Scholastic
Oracle Cloud
Supplier Portal
User Guide
# Table of Contents

Introduction to the Supplier Portal .................................................................................................................. 3
  What is the Supplier Portal? ............................................................................................................................ 3

Navigating the Supplier Portal ........................................................................................................................... 3
  Logging in ...................................................................................................................................................... 3
  Homepage Navigation .................................................................................................................................... 5
  Notifications .................................................................................................................................................. 5
  Overview Menu ............................................................................................................................................. 6
    Summary Tab .............................................................................................................................................. 6
    Orders Tab .................................................................................................................................................. 7
    Schedules ................................................................................................................................................... 8
    Negotiations Tab ...................................................................................................................................... 9

Request for Quote (RFQ) .................................................................................................................................. 10
  Receiving an Invite for a Negotiation ........................................................................................................ 10
  Viewing the RFQ .......................................................................................................................................... 10
  Creating a Response ..................................................................................................................................... 12
  Award Decision ........................................................................................................................................... 18

Purchase Orders (PO) ...................................................................................................................................... 20
  PO Notification ........................................................................................................................................... 20
  Review PO Details ...................................................................................................................................... 21
  Acknowledge a PO ...................................................................................................................................... 22
  Enter/Revise a Promised Ship Date for a Schedule .................................................................................. 24
  Manage Schedules ..................................................................................................................................... 26
  Order Life Cycle ......................................................................................................................................... 27

Invoices ............................................................................................................................................................ 29
  Create and Submit an Invoice ...................................................................................................................... 29
    Tax ............................................................................................................................................................... 31
    Miscellaneous Charges ............................................................................................................................. 31
  View Invoices .............................................................................................................................................. 33
  View Payments .............................................................................................................................................. 34
  Supplier Preferences ...................................................................................................................................... 36
Introduction to the Supplier Portal

What is the Supplier Portal?
The Scholastic Supplier Portal is a secure, web-based workspace that provides our vendors with full visibility to Scholastic transactions, including request for quotations (RFQ), purchase orders, and invoices.

The Supplier Portal plays a key role in Scholastic’s Oracle ERP transformation, as this tool helps improve communication with our suppliers by automating and streamlining the source-to-settle process.

Navigating the Supplier portal

Logging in
You will receive a Supplier Portal invitation with a custom link to create a password and log in.

Once your password has been set, click on the “Oracle Fusion Prod” icon to reach the Supplier Portal home page.
Now login using your Scholastic Supply Portal ID and newly created password
Homepage Navigation
On the home page, click on the Supplier Portal icon to open the “Overview” page.

Notifications
At the top right corner of the home page, a bell icon will display your pending notifications. This includes new purchase orders pending acknowledgement as well as invitations to a negotiation.

Note: Clicking on the notification brings you to the PO or Negotiation in question
Overview Menu
The overview page provides a snapshot into Scholastic’s most recent transactions as well as anything requiring attention.

Summary Tab
**Worklist:** A list of all pending notifications sent to the current supplier user. These are the same notifications found in the bell at the top of the page. Please note that most notifications will also be sent via email.

**Watch list:** Contains a set of saved searches which display counts of urgent or recent transactions, possibly requiring action, such as Orders Pending Acknowledgment. Clicking a watch list entry navigates direct to the screen so that user can begin working on the transactions immediately.
Orders Tab
Contains the header detail of our purchase orders. The header contains the PO issued date and the total $ amount ordered. The item level detail, quantity, and ship-to locations can be found in “Schedules”.

Orders with Recent Activity: A list of orders that have been Opened, Changed, or Canceled within the last week. This date can be manually changed to display more or less orders.
Schedules
A purchase order “Schedule” contains the quantity, ship-to location, and promised ship date. An order with a ship date in the past is highlighted with an alert. Schedules must be kept up to date. The promised ship dates that you provide are visible for everyone at Scholastic.

At the bottom, “Recent Receipts” will list all purchase order schedules received within the last week.
**Negotiations Tab**

Request for Quotation (RFQ) transactions that the supplier is involved in or is invited to by Scholastic. It provides a quick summary to easily monitor the status and responses.

