Page and Worklist

a. **Worklist**: Notifications for purchase orders, acknowledgements, change requests, sourcing requests for quotes, will display.

b. **Full List**: Click Full List and choose All Notifications to display additional notifications and closed notifications. (fyi type notifications will close once viewed in email or worklist, but can still be viewed under All Notifications).

c. **Navigator**: Displays the responsibilities which have been assigned to the Supplier.
   i. ALT iSupplier User – Custom: Suppliers view and respond to Purchase Orders and Contract Attachments, Contract Purchase Agreements, Blanket Purchase Agreements, Invoices, Payments, Deliverables.
   ii. ALT Sourcing Supplier – Custom: Suppliers view and respond to Requests for Quotes, Requests for Information.

d. **Vacation Rules**: Suppliers can set up vacation rules to redirect notifications to another supplier user within their organization. The supplier user will be required to have an iSupplier log in and password in order to view and respond to those redirected notifications.

Click Create Rule.

Click Next.
Select the contact from within your organization, click **Apply**.

The vacation rule Status will be **Active** within the dates of the vacation rule and **Inactive** outside of those dates.

Click **Update** to change the dates next time you are on vacation.
4. Notifications to Suppliers

Suppliers will receive notifications of a Purchase Order or Agreements, Deliverables, Requests for Quotes or Information via email or Oracle iSupplier worklist.

A. Important note about email notifications to Suppliers

Purchase Order .pdf of PO print will send in the email to the supplier, however, the Contract Attachments, which are part of that Purchase Order, do not travel with the email. Suppliers will receive a message with the emailed notification that shows that the attachments have been removed. Suppliers will need to log in to the iSupplier portal to view the Purchase Order and Contract Attachments.

B. Supplier Collaboration Network: Confirmation of Registration:

Log in to the iSupplier portal with the user name (usually your email address) and the password listed on this notification.
C. Purchase Order Notification:

![Minneapolis Power (OU) - Standard Purchase Order 5311108481, 0](image)

**From:** Paulson, Vanessa  
**To:** TEST SUPPLIER INC  
**Sent:** 13-May-2017 09:13:35  
**Closed:** 13-May-2017 09:14:37  
**ID:** 3231803

**Responder:**  
This attached order, along with any contract attachments, is the agreement between the Supplier and Purchaser.

**To access all attachments,** Supplier must log in to ALLETE's iSupplier portal.  
- Log-in to iSupplier portal:  
  - [https://partner.alie.ta.com](https://partner.alie.ta.com)  
- Under main menu, click on ALT iSupplier User (top left)  
- Click on the Orders tab (top left)  
- Under the PO Number column, click on the linked PO number  
- View Contract Attachments:  
  - Under Order Information: Contract Attachments  
  - Under PO Details: Contract Attachments  
- CLICK here to see the Oracle iSupplier Portal Training Guides, Access Purchase Orders and Attachments

*If you don't have log-in information for the iSupplier portal, please contact isupplierinquiries@alie.ta.com and reference the purchase order number.*

**References**

[PDF Document]

Log in to the Oracle iSupplier portal to view the Purchase Order and Attachments.
Log in to the Oracle iSupplier portal to view the Complex Purchase Order (retention or progress payment type Purchase Order) and Attachments.

References

- PDF Document
- Zip Attachment
E. Agreement (Contract Purchase Agreement or Blanket Purchase Agreement) Notification

Log in to the Oracle iSupplier portal to view the Agreement and Attachments.
F. Purchase Order or Agreement requiring Acceptance

From: Paulson, Vanessa

This attached order, along with any contract attachments, is the agreement between the Supplier and Purchaser.

To access all attachments, Supplier must log in to ALLETE’s iSupplier portal.
- Log-in to iSupplier portal:
  - https://partner.allete.com
- Under main menu, click on ALT iSupplier User (top left)
- Click on the Orders tab (top left)
- Under the PO Number column, click on the linked PO number
- View Contract Attachments:
  - Under Order Information: Contract Attachments
  - Under PO Details: Contract Attachments
- Click here to see the Oracle iSupplier Portal Training Guides. Access Purchase Orders and Attachments

If you don’t have log-in information for the iSupplier portal, please contact supplierinquiries@allete.com and reference the purchase order number.

Acknowledge receipt of order

This notification requires that you acknowledge receipt of the order and associated contract attachments. To do so, please click on one of the following choices below to automatically generate an acknowledgement e-mail. Response to be sent to the ALLETE buyer. Receipt of the purchase order can also be acknowledged in the Supplier portal. Click here to see the Oracle iSupplier Portal Training Guides. Accept or Acknowledge Purchase Orders or Agreements.

