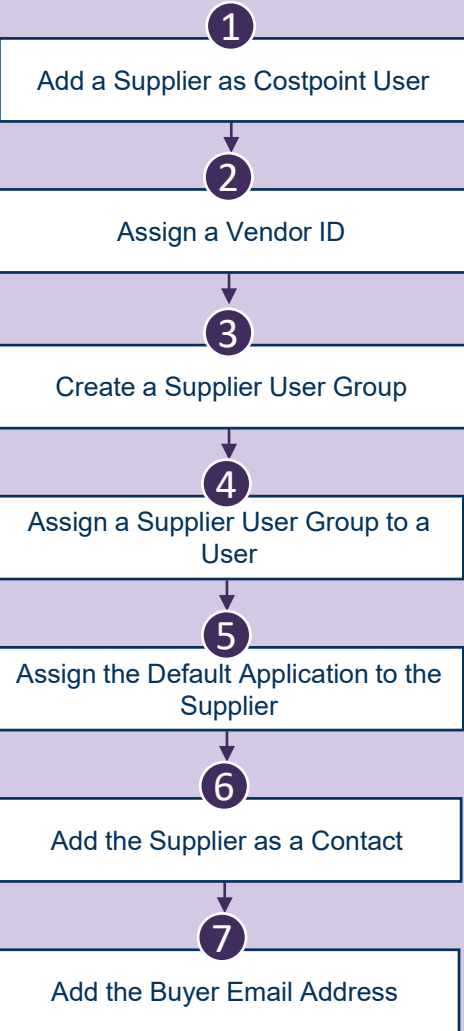


Set Up Supplier Portal User



FILELINEOPTIONSPROCESSHELP

Applied Technologies IncDelttek Costpoint

HomeStar3

Browse Applications > Materials > Supplier Portal > Dashboards/Actions > Supplier Portal Dashboard > Parameters | Reports

AvatarPower

Pending Supplier Action (across Purchase Orders)

New Orders28

Change Requests3

Change Request Rejected

Cancel Request3

Cancel Request Rejected

Number of PO/Delivery Schedule Lines

Past Due Deliveries

> 308

Upcoming Deliveries

<= 55

Pending Supplier Action (by Purchase Order)

PO	Rlse	PO Type	Buyer	PO Total Amt	Curr
AM022019-2	?	Purchase Order	Anne, Mitchell	5,000.00	USD
AM022119-1	?	Purchase Order	Anne, Mitchell	5,000.00	USD
AM022119-2	?	Purchase Order	Anne, Mitchell	4,000.00	USD
AM022119-3	?	Purchase Order	Anne, Mitchell	4,000.00	USD
?	?	Purchase Order	Anne, Mitchell	4,000.00	USD
?	?	Purchase Order	Anne, Mitchell	4,000.00	USD
?	?	Purchase Order	Anne, Mitchell	5.00	USD
?	?	Purchase Order	Ashley, Floyd A	0.00	USD
?	?	Subcontractor Agreement	Kansagra, Roopa	0.00	USD
?	?	Purchase Order	Conrad, Kelley	12,500.00	USD
?	?	Purchase Order	Conrad, Kelley	5,100.00	USD
?	?	Purchase Order	Ashley, Floyd A	5,250.00	USD
?	?	Purchase Order	Ashley, Floyd A	14,400.00	USD
?	?	Purchase Order	Ashley, Floyd A	3,475.00	USD
?	?	Purchase Order	Ashley, Floyd A	2,526.00	USD
?	?	Purchase Order	Ashley, Floyd A	2,400.00	USD
?	?	Purchase Order	Ashley, Floyd A	2,100.00	USD
?	?	Purchase Order	Ashley, Floyd A	500.00	USD
?	?	Purchase Order	Ashley, Floyd A	1,000.00	USD

