Aras Portal 27

User Guide

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Copyright Information

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1 Introduction

1.1 Purpose

This user guide provides the required information for successfully using the Aras Portal 27 web application.

1.2 Scope

This document provides an overview of Aras Portal with functionalities related to Aras Supplier Management, document sharing, questionnaires, SCARs, contracts, negotiation requests, alerts, and notices within the Aras Portal.

1.3 Target Audience

The Aras Portal web application users are responsible for following the information provided in this document.

1.4 Feature Terms and Definitions

The following Feature terms and definitions are used in this document:

Term	Definition
Dashboard	Overview of recent activities and quick access to key features.
Supplier Management	Manage supplier information, including addresses, contacts, locations, and phone numbers.
Document Sharing	Share specific versions of documents or CAD documents with suppliers.
Questionnaires	Create, distribute, and manage questionnaires for suppliers.
SCARs (Supplier Corrective Action Requests)	Notify suppliers of issues and manage corrective actions.
Contracts	Manage contract details for purchased parts and services.
Negotiation Requests	Handle contract negotiations with suppliers.
Alerts and Notices	Communicate issues and notifications to suppliers.

2 Getting Started

2.1 Prerequisites

- Aras Portal credentials.
- Confirm the user account has the required permissions.

2.2 Logging In

1. Open the web browser and go to the Aras Portal URL.
2. Enter the username and password.
3. Click "Login" to access the portal.

Note: The Aras Portal URL is created by system administrators, and the URL should be retrieved from the OEM.

2.3 Logging Out

To log out, click the user icon in the main menu and select Logout.

3 Aras Portal Overview

The Aras Portal web application is designed to facilitate efficient management and communication between OEMs and suppliers. It provides tools for viewing supplier data, sharing documents, handling corrective actions, managing contracts, and more.

3.1 Using the Portal

3.1.1 Navigating the Dashboard

Upon logging in, the home page provides an access point to all items available to the supplier. It is the default view when logging in and can be accessed at any time by clicking the home button on the main menu of the Portal view.

3.1.2 Navigating using the Menu

All the items can be found using the navigation menu found in the top left corner.

Use the menu to access the different item types found in their TOC sections (Supplier, Documents, Questionnaires, SCARs, Contracts, Alerts and more)

Note: The organization of objects and the sections is controlled by TOC administration in Aras Innovator

3.1.3 My Discussions

Users can view all discussions on items in the Aras Portal with Visual Collaboration enabled. This feature enables users to participate in and track discussions related to specific items, ensuring that all relevant communication is easily accessible and organized in one place.

3.1.4 My InBasket

My InBasket view is a grid view that displays all the active and assigned workflow tasks. Workflow tasks can be viewed here, and work items can be accessed directly using the item links. It can be accessed at any time by clicking the My InBasket button on the main menu of the Portal view.

3.1.5 About

To locate the release information, click the user icon from the main menu and select About.

3.1.6 Searching Items

All items available from the navigation menu or the home screen can be searched using the default search grid.

- To sort the results of the search grid, click the column headers.
- To filter the search grid to find specific items, click the filter menu button to access the filter dialog.
- To open items from the search grid, click the menu button open related.
- To export the results to Excel, click the menu button Export Excel.
- To export the results to PDF, click the menu button Export PDF.

3.1.7 Editing Items

All items will display an edit button on the item menu.

- To edit the item, click the Edit button.
- If the user has the right to edit, the item will be locked, and two buttons will be displayed: Done and Discard.
- If the user does not have the right to edit, a permissions warning will display.
- After making changes, the item may be saved with the Save button.
- To exit the item without making changes, click Discard.

3.1.8 Refreshing Items

All items will display a refresh button on the item menu.

To refresh the item contents, click the refresh button.

3.1.9 Comment on Items

If the item has SSVC enabled, the comment icon will be present on the item menu

- To add a comment, click the comment icon.
- The Visual Collaboration side pane will allow users to enter text or attach files.
- To save, press the comment button.
- To search, refresh, or filter the messages, use the message menu.

3.2 Accessing Supplier Information

OEMs can capture details about suppliers such as main address, phone number, email, and company numbers. Suppliers may check this information is correct and inform OEM of any changes.

1. Go to Supplier Management > Suppliers or Home > Suppliers.
2. System displays Supplier Search Grid

3. Double-click on the supplier to view or edit their information.
   a. Or select supplier and click open related item from the grid menu.

Note: The Portal is security-controlled, so suppliers should only have access to their own supplier items.

3.3 Managing Documents

Document sharing allows OEMs to share documents and CAD documents with a supplier. Adding a document to the supplier-shared items will share specific versions of a Document or Cad Document with a supplier. Shared Documents can be found by accessing specific document types from the home screen, the documents section on the navigation menu, or the relationship tab Shared Items on a supplier item.

Note: When a new document version is created, it will **not** automatically float to the latest version. Only specific versions are shared.

1. Navigate to Main Menu > Documents.
2. Use filters to find and manage existing documents.
   - Or open supplier and navigate to the shared items page.
   - Or open the navigation menu Documents > Documents.
3. Select the Shared Item and double-click to open it.

