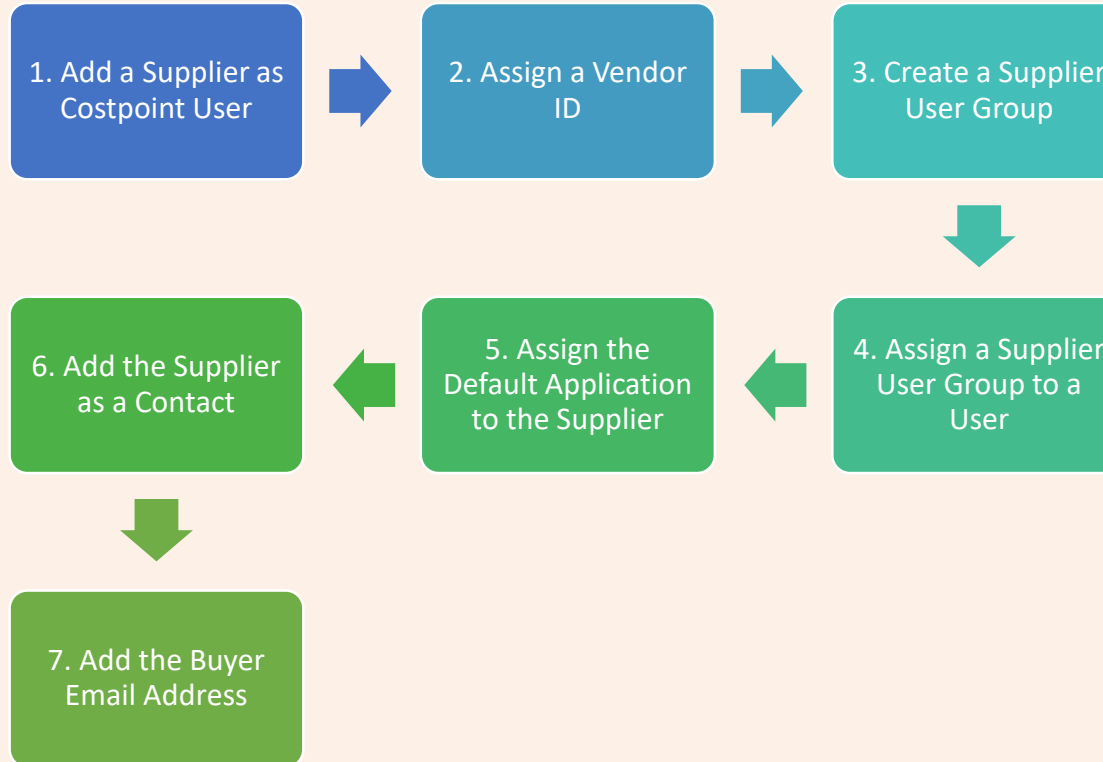


Set Up Supplier Portal User Quick Steps

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.



Browse Applications > Planning > Administration > System Security > Manage Users

→ 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

Email

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 *

B

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

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

→ 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

1. Add a Supplier as Costpoint User > Steps A and B

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

Manage User Groups

New Copy Delete Query

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	

A Create a supplier user group.

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

New Copy Delete Query

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

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

Manage User Groups > Assign Users to Group

New Copy Delete Query

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

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

Identification

User ID * USER1235 User Name * John Supplier

Information Workflow Printing Defaults Authentication User Interface

User Information

Employee ID

Phone 5556339636

Extension

Locale ID

Email JSupplier@vendor.com

Preferred Notification Mthd Email and IM

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.

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

User Group *	User Group Name	Company *
SUPPLIER	SUPPLIER PORTAL	1
EVERYONE	Every One	1

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.

Close



→ 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 *

Default Application ID Application Name

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

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

Identification > Assigned User Groups New Copy Delete Query

	User Group *	User Group Name	Company *
→	SUPPLIER	SUPPLIER PORTAL	1
→	EVERYONE	Every One	1
→			

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: Vendor Web Site: Customer Account: Employee: DUNS Number: UEI Number: CAGE Code: Time Collection Expense Class:

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

Vendor Approval: APPROVED

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

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

Vendor Employees Vendor Classification Currencies Subcontractor Info Credit Card Info Addresses Default Expense Accounts VAT Info CIS Info User-Defined Info

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"/>

Contacts EFT Info (Non-US) EFT Info (US)

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

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



Identification

User ID* User Name*

Information Workflow Printing Defaults Authentication User Interface

User Information

Employee ID
Phone
Extension
Locale ID
Email
Preferred Notification Mthd

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.

Preferences User Can Change

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



Identification

Employee* Name ☐ Contractor

Employee Info HR Data Address/Contact Time

Mailing Address

Line 1
Line 2
Line 3
City
State/Province
Postal Code
Country

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.

E-Mail Addresses

Work
Home

Emergency Contact

Phone Number Relationship
Phone Number Relationship

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

Pending Supplier Action (across Purchase Orders)

New Orders

Change Requests

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