Open Purchase Orders

PO	Rlse	Buyer	PO Total Amt
AM022019-2	?	Anne, Mitchell	5,000.00
AM022119-1	?	Anne, Mitchell	5,000.00
AM022119-2	?	Anne, Mitchell	4,000.00
AM022119-3	?	Anne, Mitchell	4,000.00
AM022219-1	?	Anne, Mitchell	4,000.00
AM022219-2	?	Anne, Mitchell	4,000.00
AM030619-1	?	Anne, Mitchell	5.00
AM030619-2	?	Anne, Mitchell	5.00
PO-02-0623	?	Ashley, Floyd A	324.80
PO-02-0624	?	Ashley, Floyd A	0.00 USD
PO-02-0625	?	Ashley, Floyd A	0.00 USD
PO-02-0626	?	Ashley, Floyd A	2,880.00 USD
PO-02-0627	?	Ashley, Floyd A	3,000.00 USD
PO-02-0628	?	Kansagra, Roopa	0.00 USD
PO-02-0629	?	Ashley, Floyd A	1,800.00 USD
PO-02-0630	?	Ashley, Floyd A	250.00 USD
PO-02-0631	?	Ashley, Floyd A	4,740.00 USD
PO-02-0632	?	Conrad, Kelley	585.00 USD
PO-02-0633	?	Conrad, Kelley	12,500.00 USD

In this click-thru, you will add a user either as supplier or buyer to enable them to access the Supplier Portal.

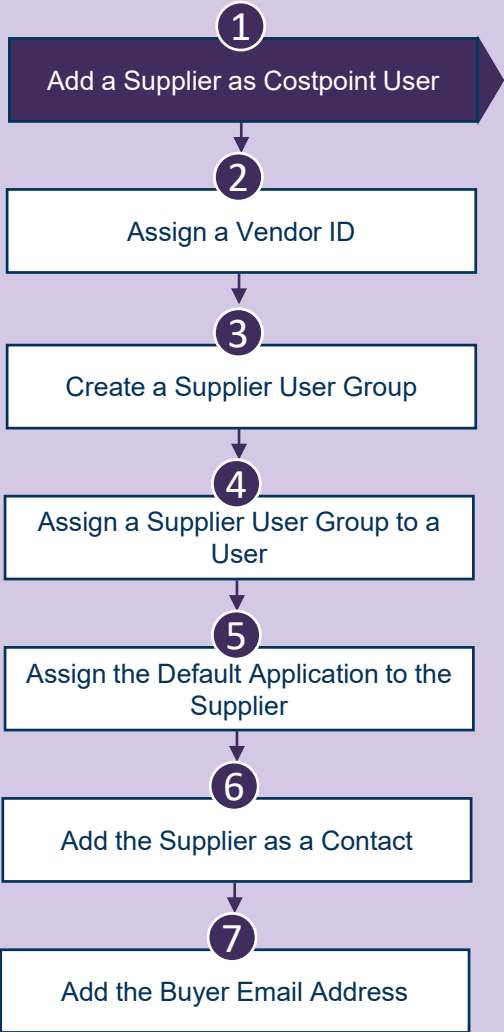
Click the numbered circles on the left to move to the first step in each phase.

Use the arrows or Pg Up/Down keys to proceed through each step.

Begin

Best viewed in IE or Adobe PDF Reader.

Set Up Supplier Portal User



FILE LINE OPTIONS PROCESS HELP Company 1 Deltak Costpoint

Browser Applications > Admin > Security > System Security > Manage Users

Identification

User ID * User Name *

Information Workflow Printing Defaults Authentication User Interface

User Information

Employee ID Phone Extension Locale ID Email Preferred Notification Mthd

Last Login Date

☒ Force Password Change
☐ Notify When Batch Job Is Completed
☐ Allow User to Override Batch Job Priority
☐ Can Report Issues From Application Screen

Preferences User Can Change

☐ Password
☐ Phone and Extension
☐ Name
☐ Default Company
☐ Can Change Email Notification
Default Company *

Company Access Assigned User Groups Module Rights Application Rights UI Profiles

Identification > Company

Company ID * Default Taxable Entity ID Org Security Group ID Warehouse Supplier Portal Vendor

Data Suppression

☐ Suppress Labor ☐ Suppress SSN
☐ Suppress Cost ☐ Suppress Price

Close

A On the Manage Users screen, assign a user ID and a user name to the supplier.

B Enter the email address for the Supplier Portal logged-in user.

Add the Buyer Email Address

A On the Company Access subtask, link the user to a vendor ID.

7 Add the Buyer Email Address

★  Browse Applications > Admin > Security > System Security > **Manage User Groups**

A Create a supplier user group.

[Assign Users to Group](#) [Module Rights](#) [Application Rights](#) [Active Directory Groups](#) [UI Profiles](#)

B Assign the Supplier Portal Module to the group.

