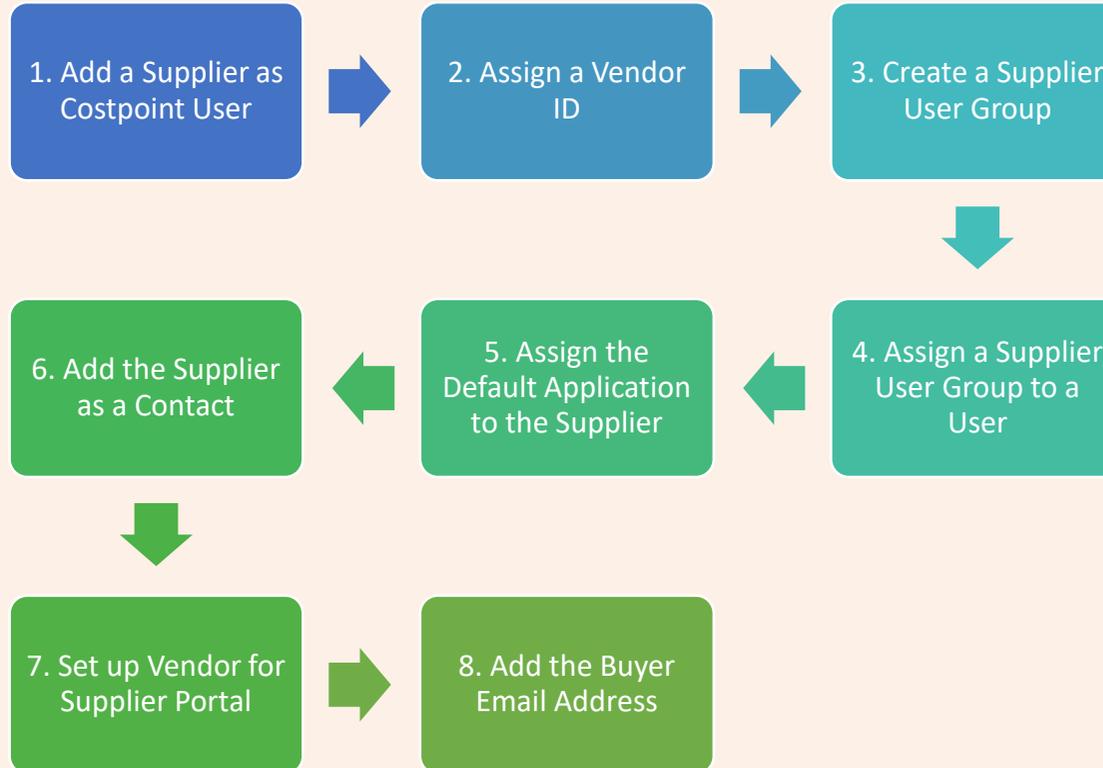


# Set Up Supplier Portal User Quick Steps

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 Status Preferences User Can Change

Employee ID   
Phone   
Extension   
Locale ID   
Email   
Preferred Notification Mthd

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

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

Identification > Company [New] [Copy] [Delete] [1 of 1 New] [Table] [Query]

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

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



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

### 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

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

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

De

Da

La

**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

**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 \*

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

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

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 New Copy Delete Approval 1 of 1 Existing Table Query

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

Header Defaults Notes

Long Name\*: Supplier Portal Vendor      Vendor Group: \_\_\_\_\_

Vendor Web Site: \_\_\_\_\_      Customer Account: \_\_\_\_\_

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: \_\_\_\_\_

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

Identification > Addresses New Copy Delete Form Query

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/vendor as a contact for each applicable address of the associated vendor.

Identification > Addresses > Contacts New Copy Delete Form

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

Vendor ID Name\* Location

Pay Vendor

Allow Edits to Pay Vendor on Voucher  Separate Check

Terms\*   eProcurement Vendor

Pay When Paid

Allow Auto-Vouchering for POs

**Supplier Portal Enabled**

Enable Digital Signature

Accounts Description

A/P\*  A/P 02000.1

Cash\*  30 - CASH ACCOUNT- 01000-010.1

Memo for Blank Laser Checks Only

Shipping

FOB

Ship Via

A

Select the **Supplier Portal Enabled** check box on the Manage Vendors screen to enable that vendor for the Supplier Portal. If the **Supplier Portal Enabled** check box is selected, the **Enable Digital Signature** check box can also be selected to allow that vendor to use a digital signature to approve invoices associated to them.