Please click on one of the following choices to automatically generate an E-mail response. Before sending the E-mail response to close this notification, ensure all response prompts include a desired response value within quotes.

Accept

Response: Accept  Reject

Purchase Orders or Agreements can be accepted by clicking the blue Accept button, or by logging in to the iSupplier portal to accept.
G. Response to Purchase Order or Agreement Change Request notification

This is an FYI notification and does not require a response.

H. Deliverable Notification

Log in to the iSupplier portal to view and respond to the Deliverable request.
I. Sourcing RFQ or RFI invitation notification

Log in to the iSupplier portal to view the negotiation details and acknowledge participation (see Chapter 6 for more details).
J. Closed or Cancelled Notifications

The Status of the Notifications can be Closed or Cancelled if you have already responded to it. This means that the notification is closed or cancelled; it does not mean that the PO or RFQ is cancelled. Log in to the iSupplier portal and query a Purchase Order or RFQ to determine its status (see Chapter 5 for more details on how to view Purchase Orders).

This notification has already received a response from the Supplier; the Supplier responded to it again and received this notification.
5. ALT iSupplier User – Custom: View Purchase Orders, Invoices, Payments, Deliverables

Click on the responsibility ALT iSupplier User- Custom, Home Page.

A. iSupplier Home Screen
   a) View Purchase Orders
   b) View Contract Purchase Agreements and Blanket Purchase Agreements
   c) View Shipments
   d) View Invoices and Payments
   e) View Invoices
   f) View Payments
B. Orders Tab

- a. Acknowledge Purchase Orders and Agreements.
- b. Request Cancellation of line or entire Purchase Order or Agreement
- c. Request Changes to Purchase Order or Purchase Order Lines or Agreement
- d. View Status of Purchase Order or Agreement
- e. View Purchase Order and Agreement Contract Attachments at the Purchase Order Header and Agreement Header (please also view Contract Attachments at the Purchase Order line level by clicking on the individual Purchase Order)
- f. Deliverables.
C. View Purchase Order or Agreement

Click on the **PO Number** or **Agreement Number**. Note the Document Type and the Status. If there is an Acknowledgement required, note the Acknowledge-By Date.

![Purchase Order Screen Screenshot]

- a. View Purchase Order or Agreement Header information. Note Contract Attachments at the Header level.
- b. View PO Details or Lines. Note Contract Attachments at the Line level.
- c. Use the Actions drop down menu to view PDF of PO Print, Request Changes or Cancellation to the Purchase Order or Agreement.
Click **Show All Details** to expand the Line and view additional line information.
D. View Agreements (Contract Purchase Agreements and Blanket Purchase Agreements)

Click the Agreements Link.
Search for Agreements by entering required parameters or click Go to view all Agreements.

Note the Document Type and Contract Attachments:

- **Blanket Purchase Agreement (BPA)**- Agreement tied to specific items with negotiated pricing. Individual Purchase Order numbers will release against the BPA and the supplier will invoice against the individual Purchase Order Number releases.

- **Contract Purchase Agreement (CPA)**- Agreement tied to a scope of work for items or services where the exact items or services are not known. Rates price lists are negotiated and the individual requesters will create Standard Purchase Order releases against CPA either before or after the items or services are delivered. *When requesters schedule work or request materials before the individual Purchase Order Releases are created, the Suppliers must submit invoice to accounts payable@allele.com, listing the name of the requester and the CPA number.*
View the Blanket Purchase Agreement Lines by clicking on the PO Number (BPA Number) as shown in top picture, then click on the PO Number again.
The Blanket Purchase Agreement (BPA) lines and negotiated pricing will display at the bottom of the screen.
E. Acknowledge Purchase Order or Agreement

The buyer may require Acknowledgement on the Purchase Order or Agreement. The supplier can acknowledge the Purchase Order or Agreement while logged into the iSupplier Portal, or from the email notification.

Buyers may require:

- Acknowledgement
- Acknowledgement by date
- Acknowledgement by Signature (Signature option is only available while logged in to the iSupplier portal and the buyer will also need to log in and acknowledge).

Select the Purchase Order or Agreement by clicking the button to the left of the PO Number. Notice the Acknowledgement Status or Acknowledge By Date. Click Acknowledge.

Click Accept Entire Order.
Enter Note to Buyer if necessary, Click Submit.

*The Purchase Order or Agreement will be in Pre-Approved status until the Buyer acknowledges the Order.*
F. Request Changes to a Purchase Order or Agreement

Select the Purchase Order or Agreement by clicking the button to the left of the PO Number. Click Request Changes.
Suppliers can request changes to:

- Supplier Item Number
- Quantity
- Price
- Promised Date
- Cancel a line or Entire Order

A. Update the fields required,
B. Enter a Reason,
C. Choose an Action of Change or Cancel (to cancel a line) from the Action drop down menu.
D. Click Submit.
A notification will be sent to the Buyer on the Purchase Order or Agreement.