Manage User Groups > Module Rights					
New	Copy ▼	Delete	Query ▼	□	×
Module *	Name	Module Rights *	Company *	Domain	
AR	Accounts Receivable	Full ▼	ALL	Accounting	▲
BD	Budgeting and ETC	Full ▼	ALL	Projects	
CO	Consolidations	Full ▼	ALL	Accounting	≡
EC	Engineering Change Notices	Full ▼	ALL	Materials	
FA	Fixed Assets	Full ▼	ALL	Accounting	
HT	Team Management	Full ▼	ALL	People	▼

→ SP	Supplier Portal	-Select- ▼			

Set Up Supplier Portal User

1

Add a Supplier as Costpoint User

2

Assign a Vendor ID

3

Create a Supplier User Group

4

Assign a Supplier User Group to a User

5

Assign the Default Application to the Supplier

6

Add the Supplier as a Contact

7

Add the Buyer Email Address

FILE LINE OPTIONS PROCESS HELP

Browse Applications > Admin > Security > System Security > Manage Users

Manage Users

ID *	Name *	Allow Saving of Personal Screen Configurations	Allow Screen Configuration Changes for UI Profiles	Employee ID	Phone	Extension	Default Locale	Locale Name	Email	Enable AutoComplete	Use Auto Position mode *	Deactivation Date	Date Password Changed	Last Login Date	Force Pas
001112	Simms, Brandon	<input checked="" type="checkbox"/>	<input type="checkbox"/>	32695					taneisha.blyden@gmail.com	<input checked="" type="checkbox"/>	Default		05/30/2018		
1	SLast1, jji	<input checked="" type="checkbox"/>	<input type="checkbox"/>	1						<input checked="" type="checkbox"/>	Default				
11222	LAST11222, FIRST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11222						<input checked="" type="checkbox"/>	Default				
11224	LAST11224, FIRST11224	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11224						<input checked="" type="checkbox"/>	Default				
2018001	LN 2018001, FN 2018001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2018001						<input checked="" type="checkbox"/>	Default		12/26/2018	05/28/2019	
2018002	LN 2018002, FN 2018002	<input checked="" type="checkbox"/>	<input type="checkbox"/>							<input checked="" type="checkbox"/>	Default		01/17/2019	01/21/2019	
2018003	LN 2018003, FN 2018003	<input checked="" type="checkbox"/>	<input type="checkbox"/>							<input checked="" type="checkbox"/>	Default		01/17/2019	01/25/2019	
2018004	LN 2018004, FN 2018004	<input checked="" type="checkbox"/>	<input type="checkbox"/>							<input checked="" type="checkbox"/>	Default		01/21/2019	01/25/2019	
2018005	LN 2018005, FN 2018005	<input checked="" type="checkbox"/>	<input type="checkbox"/>							<input checked="" type="checkbox"/>	Default		01/21/2019	01/22/2019	
2018006	LN 2018006, FN 2018006	<input checked="" type="checkbox"/>	<input type="checkbox"/>							<input checked="" type="checkbox"/>	Default		01/21/2019	01/22/2019	

The Content Management license is required to attach documents via the Supplier Portal. An additional user group is also recommended to limit the access of each vendor within the document management system.

Company Access Assigned User Groups Module Rights Application Rights UI Profiles

Identification > Assigned User Groups

User Group *	User Group Name	Company *
EVERYONE	Every One	ALL

Identification > Company

Company ID * 1

Default Taxable Entity ID AIRBOAT

Org Security Group ID

Warehouse

Supplier Portal Vendor

Data Suppression

☐ Suppress Labor ☐ Suppress SSN

☐ Suppress Cost ☐ Suppress Price

A

On the Assigned User Groups subtask, assign the user group to the user to ensure that only the applicable module is accessible. The EVERYONE user group will be assigned by default as well.

