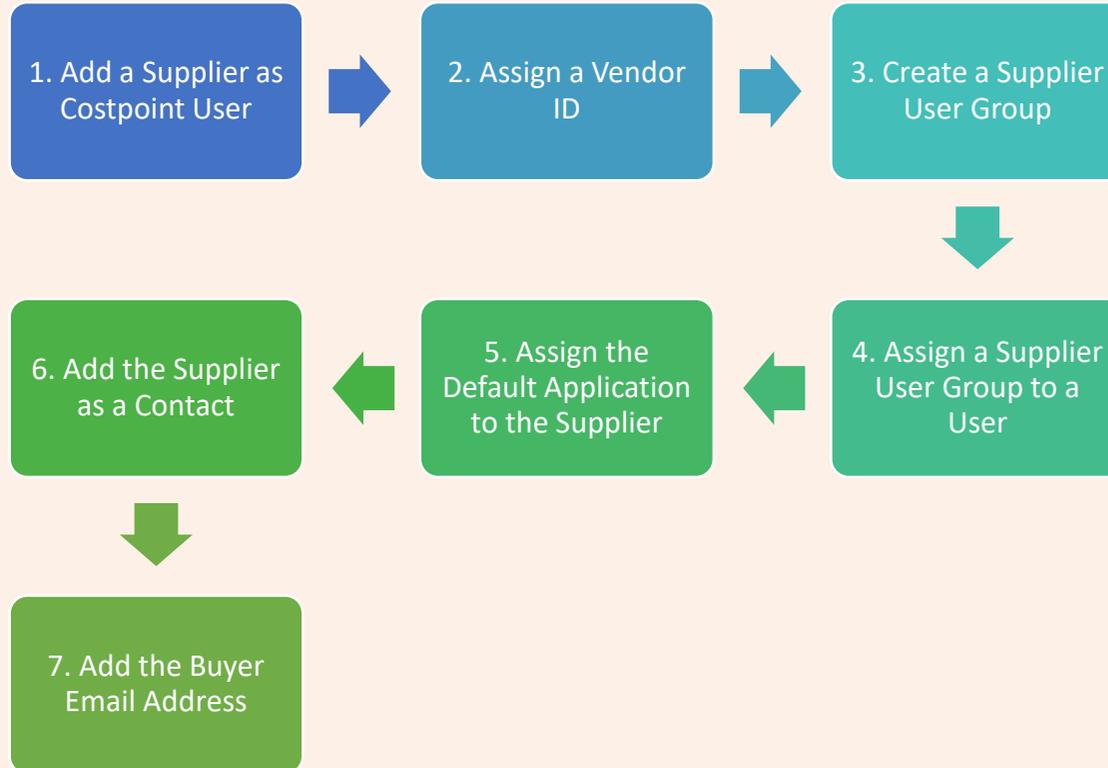


# Set Up Supplier Portal User Quick Steps

The high-level steps required to add a user either as supplier or buyer to enable them to access the Supplier Portal.



## Navigation:

- Use the **PAGE DOWN** key to proceed to the next slide.
- Use the **PAGE UP** key to return to a prior slide.



**Identification** New Copy Delete 1 of 1 New Table Query

User ID\*  User Name\*

**A**

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

Information Workflow Printing D

**User Information**

Employee ID

Phone

Extension

Locale ID

Email

Preferred Notification Mthd

**Status**

Deactivation Date

Date Password Changed

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**

Name

Default Company

Can Change Email Notification

Phone and Extension

Can Add New FIDO Device

Password

Default Company\*

[Company Access](#) [Assigned User Groups](#) [Module Rights](#) [Application Rights](#) [UI Profiles](#) [FIDO/Biometric Devices](#)

**B**

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

**Identification > Company** New Copy Delete 1 of 1 New Table Query

Company ID\*

Default Taxable Entity ID

Org Security Group ID

Warehouse

Supplier Portal Vendor

**Data Suppression**

Suppress Labor  Suppress SSN

Suppress Cost  Suppress Price

Suppress AP Tax ID

Close

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

→ Identification New Copy Delete 1 of 1 New Table Query

User ID\* USER1235 User Name\* John Supplier

Information Workflow Printing Defaults Authentication User Interface

User Information Status Preferences User Can Change

Employee ID \_\_\_\_\_ Deactivation Date \_\_\_\_\_

Phone 5556339636 \_\_\_\_\_

Extension \_\_\_\_\_

Locale ID \_\_\_\_\_

Email JSupplier@vendor.com \_\_\_\_\_

Preferred Notification Mthd Email and IM \_\_\_\_\_

Job Is Completed \_\_\_\_\_

Job Batch Priority \_\_\_\_\_

From Application Screen \_\_\_\_\_

Name  
 Default Company  
 Can Change Email Notification  
 Phone and Extension  
 Can Add New FIDO Device  
 Password  
 Default Company\* \_\_\_\_\_

Company Access Assigned User Groups Module Rights Application Rights UI Profiles FIDO/Biometric Devices

The Supplier Portal Dashboard and the Manage Supplier Actions screens will filter POs based on the **Org Security Group ID** assigned to the supplier on the Manage Users screen.