Once the Buyer accepts the changes to the Purchase Order or Agreement, a notification will be sent back to the Supplier with the response to the changes. The Purchase Order or Agreement will automatically be revised and approved.
G. Deliverables

A Buyer can require a deliverable from the Supplier, such as an insurance certificate.

Click on the Deliverables tab to view the Deliverable.

Click **Go** to view all Deliverables. Click **Update** to respond to the Deliverable.
Add Attachment or note to the buyer, change the Status to Submitted, click Apply.

The status of the Deliverable will change to Submitted. Any overdue deliverable will show an alert as overdue. Reminder notifications of overdue Deliverables will send to the Supplier and to the Buyer for any overdue Deliverables.
H. View Invoices

Click the Invoices link.

Search for invoices by entering required parameters, or click Go to see all invoices.

The Invoice number, date, Status, PO Number, Due Date, etc. are available.
I. View Payments

Click the Payments link.

Search for Payments by entering required parameters or click Go to see all Payments, the payment status, payment number, etc.
6. ALT Sourcing Supplier – Custom: View and Respond to Requests for Information (RFI) or Quotes (RFQ)

Click on the responsibility **ALT Sourcing supplier – Custom → Sourcing Home Page.**

Note Your Company’s Open Invitations. Click on the **Negotiation Number** to view the RFQ.
A. View RFQ or RFI, Notes, Attachments, Requirements, Contract Terms, Deliverables

Header Tab

a. View all information, notes and attachments under the **Header tab, Lines tab, Controls tab, & Contract Terms tab**.
b. Acknowledge Participation, Create Quote, view printable view, Online discussions.
c. View and respond to Requirements if applicable.
d. View Additional header Attributes, Notes and Attachments.
Under the **Lines tab**, view line information. Click on the line description for further information, notes and attachments.

View Notes and Attachments, Need-By Date at the line level.

Click on the **Ship-to Address** to view full address.
**Controls Tab**, view the Open and Close Date of the RFQ, and Response Rules.

**Contract Terms tab**, Preview Contract Terms and Deliverables, if required.
B. Acknowledge Participation

From any tab, use the Actions Drop down menu to select Acknowledge Participation and click Go.

Enter a Note to Buyer if desired, click Apply.
C. Create Quote or Response

From any tab, use the Actions drop down menu to select Create Quote and click Go.

At the Header tab:

a. Enter a Quote Valid Until date and Reference number.
b. Add Attachments if applicable.
c. Requirements (if the Buyer requested), enter a response to the Requirement.
d. Click the Lines tab (a price must be added under the lines tab in order for the quote to be submitted).
Lines tab:

a. Enter a Quote Price for each line.
b. The Promised Date will default from the requisition Need-By Date. Update this date if the lead time is longer than the Need-By Date listed.
c. Click Continue.

Review and Submit.
If you need to withdraw or revise a quote that has already been submitted, at the bottom of the Sourcing Home Page, Quick Links, View Responses, click **Active**. *Once the RFQ closes, quotes cannot be withdrawn or revised.*

**Note Response Status:**

- **Draft**: RFQ or RFI response not yet submitted to the Buyer.
- **Active**: RFQ or RFI response submitted to the buyer, but the RFQ/RFI is still open. Active response can be withdrawn and/or revised and resubmitted.
Withdraw Quote:

Select the Response number and click the **Withdraw** button to withdraw the response.

- **Withdraw Quote:** will permanently withdraw the quote and the quote will not be eligible for evaluation or award.
- **Revise Quote:** will allow you to edit and resubmit the quote.

Enter a Withdrawal Reason and click **Submit**.

Revise Quote:

Select the response number and click the **Revise** button to revise the quote.
Quote information can be updated under the Header and Lines tabs.

- Update quote price,
- add or delete attachments,
- use the Update pencil to update information within the line,
- click Continue.
- Revert to Active Quote will retain the original quote information and not revise the quote.

Once quote is revised, click Submit.
E. Online Discussions

Suppliers and Buyers can communicate online through the **Online Discussions** functionality. From the Actions drop down menu, choose Online Discussions and click **Go**.

Click **New Message** and click **Go**.
Enter message and attachment if required, click **Send**.

Buyer will respond within the Online Discussions.

An email will also send to the Supplier’s email address.

The Supplier will need to log in to iSupplier to read the message under Online Discussions.