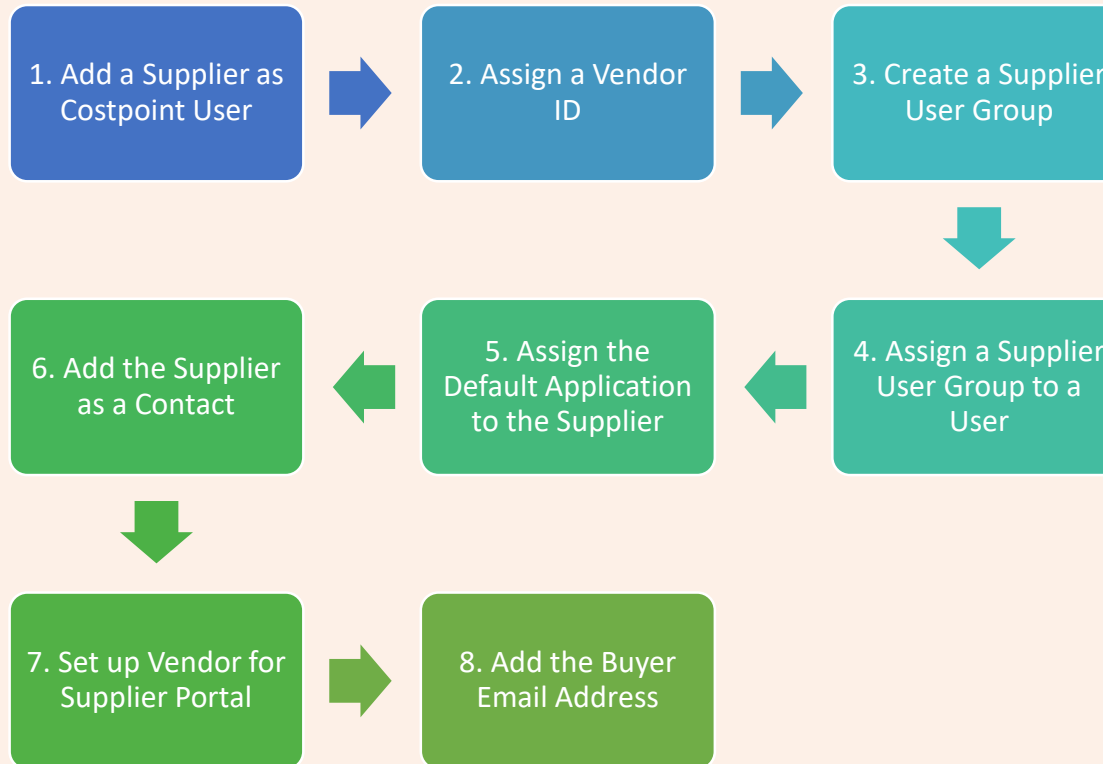


Set Up Supplier Portal User Quick Steps

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

Information	Workflow	Printing Defaults	Authentication	User Interface	
-------------	----------	-------------------	----------------	----------------	--

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.

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	

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	Company *
AFSUPPLIER	Ashley Supplier	
AMSUPPLIER	SUPPLIER, AMNE	
AMSUPPLIER1	SUPPLIER11, AMY	1
NASH-USER	Holl, Komarbohn	1
SUPPLIERAF	Supplier Ashley	1
TEST6	Ashley	1
UXSUPPLIER	Munoz, Frances	1
UXSUPPLIER2	Ashley Floyd	1

Annotations:

- A** Create a supplier user group.
- B** Assign the Supplier Portal module SP with full rights to the group.

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.

☐ 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

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 * USER1235 User Name * John Supplier

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

Default Application ID SPDSP Application Name SUPPLIER PORTAL DASHBOARD

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 Synchrony: Last GovWin IQ Analyst Update:

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



Identification

Vendor ID Name* Location

Header Defaults Notes

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*



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.