Set Up Supplier Portal User

Add a Supplier as Costpoint User

Assign a Vendor ID

Create a Supplier User Group

Assign a Supplier User Group to a User

Assign the Default Application to the Supplier

Add the Supplier as a Contact

Add the Buyer Email Address

FILE LINE OPTIONS PROCESS HELP

Company 1 (Sample Env. Name 123 - C71MQC011Q1) Deltek Costpoint

Browse Applications > Admin > Security > System Security > Manage Users

Identification

New Copy Delete 1 of 2,126 Existing Table Query

User ID * 001111 User Name * Doe II, John

Information Workflow Printing Defaults Authentication **User Interface**

User Interface Settings

- ☒ Allow Saving of Personal Screen Configurations
- ☐ Allow Screen Configuration Changes for UI Profiles
- ☒ Enable AutoComplete
- Use Auto Position mode * Default

Default Application ID SPDSP Application Name SUPPLIER PORTAL DASHBOARD

Company Access Assigned User Groups Module Rights Application Rights UI Profiles

Identification > Assigned User Groups

User Group *	
EVERYONE	Every One

If the default application is set to Supplier Portal (SPDSP), the user will be taken directly to the Supplier Portal Dashboard upon login.

Identification > Company

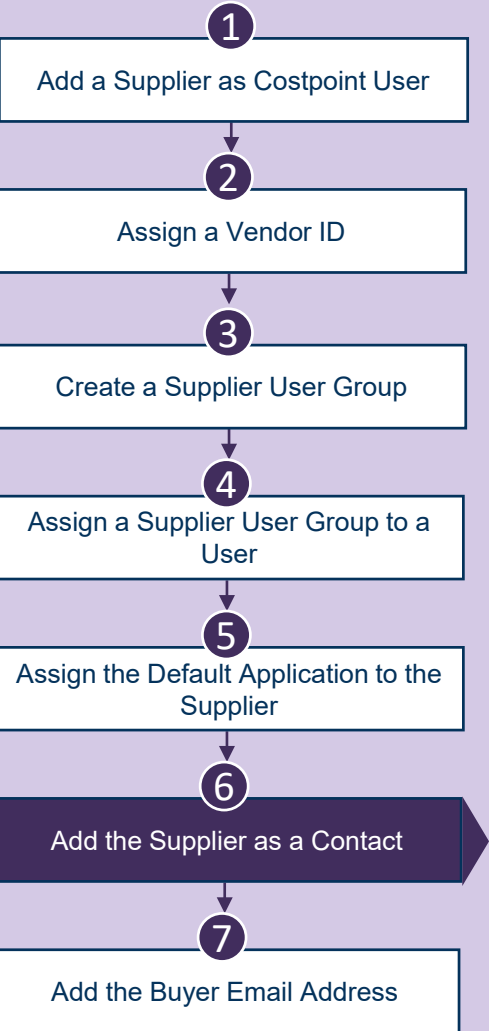
New Copy Delete 1 of 1 Existing Table Query

Company ID *	1	Company 1
Default Taxable Entity ID	1	SuperTech, Inc.
Org Security Group ID		
Warehouse		
Supplier Portal Vendor		

Data Suppression

- ☐ Suppress Labor ☐ Suppress SSN
- ☐ Suppress Cost ☐ Suppress Price

Set Up Supplier Portal User



FILE LINE OPTIONS PROCESS HELP Company 1 Deltek Costpoint

Browse Applications > Accounting > Accounts Payable > Vendors > Manage Vendors

Identification

Vendor ID: 00001 Name: GTE Telecom at Tyson Location: VA

Long Name: GTE Telecom at Tyson Vendor Group: GROUP2

Vendor Web Site: Customer Account: CRC

Employee: DSM1

Time Collection: Expense Class: GovWin IQ Company ID: DUNS Number: CAGE Code: Entry User: LEITKAMC Date: 10/26/1996 APPROVED

1099's: ☒ Print 1099-MISC Form Type: NONEMP Tax ID: 456-789123 1099 Name: GTE Telecom at Tyson Password:

Vendor Status: ☒ Active ☐ Give Warning ☐ Inactive ☐ Hold Payments ☐ Payroll Vendor

Subcontractor Management: ☐ Subcontractor Vendor Employee Approval Group:

Identification > Addresses

Address Code *	Address Line 1	Address Line 2	Address Line 3	City	State/Province	Postal Code	Country	Ship ID
EFT-ADDR	123 West Palm			Manassas	VA	22110	USA	
GTE-PMT1	88 GTE West Park Drive							