3.4 Managing Parts

Suppliers can manage manufacturer parts provided by external manufacturers. This feature allows for comprehensive tracking and management of all parts supplied by external manufacturers, whether they are direct manufacturers, resellers, or distributors.

1. Navigate to Home Page > Manufacturing Parts.
2. Use filters to find and manage existing parts.
   - Or open the supplier and navigate to the parts page.
   - Or open the navigation menu Procurement > Manufacturer Parts.
3. Select the Manufacturer Part and double-click to open.

Note: The OEM maintains the Manufacturer's Part Item. Using Visual Collaboration, messages can capture any suggestions for modification.

3.5 Responding to Questionnaires

OEMs can create and distribute questionnaires to suppliers. Responses are entered through the Aras Portal. This feature allows for collecting valuable feedback from suppliers, which can be used to improve processes.

Note: If responding to a questionnaire, there will be a workflow activity in My InBasket for completion.

To view workflow activity:

1. Open MyInbasket
2. Find the Questionnaire

To answer the questionnaire

3. Open Questionnaire
   - Users can open the work item from the My InBasket activity by clicking on the item link.
     or
   - Go to Home > Questionnaires.
4. Select the questionnaire and double-click to open it.
5. Edit the Item and Enter the responses on the Questions and Responses tab.
6. Attach any appropriate attachments to the Attachments tab.
7. Save (users may return to change or complete responses at any time up to activity completion)

To Submit a Response to the questionnaire

1. Once complete, navigate to My InBasket.
2. Select the Activity.
3. Click the Complete Task button on the grid menu (or right-click complete)
4. The workflow completion dialog will be displayed.
5. Select the appropriate vote – Submit Response and then press Complete.
6. The workflow activity will no longer exist in My InBasket.

A supplier may complete the questionnaire or reject it. To reject:

1. Select the Activity.
2. Click the Complete Task button on the grid menu (or right-click complete)
3. Workflow completion dialog will be displayed.
4. Select the appropriate vote – Reject, input any comments for the reason, and click Complete.
5. The workflow activity will no longer exist in My InBasket.

Note: The OEM may ask for more information on where updates or corrections can be made after completion. The OEM may also resend a questionnaire to a supplier. The workflow activity will be reenabled in the supplier’s My InBasket, and the same steps for answering, rejecting, or responding can be followed.

3.6 Responding to SCARs

Users can track and negotiate contract changes between OEMs and Suppliers. This feature allows for the efficient management of negotiation processes, ensuring that all changes are documented and tracked.

Note: If responding to a SCAR, there will be workflow activity in My InBasket for completion.

To view workflow activity:

1. Open MyInbasket
2. Find the SCAR

To Accept the SCAR

1. Select the Activity.
2. Click the Complete Task button on the grid menu (or right-click complete)
3. Workflow completion dialog will be displayed.
4. Select the appropriate vote – Accepted and click Complete.
5. The lifecycle will be updated to reflect that the supplier is working on the SCAR (In Progress)

A supplier may accept the SCAR or reject it.

To reject:

1. Select the Activity.
2. Click the Complete Task button on the grid menu (or right-click complete)
3. Workflow completion dialog will be displayed.
4. Select the appropriate vote – Reject Issue, input any comments for the reason, and click Complete.
5. The workflow activity will no longer exist in My InBasket.

To edit the SCAR

1. Open a SCAR
   - Open the work item from My InBasket activity by clicking the item link.
     or
   - Go to Home > SCARs.
2. Select the SCAR and double-click to open it.
3. Edit the Item and fill in the appropriate fields on the form.
4. Add any affected parts on the Affected Parts tab (if not already completed by OEM)
5. Attach any appropriate attachments to the Files tab.
6. Save (users may return to change or complete the form at any time up to activity completion)

To finalize the SCAR

1. Select the Activity.
2. Click the Complete Task button on the grid menu (or right-click complete)
3. Workflow completion dialog will be displayed.
4. Select the appropriate vote – Implemented and click Complete.
5. The lifecycle will be updated to reflect that OEM is reviewing the implementation plan on the SCAR (In Review)
6. The workflow activity will no longer exist in My InBasket.
7. The OEM may choose to Close the SCAR or suggest a rework of the plan.

Note: The OEM may request a rework where updates or amendments can be made after completion. The OEM may also resubmit a SCAR to a supplier if it has been rejected. The workflow activity will be reenabled in the supplier’s My InBasket, and the same steps for answering, rejecting, accepting, and implementing can be followed.

3.7 Managing Contracts

Users can capture agreements or contracts between OEMs and Suppliers. This feature allows for the centralized management of all contracts.

1. Go to Documents > Contracts or Home > Contracts.
2. System displays Contracts Search Grid
3. Double-click the contract to view the information.
   Or select contract and click Open Related Item from the grid menu.

Note: The OEM maintains the contract item. Amendments will be processed through the Negotiation Request. Messages using Visual Collaboration can capture suggestions for modification.