→ Identification > Company New Copy Delete 1 of 1 New Table Query

Company ID\* 1 COMPANY TELTEK, INC. SS

Default Taxable Entity ID \_\_\_\_\_

Org Security Group ID GRP1 \_\_\_\_\_

Warehouse \_\_\_\_\_

Supplier Portal Vendor SP001 \_\_\_\_\_

Supplier Portal \_\_\_\_\_

Data Suppression

Suppress Labor  Suppress SSN  
 Suppress Cost  Suppress Price  
 Suppress AP Tax ID

Close

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

Manage User Groups

User Group ID *	Name *	Active Directory ID (sAMAccountName)
STD_CNTR_OPP_MGR	Contract Opportunity Manager	
STD_CNTR_SUBK_CLRK	Contract Subcontract Clerk	
STD_CST_ACCT	Cost Accountant	
SUPPLIER	SUPPLIER PORTAL	
SUPPLIER_APPLE	Supplier Portal Apple	
SUPPLIER_PORTAL	Supplier Portal users	

Assign Users to Group    Module Rights    Application Rights    Active Directory Groups    UI Profiles

Module List

Module	Name	Domain
PR	Payroll	People
RC	Receiving	Materials
RE	Resources	Contracts
RP	Resource Planning	Planning
RU	Routings	Materials
SM	Subcontractor Management	Projects
SP	Supplier Portal	Materials
SS	Security	Admin
SY	System Administration	Admin

Manage User Groups > Module Rights

Module *	Name	Module Rights *	Company *	Domain
SP	Supplier Portal	Full	1	Materials

Manage User Groups > Assign Users to Group

User *	Name	Com
AFSUPPLIER	Ashley Supplier	
AMSUPPLIER	SUPPLIER, ANNE	
AMSUPPLIER1	SUPPLIER11, AMY	1
NASH-USER	Holl, Komarbornn	1
SUPPLIERAF	Supplier Ashley	1
TEST6	Ashley	1
UXSUPPLIER	Munoz, Frances	1
UXSUPPLIER2	Ashley Floyd	1

A Create a supplier user group.

B Assign the Supplier Portal module SP with full rights to the group.

3. Create a Supplier User Group > Steps A and B

[Home](#) [Star](#) [2](#) Browse Applications > Admin > Security > System Security > Manage Users

**Identification**

[New](#) [Copy](#) [Delete](#) [1 of 1 New](#) [Table](#) [Query](#)

User ID \* 
 User Name \*

[Information](#) [Workflow](#) [Printing Defaults](#) [Authentication](#) [User Interface](#)

**User Information**

Employee ID

Phone

Extension

Locale ID

Email

Preferred Notification Mthd

**Status**

**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.**

Allow User to Override Batch Job Priority

Can Report Issues From Application Screen

**Preferences User Can Change**

Name

Default Company

Can Change Email Notification

Phone and Extension

Can Add New FIDO Device

Password

Default Company \*

[Company Access](#) [Assigned User Groups](#) [Module Rights](#) [Application Rights](#) [UI Profiles](#) [FIDO/Biometric Devices](#)

**Identification > Assigned User Groups**

<input checked="" type="checkbox"/>	User Group *	User Group Name	Company *
<a href="#">→</a>	SUPPLIER	SUPPLIER PORTAL	1
<a href="#">→</a>	EVERYONE	Every One	1

[Close](#)

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.

**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 and cannot be removed from the Supplier users. If you have any modules, applications, active directory groups, or UI profiles added to the EVERYONE user group, you will have to change this structure to a new User Group to avoid these applications and modules from being viewable by the Supplier users.