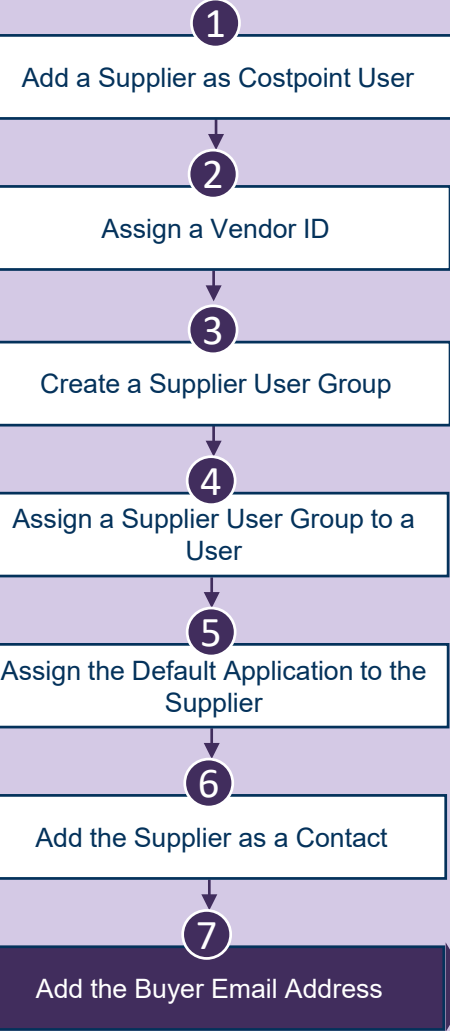
On the Manage Vendors screen, set up a supplier as contact for each applicable address of an associated vendor.

Identification > Addresses > Contacts

Address Code: GTE-PMT1

Line *	Last Name	First Name	Title	Phone Number	Fax Number	Other Number	Notes	Email Address
1	GTE	Johnny	CEO	703-666-7777	703-888-0000	703-555-GTE2	can call 24 hours	
2	Dole	John	CFO	214-999-0000	214-444-5555		10:00 to 5:00	

Set Up Supplier Portal User



FILE LINE OPTIONS PROCESS HELP Company 1 (Sample Env. Name 123 - C71MQCO11Q1) Delttek Costpoint

Browse Applications > Admin > Security > System Security > Manage Users

Identification User ID * 001111 User Name * Doe II, John

Information Workflow Printing Defaults Authentication User Interface

User Information

Employee ID 001111

Phone

Extension

Locale ID

Email

Preferred Notification Mthd Email

On the Manage Users screen, add an email address to the buyer information for use as the From email when communicating with a supplier.

Company Access Assigned User Groups Module Rights Application Rights UI Profiles

FILE LINE OPTIONS PROCESS HELP Company 1 (Sample Env. Name 123 - C71MQCO11Q1) Delttek Costpoint

Browse Applications > People > Employee > Basic Employee Information > Manage Employee Information

Identification Employee * 16421501 Name 1Last Suffix, 1First 1 Contractor

Employee HR Data Address/Contact Timesheet Defaults Product Interface User Data Notes

Mailing

E-Mail Addresses

Work 1employee@deltek.com

Home 1employee@home.com

On the Manage Employee Information screen, add an email address to the buyer information for use as the To email when communicating with a supplier.