<table>
<thead>
<tr>
<th>Negotiation Title</th>
<th>Negotiation Type</th>
<th>Time Remaining</th>
<th>Response</th>
<th>Response Status</th>
<th>Unread Messages</th>
<th>Recommended Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Higgins Back to School Kit</td>
<td>RFQ</td>
<td>0 Seconds</td>
<td>4001</td>
<td>Pending award</td>
<td>0</td>
<td>View Responses History</td>
</tr>
<tr>
<td>Higgins Back to School Kit</td>
<td>RFQ</td>
<td>0 Seconds</td>
<td>Bid</td>
<td>Pending award</td>
<td>0</td>
<td>View Responses History</td>
</tr>
<tr>
<td>Higgins Diary</td>
<td>RFQ</td>
<td>0 Seconds</td>
<td>Bid</td>
<td>Pending award</td>
<td>0</td>
<td>View Responses History</td>
</tr>
<tr>
<td>Higgins Back to School Kit</td>
<td>RFQ</td>
<td>0 Seconds</td>
<td>Bid</td>
<td>Pending award</td>
<td>0</td>
<td>View Responses History</td>
</tr>
</tbody>
</table>

**Open Invitations**

<table>
<thead>
<tr>
<th>Negotiation Title</th>
<th>Negotiation Type</th>
<th>Supplier Site</th>
<th>Close Date</th>
<th>Will Participate</th>
<th>Unread Messages</th>
<th>View PDF</th>
<th>Response SpreadSheet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harry Potter Booster</td>
<td>RFQ</td>
<td>CDW-1U</td>
<td>4/29/18 3:39 PM</td>
<td>2</td>
<td>0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Completed Negotiations**

<table>
<thead>
<tr>
<th>Negotiation Title</th>
<th>Negotiation Type</th>
<th>Close Date</th>
<th>Response</th>
<th>Supplier Site</th>
<th>Award Amount</th>
<th>Purchasing Documents</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Higgins Back to School Kit</td>
<td>RFQ</td>
<td>3/2/18 8:31 AM</td>
<td>2018</td>
<td>CDW-130</td>
<td>USD 15,600.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BRT-40000364</td>
<td>RFQ</td>
<td>5/16/18 11:15 AM</td>
<td>5</td>
<td>CDW-130</td>
<td>USD 13,420.00</td>
<td>2000407</td>
<td></td>
</tr>
<tr>
<td>RFQ-40000305</td>
<td>RFQ</td>
<td>5/17/18 11:24 AM</td>
<td>0</td>
<td>CDW-130</td>
<td>USD 7,227.000</td>
<td>2000406</td>
<td></td>
</tr>
<tr>
<td>Higgins Back to School Kit</td>
<td>RFQ</td>
<td>5/17/18 10:59 AM</td>
<td>4</td>
<td>CDW-130</td>
<td>USD 4,487.77</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Request for Quote (RFQ)

Receiving an Invite for a Negotiation

The Scholastic Sourcing group has the ability to invite vendors to bid on projects through the Supplier Portal. If your organization is invited to a negotiation, you will receive an email as well as a notification in the Supplier Portal.

The email invitation will include a PDF overview of the project. There is also a link that will take you directly to the RFQ in the Supplier Portal.

Viewing the RFQ

You can view the RFQ by clicking on the link the email notification. Another option is to go to the Supplier Portal and navigate to the Negotiations tab. Click on the negotiation number in question.
This will bring up the RFQ cover page with the time remaining to respond displayed. On the left hand side of the RFQ, you will see links to the different components of the RFQ.

Click on the **Overview** link. This will bring up the Overview page, which has key dates tied to the RFQ. On the right hand side, you will find attachments to the RFQ. The attachment will have the requirements for the RFQ along with instructions, quantities, and any other relevant information.
Click on the **Lines** link. This will bring up the line items tied to the RFQ. In some cases, due to complex requirements, there will be one placeholder line visible with the advanced requirements included in an attachment.

---

**Creating a Response**

When you decide to bid on an RFQ, you must first acknowledge that you will participate. You can do this from the Negotiations dashboard by scrolling to the “Open Invitations” section. Highlight the negotiation, and click on the **Acknowledge Participation** button.
This will bring up the Acknowledge Participation popup. You can select Yes or No, and enter a comment to the Scholastic buyer.