Identification New Copy Delete 1 of 1 New Table Query

User ID \*  User Name \*

Information Workflow Printing Defaults Authentication **User Interface**

User Interface Settings

- Allow Saving of Personal Screen Configurations
  - Allow Screen Configuration Changes for UI Profiles
  - Allow to Enter Navigation
  - Enable AutoComplete
- Use Auto Position mode\*

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

Default Application ID  Application Name

Identification > Assigned User Groups New Copy Delete Query

<input type="checkbox"/>	User Group *	User Group Name	Company *
<input type="checkbox"/>	SUPPLIER	SUPPLIER PORTAL	1
<input type="checkbox"/>	EVERYONE	Every One	1
<input type="checkbox"/>			

Close

5. Assign the Default Application to the Supplier

Identification

Vendor ID: SP001      Name\*: Supplier Portal Vendor      Location:

Header Defaults Notes

Long Name\*: Supplier Portal Vendor      Vendor Group:      1099's:  Print 1099-MISC Form  
 Vendor Web Site:      Customer Account:      Type: -None-  
**Vendor Status**  
 Active       Hold Payments  
 Give Warning       Payroll Vendor  
 Inactive  
 Vendor Approval: APPROVED

**GovWin IQ Company Information**  
 GovWin IQ Company ID:      Last GovWin IQ Synch:      Last GovWin IQ Analyst Update:  
 Do Not Refresh      Refresh from IQ

**Subcontractor Management**  
 Subcontractor      Vendor Employee Approval Group:      Entry: User: CPSUPERUSER      Date: 09/20/2019      Password:

Identification > Addresses

Address Code *	Address Line 1	Address Line 2	Address Line 3	City	State/Province	Postal Code	Country	Ship ID	Ship ID Description	Payment Address *	Order Address *	Phone Number	Fax Number	Other Number	Email Address	Congressional District Code	Sales/Use Tax Code	Sales/Use Tax Description	Password	Ship ID Active	US EFT Active	Non-US EFT Active
0011	1155 West Elm st			Cleveland		44105	USA			Default	Yes									<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A

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

Identification > Addresses > Contacts

Address Code: 0011

Line *	Last Name	First Name	Title	Phone Number	Notes	Email Address
1	Frances	Munoz				rosemariemunoz@deltek.com
2	Floyd	Ashley				ashleyfloyd@deltek.com
3	Supplier	John				JSupplier@vendor.com

User ID\*  User Name\*

Information Workflow Printing Defaults Authentication User Interface

User Information

Employee ID

Phone

Extension

Locale ID

Email

Preferred Notification Mthd  Email

Preferences User Can Change

- Name
- Default Company
- Can Change Email Notification
- Phone and Extension
- Can Add New FIDO Device
- Password

Default Company\*

[Company Access](#) [Assigned User Groups](#) [Module Rights](#) [Application Rights](#) [UI Profiles](#) [FIDO/Biometric Devices](#)

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

Employee\*  Name   Contractor

Employee Info HR Data Address/Contact Time

Mailing Address

Line 1

Line 2

Line 3

City

State/Province

Postal Code

Country

E-Mail Addresses

Work

Home

Emergency Contact

Phone Number  Relationship

Phone Number  Relationship

[Contributions](#) [Bank Info](#) [Savings Bonds](#) [User-Defined Info](#) [Additional Addresses](#) [Citizenship](#) [Phone](#) [Additional Default Pay Types](#) [Employment History](#)

**B** 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.

7. Add the Buyer Email Address > Steps A and B

Pending Supplier Action (across Purchase Orders)



This concludes the Set Up Supplier Portal User Quick Steps.

0  
Number of PO/Delivery Schedule Lines

1  
0 4 8 12 16 20 24 28 32 36 40 44 48 52 56  
Number of PO/Delivery Schedule Lines

Purchase Order Invoices/Vouchers dashpart parameters

Invoice	Invoice Date	Invoice Amt	Currency	PO
<a href="#">P041807-11</a>	05/31/2007	165.00	USD	P041807-11
<a href="#">432497</a>	12/01/2013	550.00	USD	PO-10690
<a href="#">432497</a>	11/30/2013	550.00	USD	PO-10690
<a href="#">543</a>	07/23/2013	1,575.00	USD	PO-10726
<a href="#">AD-PO00334</a>	03/02/2020	6,097.05	USD	AD-PO00334
<a href="#">AD-SC00032</a>	03/18/2020	4,551.00	CAD	AD-SC00032
<a href="#">AD-SC20000</a>	03/25/2020	3,042.00	USD	AD-SC20000
<a href="#">AD-SC20001</a>	03/25/2020	7,956.00	USD	AD-SC20001
<a href="#">AD-SC20002</a>	03/25/2020	5,382.00	USD	AD-SC20002
<a href="#">AD-SC20001-1</a>	03/25/2020	7,020.00	USD	AD-SC20001
<a href="#">AD-SC20001-2</a>	03/25/2020	7,020.00	USD	AD-SC20001
<a href="#">AD-SC20002-1</a>	03/25/2020	8,190.00	USD	AD-SC20002
<a href="#">AD-SC20002-2</a>	03/25/2020	1,010.00	USD	AD-SC20002

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