Postal Code 14344

Country USA

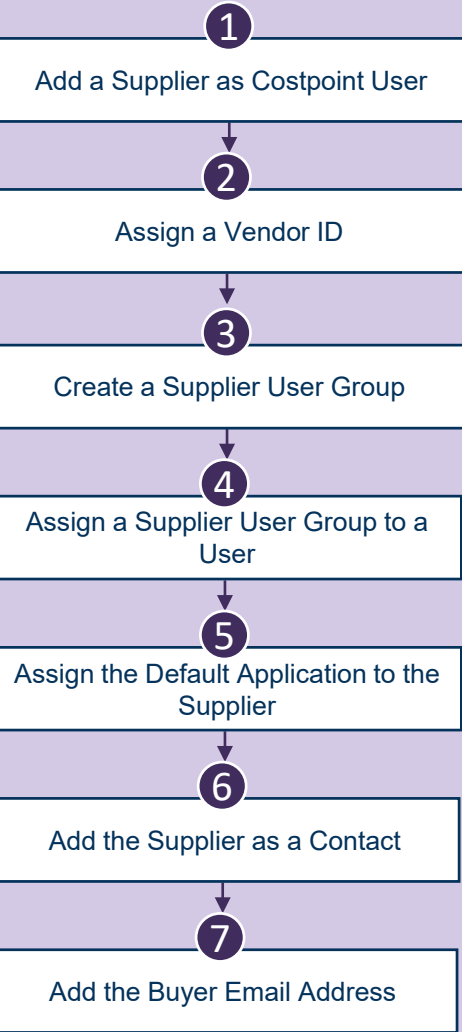
Emergency Contact

Contact Name 1 Elliott Phone Number 6556565 Relationship spouse

Contact Name 2 Efraym Phone Number 9876543 Relationship mother

Salary Details Leave Beginning Balances Leave Allowances Details Taxes Deductions Contributions Bank Info Savings Bonds User-Defined Info Additional Addresses Citizenship Phone Additional Default Pay Types Employment History

Set Up Supplier Portal User



FILELINEOPTIONSPROCESSHELP

Applied Technologies IncDelttek Costpoint

HomeStar3

Browse Applications > Materials > Supplier Portal > Dashboards/Actions > Supplier Portal Dashboard > Parameters | Reports

Pending Supplier Action (across Purchase Orders)

Past Due Deliveries

Upcoming Deliveries

Pending Supplier Action (by Purchase Order)

PO	Rise	PO Type	Buyer	PO Total Amt	Curr
AM022019-2	0	Purchase Order	Anne, Mitchell	5,000.00	USD
AM022119-1	0	Purchase Order	Anne, Mitchell	5,000.00	USD
AM022119-2	0	Purchase Order	Anne, Mitchell	4,000.00	USD
AM022119-3	0	Purchase Order	Anne, Mitchell	4,000.00	USD
AM022219-1	0	Purchase Order	Anne, Mitchell	4,000.00	USD
AM022219-2	0	Purchase Order	Anne, Mitchell	4,000.00	USD
AM030619-2	0	Purchase Order	Anne, Mitchell	5.00	USD
PO-02-0624	0	Purchase Order	Ashley, Floyd A	0.00	USD
PO-02-0626	0	Subcontractor Agreement	Kansagra, Roopa	0.00	USD
PO-02-0633	0	Purchase Order	Conrad, Kelley	12,500.00	USD
PO-02-0634	0	Purchase Order	Conrad, Kelley	5,100.00	USD
PO-02-0635	0	Purchase Order	Ashley, Floyd A	5,250.00	USD
	0	Purchase Order	Ashley, Floyd A	14,400.00	USD
		Purchase Order	Ashley, Floyd A	3,475.00	USD
		Purchase Order	Ashley, Floyd A	2,526.00	USD
		Purchase Order	Ashley, Floyd A	2,400.00	USD
		Purchase Order	Ashley, Floyd A	2,100.00	USD
		Purchase Order	Ashley, Floyd A	500.00	USD
		Purchase Order	Ashley, Floyd A	1,000.00	USD

Open Purchase Orders

PO	Rise	Buyer	PO Total Amt	Curr
AM022019-2	0	Anne, Mitchell	5,000.00	USD
AM022119-1	0	Anne, Mitchell	5,000.00	USD
AM022119-2	0	Anne, Mitchell	4,000.00	USD
AM022119-3	0	Anne, Mitchell	4,000.00	USD
AM022219-1	0	Anne, Mitchell	4,000.00	USD
AM022219-2	0	Anne, Mitchell	4,000.00	USD
AM030619-1	0	Anne, Mitchell	5.00	USD
AM030619-2	0	Anne, Mitchell	5.00	USD
PO-02-0623	0	Ashley, Floyd A	324.80	USD
PO-02-0624	0	Ashley, Floyd A	0.00	USD
PO-02-0625	0	Ashley, Floyd A	0.00	USD
PO-02-0626	0	Ashley, Floyd A	2,880.00	USD
PO-02-0627	0	Ashley, Floyd A	3,000.00	USD
PO-02-0628	0	Kansagra, Roopa	0.00	USD
PO-02-0629	0	Ashley, Floyd A	1,800.00	USD
PO-02-0630	0	Ashley, Floyd A	250.00	USD
PO-02-0631	0	Ashley, Floyd A	4,740.00	USD
PO-02-0632	0	Conrad, Kelley	585.00	USD
PO-02-0633	0	Conrad, Kelley	12,500.00	USD

This concludes the Set Up Supplier Portal User click-thru.