Identification > Addresses

Address Code\*

Address Line 1

Address Line 2

Address Line 3

City

State/Province  Postal Code

Country

Ship ID

Email Address

Congressional District Code

Sales/Use Tax Code

Password

Ship ID Active  US EFT Active  Non-US EFT Active

Order Address\*

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 Tim

Mailing Address

Line 1

Line 2

Line 3

City

State/Province

Postal Code

Country

E-Mail Addresses

Work

Home

Emergency Contact

Phone Number  Relationship

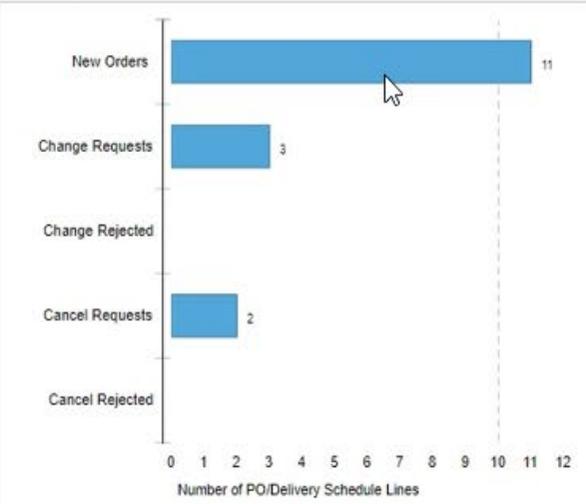
Phone Number  Relationship

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.

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

Pending Supplier Action (across Purchase Orders)



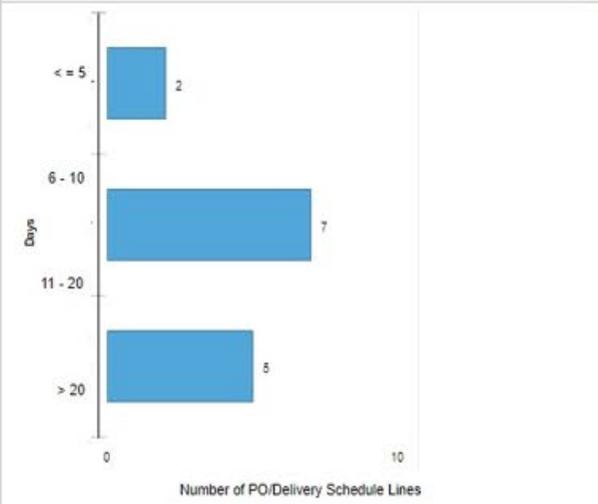
Past Due Deliveries



Subcontractor Invoices/Vouchers



Upcoming Deliveries



This concludes the Set Up Supplier Portal User Quick Steps.

Pending Supplier Action (by Purchase Order)

PO	Rise	PO Type	Buyer	PO Total Amt	Curr	DPAS
0-ADEV...	0	Subcontr...	Asaka, L...	0.00	USD	
0-ADEV...	0	Purchas...	Asaka, L...	0.00	USD	
012621-1	0	Purchas...	Asaka, L...	120.00	USD	
030521-1	0	Purchas...	Asaka, L...	135.00	USD	
032019-1	0	Purchas...	Asaka, L...	135.00	USD	
032521-1	0	Purchas...	Asaka, L...	750.00	USD	Y
033021-1	0	Purchas...	Asaka, L...	290.00	USD	Y
040721-1	0	Purchas...	Asaka, L...	250.00	USD	Y
041221-2	0	Purchas...	Asaka, L...	44.00	USD	Y
063020-1	0	Subcontr...	Asaka, L...	5,250.00	USD	
063920-1	0	Purchas...	Asaka, L...	150.00	USD	
1000000...	0	Purchas...	DOMIN...	13,445.80	USD	
1370153-1	0	Subcontr...	Asaka, L...	20,372.40	USD	
1370153-2	0	Purchas...	Asaka, L...	13,617.87	USD	
2020-05-12	0	Purchas...	Asaka, L...	100.00	USD	
2020-05-18	0	Purchas...	Asaka, L...	50.00	USD	
2444234...	0	Purchas...	Asaka, L...	50.00	USD	
2444234...	0	Purchas...	Asaka, L...	26.25	USD	
2444234...	0	Purchas...	Asaka, L...	150.00	USD	