At this point, if you refresh the Negotiations dashboard, you will see YES listed in the ‘Will Participate’ column. You can create your response by highlighting the Negotiation and clicking on the Create Response button.
Another way to create a response is to open the RFQ and click on the Create Response button on the upper right hand side

This will bring up the response page. Enter the quote expiration date, an internal quote number if you have one, and any notes to the buyer. You can also attach any correspondence by clicking on the + sign next to Attachments.
You can attach more than one file by clicking on the + sign.

Once you attach a file, it will show up on the main screen. You can remove the attachment by clicking on the X next to the file name. Hit Save and then Next.
This will bring you to the “Lines” screen. Enter unit costs for the lines along with a Promised Ship Date.

For most negotiations, the Scholastic buyer will give the supplier an option to create your own line by clicking on the + sign under **Create Alternate**. This is especially useful if you want to incorporate a unique idea or proposal.

On the Alternate Line screen, you are required to enter a description, response price, and response quantity. You can enter a note to the buyer and also attach files to the alternate line.
After hitting **Save and Close**, the alternate line will be added to the RFQ response.

Hit **Save and Next**. This will bring you to the Review screen, where you can view the response as a whole. There are tabs for the Overview and Lines. When you are ready to submit the response to Scholastic, hit **Submit**.

You will receive confirmation that the response was submitted.
Award Decision

After the Scholastic buyer receives all bids, they will award either the whole job, or part of the job.

If you are selected, you will receive an email notification as well as an Oracle notification confirming which lines of the negotiation were awarded to you. If you are not selected, it’s up to the Scholastic buyer if they want to inform the suppliers systematically that were not selected. You would receive a similar alert, but the awarded lines amount will be “0”.

Clicking on the notification will bring up the award decision. In the screenshot below, one line was awarded.

![Award Decision](image)
Here is a screenshot of an award decision where nothing was awarded:

Another way to view the outcome of the RFQ is to go to the Negotiations home screen. Scroll down to Completed Negotiations. The little green circle with a check mark indicates that the bid was awarded, while the note “No award” in the amount signifies that your bid was not accepted.
Purchase Orders (PO)

PO Notification

When a Scholastic purchase order is issued, you will receive an email notification with a PDF attachment.

If an acknowledgment is required, the email subject will include “Requires Acknowledgment”. A notification alert will also be displayed at the top of Supplier Portal to note an action is required.
When a “Revised” PO is received, the email subject will include the “Revision #”

Review PO Details
Open the attachment in the email to view a PDF of the purchase order. Additionally, on the “Orders” overview tab in the Supplier Portal, all recent PO’s will be listed under “Opened”. You will have the option of viewing a PDF, opening the order for acknowledgment, as well as updating the order with a confirmed promised ship date.
Acknowledge a PO

Some Scholastic POs will require a supplier acknowledgment within the Portal. The PO will not be considered “open” until the Supplier completes the acknowledgment process. If a PO requires acknowledgment, the email subject will note “Requires Acknowledgement”. You can acknowledge the PO from the link in the email or log into the supplier portal and click on the “Pending Acknowledgment” link in the Watch list.

Note: A notification alert will pop-up as well as a task in the “Work list”. While both of these serve as links to the PO, it is suggested to acknowledge an order by using the link in the “Watch List”, as this method is most efficient.

A “Manage Orders” screen will be displayed with all orders pending acknowledgement. Click on an order #.
The PO header and details will be displayed. At the top right of the screen, select the “Acknowledge PO” button.

You may need to acknowledge both the order (under “Terms”) and each Schedule line. You are given the option to “Accept” or “Reject”. Please only “Accept” the PO using this process. If there is something wrong with the order, please reach out to your Scholastic buyer via email or phone.

In the top right hand corner, hit “Submit”

Then hit “OK” and “Done” to close out of the order.

The acknowledgment has been sent back to Scholastic and the order status is now “Open”.

![Oracle logo]
Enter/Revise a Promised Ship Date for a Schedule

On every order, we send a “Requested Ship Date”. We expect that every supplier will respond with a “Promised Ship Date” confirming when you can ship. These dates are loaded into the Scholastic system for reporting purposes, so it’s important that they are populated for every order and kept up to date.