3.8 Responding to Negotiation Requests

Users can track and negotiate contract changes between OEMs and Suppliers. This feature allows for the efficient management of negotiation processes, ensuring that all changes are documented and tracked.

Note: If responding to a Negotiation Request, there will be a workflow activity in My InBasket for completion.

To view workflow activity:

1. Open MyInbasket
2. Find the Negotiation Request

To view the Negotiation Request

1. Open a Negotiation Request
    - Users can open the work item from My InBasket activity by clicking the item link.
      or
    - Go to Home > Negotiation Requests.
2. Select the Negotiation Request and double-click to open it.
3. The contracts for negotiation can be viewed from the Contracts tab.

To negotiate terms of the Negotiation Request

1. Select the Activity.
2. Click the Complete Task button on the grid menu (or right-click complete)
3. Workflow completion dialog will be displayed.
4. Select the appropriate vote – Propose Terms (enter any appropriate comments) and then click Complete.
5. The lifecycle will be updated to reflect that OEM is reviewing the implementation plan on the Negotiation Request (In Progress)
6. The workflow activity will no longer exist in My InBasket.
7. The OEM may choose to Close the Negotiations or continue negotiations.

Note: A supplier may propose negotiation terms, ask for more information from the OEM, or reject the negotiation outright.

To ask for more information:

1. Select the Activity.
2. Click the Complete Task button on the grid menu (or right-click complete)
3. Workflow completion dialog will be displayed.
4. Select the appropriate vote – Ask for more information, input any comments, and then press Complete.
5. The workflow activity will no longer exist in My InBasket.

To reject:

1. Select the Activity.
2. Click the Complete Task button on the grid menu (or right-click complete)
3. Workflow completion dialog will be displayed.
4. Select the appropriate vote – Reject, input any comments for the reason, and click Complete.

5. The workflow activity will no longer exist in My InBasket.

Note:	The OEM may negotiate a contract where updates or amendments are made after completion. The OEM may also resubmit a negotiation request to a supplier if more information has been requested. The workflow activity will be reenabled in the supplier's My InBasket, and the same steps for proposing terms, rejecting them, or asking for more information can be followed.

3.9 Receiving a Buyer Notice

OEMs communicate issues and notify suppliers through Buyer Notices. Notices are viewed and acknowledged in the Aras Portal, ensuring suppliers are promptly informed of any issues or changes.

Note:	If users have received a Buyer's Notice, a workflow activity will be in My InBasket for acknowledgment.

To view workflow activity:

1. Open MyInbasket
2. Find the Buyer Notice

To view the Buyer Notice

1. Open a Buyer Notice
   - Users may open the work item from myInbasket activity by clicking the item link.
     or
   - Go to Home > Buyer Notices.
2. Select the Buyer Notice and double-click to open.
3. Any attachments can be found on the attachments tab.

To Acknowledge receipt of the Buyer Notice

1. Select the Activity.
2. Click the Complete Task button on the grid menu (or right-click complete)
3. Workflow completion dialog will be displayed.
4. Select the appropriate vote – Acknowledge Receipt and then click Complete.
5. The lifecycle will be updated to reflect that OEM is reviewing the implementation plan on the Buyer Notice (Acknowledged)
6. The workflow activity will no longer exist in My InBasket.

   A supplier may ask for more information from the supplier before acknowledging the receipt.

To ask for more information:

1. Select the Activity.
2. Click the Complete Task button on the grid menu (or right-click complete)
3. Workflow completion dialog will be displayed.
4. Select the appropriate vote – Ask for more information, input any comments, and click Complete.
5. The workflow activity will no longer exist in My InBasket.

Note:	The OEM may make changes after asking for more information than resubmit a Buyer Notice to a supplier. The workflow activity will be reenabled in the supplier's My InBasket, and the same steps for acknowledging or asking for more information can be followed.

3.10 Creating a Supplier Alert

Suppliers communicate issues to the OEM via Supplier Alerts. Users can create and submit alerts in the Aras Portal, ensuring that any issues are promptly reported and addressed.

Note:	Supplier Alerts are created in the portal and sent via My InBasket

Create Supplier Alert

1. Navigate to Main Menu > Supplier Alerts.
   - Or open supplier and navigate to the shared items page.
   - Or open the navigation menu Supplier Management > Supplier Alerts.
2. Click Add from the Search Grid.
3. Enter the relevant fields.
4. Click Save

Submit Supplier Alert to OEM.

1. Select the Activity.
2. Click the Complete Task button on the grid menu (or right-click complete)
3. Workflow completion dialog will be displayed.
4. Select the appropriate vote – Notify Buyer and click Complete.
5. The workflow activity will no longer exist in My InBasket.

Note:	The OEM may Ask for more information. The workflow activity will be reenabled in the supplier's My InBasket and made available for editing; the same steps for notifying the buyer can be followed.

3.11 Best Practices and Tips

Regularly review questionnaire responses and SCARs to maintain quality standards. Set up alerts to promptly inform OEMs of any critical updates or issues.