Pending Supplier Action (by Request for Quotes)

PO	Rise	PO Type	Buyer	PO Total Amt	Curr	DPAS
0-ADEV...	0	Subcontr...	Asaka, L...	0.00	USD	
0-ADEV...	0	Purchas...	Asaka, L...	0.00	USD	
0-ADEV0016	0	Purchas...	Asaka, Leslie S C.P.A.	0.00	USD	
0-ADEV0031	0	Purchas...	Asaka, Leslie S C.P.A.	8,143.02	USD	
01-AD00004	0	Purchas...	Asaka, Leslie S C.P.A.	924.00	USD	
012621-1	0	Purchas...	Asaka, Leslie S C.P.A.	120.00	USD	Y
030521-1	0	Purchas...	Asaka, Leslie S C.P.A.	135.00	USD	
032019-1	0	Purchas...	Asaka, Leslie S C.P.A.	135.00	USD	
032521-1	0	Purchas...	Asaka, Leslie S C.P.A.	750.00	USD	Y
033021-1	0	Purchas...	Asaka, Leslie S C.P.A.	290.00	USD	Y
040721-1	0	Purchas...	Asaka, Leslie S C.P.A.	250.00	USD	Y
041221-2	0	Purchas...	Asaka, Leslie S C.P.A.	44.00	USD	Y
063020-1	0	Subcontr...	Asaka, Leslie S C.P.A.	5,250.00	USD	
063920-1	0	Purchas...	Asaka, Leslie S C.P.A.	150.00	USD	
1000000000	0	Purchas...	DOMINGO, ANNABELLE B	13,445.80	USD	
1370153-1	0	Subcontr...	Asaka, Leslie S C.P.A.	20,372.40	USD	
1370153-2	0	Purchas...	Asaka, Leslie S C.P.A.	13,617.87	USD	
2020-05-12	0	Purchas...	Asaka, Leslie S C.P.A.	100.00	USD	
2020-05-18	0	Purchas...	Asaka, Leslie S C.P.A.	50.00	USD	

Pending Supplier Action (by Request for Quotes)

RFQ	Buyer	Quote	Quote Reqd Date	Status
040821-1	Asaka, Leslie S C.P.A.	Q040821-1		Partially Quoted
041521-2	Asaka, Leslie S C.P.A.	Q041521-2		Partially Quoted
041521-6	Asaka, Leslie S C.P.A.	Q041521-6		Partially Quoted
RFQ-T105	Asaka, Leslie S C.P.A.			New
RFQ070921B	Asaka, Leslie S C.P.A.	QT02		Partially Quoted
RFQ071121B	Asaka, Leslie S C.P.A.	QT03		Partially Quoted
RFQ071321A	Asaka, Leslie S C.P.A.	QT04		Partially Quoted
RFQ1000227	Asaka, Leslie S C.P.A.	VQ 032421B	03/24/2021	Partially Quoted
RFQ1000244	Asaka, Leslie S C.P.A.	VQ043021-0		Partially Quoted
RFQ1000253	Asaka, Leslie S C.P.A.			New
RFQ1000255	Asaka, Leslie S C.P.A.			New
RFQ1000260	Asaka, Leslie S C.P.A.	VQT0709B		Partially Quoted
RFQ1000261	Asaka, Leslie S C.P.A.	VQT0709C		Partially Quoted
RFQA-00062	MILLARD, ANNE M	051221-2		Quote not Submitted
RFQA-00062	MILLARD, ANNE M	051221-1		Quote not Submitted
WVC071421A	Asaka, Leslie S C.P.A.	QT071421A		Partially Quoted