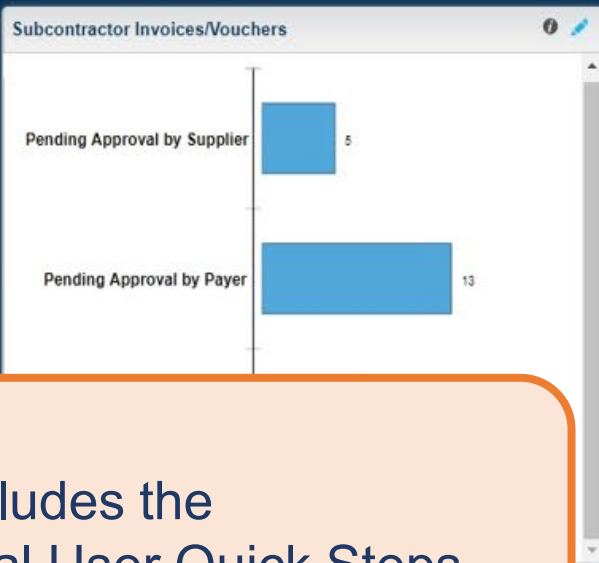
E-Mail Addresses

Work
Home

Emergency Contact

Phone Number Relationship
Phone Number Relationship

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



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...	Q	Subcontr...	Asaka, L...	0.00	USD	
0-ADEV...	Q	Purchas...	Asaka, L...	0.00	USD	
012621-1	Q	Purchas...	Asaka, L...	120.00	USD	
030521-1	Q	Purchas...	Asaka, L...	135.00	USD	
032019-1	Q	Purchas...	Asaka, L...	135.00	USD	
032521-1	Q	Purchas...	Asaka, L...	750.00	USD	Y
033021-1	Q	Purchas...	Asaka, L...	290.00	USD	Y
040721-1	Q	Purchas...	Asaka, L...	250.00	USD	Y
041221-2	Q	Purchas...	Asaka, L...	44.00	USD	Y
063020-1	Q	Subcontr...	Asaka, L...	5,250.00	USD	
063920-1	Q	Purchas...	Asaka, L...	150.00	USD	
1000000...	Q	Purchas...	DOMIN...	13,445.80	USD	
1370153-1	Q	Subcontr...	Asaka, L...	20,372.40	USD	
1370153-2	Q	Purchas...	Asaka, L...	13,617.87	USD	
2020-05-12	Q	Purchas...	Asaka, L...	100.00	USD	
2020-05-18	Q	Purchas...	Asaka, L...	50.00	USD	
2444234...	Q	Purchas...	Asaka, L...	50.00	USD	
2444234...	Q	Purchas...	Asaka, L...	26.25	USD	
2444234...	Q	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...	Q	Subcontr...	Asaka, L...	0.00	USD	
0-ADEV...	Q	Purchas...	Asaka, L...	0.00	USD	
0-ADEV0016	Q	Subcontr...	Asaka, Leslie S C.P.A.	0.00	USD	
0-ADEV0031	Q	Subcontr...	Asaka, Leslie S C.P.A.	8,143.02	USD	
01-AD00004	Q	Subcontr...	Asaka, Leslie S C.P.A.	924.00	USD	
012621-1	Q	Purchas...	Asaka, Leslie S C.P.A.	120.00	USD	
030521-1	Q	Purchas...	Asaka, Leslie S C.P.A.	135.00	USD	
032019-1	Q	Purchas...	Asaka, Leslie S C.P.A.	135.00	USD	
032521-1	Q	Purchas...	Asaka, Leslie S C.P.A.	750.00	USD	Y
033021-1	Q	Purchas...	Asaka, Leslie S C.P.A.	290.00	USD	Y
040721-1	Q	Purchas...	Asaka, Leslie S C.P.A.	250.00	USD	Y
041221-2	Q	Purchas...	Asaka, Leslie S C.P.A.	44.00	USD	Y
063020-1	Q	Subcontr...	Asaka, Leslie S C.P.A.	5,250.00	USD	
063920-1	Q	Purchas...	Asaka, Leslie S C.P.A.	150.00	USD	
1000000000	Q	Purchas...	DOMINGO, ANNABELLE B	13,445.80	USD	
1370153-1	Q	Subcontr...	Asaka, Leslie S C.P.A.	20,372.40	USD	
1370153-2	Q	Purchas...	Asaka, Leslie S C.P.A.	13,617.87	USD	
2020-05-12	Q	Purchas...	Asaka, Leslie S C.P.A.	100.00	USD	
2020-05-18	Q	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