From the “Orders” or “Schedules” tab, select an order to edit:

This brings you to the PO screen. The top part contains the PO header information with your supplier information. The “Lines” and “Schedules” tabs at the bottom contain the PO detail.
In the previous screenshot, the requested ship date is 4/26/18. However, the promised ship date is blank. In order to enter a new promised ship date or revise an existing promised ship date, click the “Actions” button on the top right of the screen and select “Edit”.

A warning message pops up to confirm that any action will create a change order. Click “Yes”.

In the “Schedules” tab, enter a new promised ship date and a change reason if applicable.

Enter a description of the change order you made at the top of the PO and then hit “Submit”.

Note: Hitting “Save” will save your work, but will not send the updated date back to Scholastic. You must select “Submit”.

After hitting “submit”, a popup message confirms that your changes have been sent to Scholastic. We will reach out to you with any questions.
Manage Schedules
To search and view all orders and schedules, select the task button while in the Overview screen in the supplier portal.

It opens up a tab on the right side with a number of options. Under “Orders”, select “Manage Schedules”. 
The Manage Orders screen allows you to search all PO Schedules, open or closed. The default search is “All”, but you can search using a number of parameters, as well as setup custom searches. You can also easily tell which schedules don’t have a “Promised Ship Date” by sorting the field. In fact, all of the fields are sortable.

Order Life Cycle
When you select a PO to view or edit, the “Order Life Cycle” graph can be found on the top right of the screen. It is a graphical view of the dollar amount ordered, received, delivered, and invoiced. Select “View Details” for additional information.
The Order Life Cycle now displays a complete order summary including in-transit shipment information (pulled in from our OTM module), receipt dates, and invoice status.
Invoices

Create and Submit an Invoice

The Scholastic Supplier Portal allows you to submit invoices directly to Scholastic. Processing your invoices through the supplier portal will increase the speed that your payment is processed. In the task list, select “Create Invoice”.

In the “Create Invoice” section, select an order from the “Identifying PO” drop down list. This will populate most of the fields. Then enter your internal “Invoice Number” and today’s date. Under “Attachments”, click the + to upload a copy of your internal invoice for our records.
In the “Items” section, hit the “Select and add” button to choose the PO lines you’d like to add to the invoice.

Select the line(s) and hit “Apply”.

Then hit “OK”. The item(s) has been added to the invoice.

In the quantity field, enter the shipped quantity.

Note: If the shipped quantity exceeds 3% overage from the ordered quantity, the invoice will not processed. Please reach out to your Scholastic buyer to have the purchase order increased. Then the invoice can be created.
Tax
If tax is required, please add it as a “Miscellaneous Charge” towards the bottom of the screen. Our current module is not equipped to calculate tax. If you click the “Calculate Tax” button in the “Items” section, it will not calculate. This functionality will be available in the future.

Miscellaneous Charges
Hit the “Add” button under “Shipping and Handling” and select “Miscellaneous”. Enter an amount and description. When adding Tax, please specify the tax % in the description.

Note: Freight is not a viable option as all of our shipments should be booked through the Scholastic Logistics group via the OTM system.
Hit “Submit” to send the invoice to Scholastic

A pop-up message will confirm that the invoice has been submitted.
View Invoices

To search for all submitted invoices, on the Task Menu, select “View Invoices”

Select your “Supplier” name, and hit search. You can use the fields to narrow your search as well as create custom searches. You can see the Invoice Status, as well as a Payment Number to confirm that a payment has been made against your invoice. Please note that all of these columns can be sorted.
View Payments
To search for invoice payment status, on the Task Menu, select “View Payments”

Select your “Supplier” name, and hit search. You can use the fields to narrow your search as well as create custom searches. You can also see the payment status to confirm that a payment has been made. Select a “Payment Number” to see the complete details of the payment.
Complete payment detail will be displayed
Supplier Preferences

On the home page, select “Set Preferences”

Select “Regional” in the General Preferences list to review the option to update your date and time format, preferred number format, primary currency, and time zone.
Select “Save and Close” when finished.

Select “Language” to change the primary language of the website. The default is “American English”