Table of Contents

Introduction

The Contact Directory allows you to associate your employees who function as contacts for CPS supplier portal. You are allowed to create multiple contacts in the Contact Directory. Contacts that are obsolete can be end dated.

The contacts are provided with two different kinds of roles called "Business Administrator" and "Regular". Both Business Administrator and Regular users are allowed to add new contact information in the Contact Directory.

Prerequisites

- Supplier user should have access to the portal

Navigation

CPS Supplier Portal (Supplier Access) → Home Page → Admin (Tab)

Contact Directory

The Contact Directory page in Admin tab contains contact and user related information for your supplier account. This page displays the below information:

Contact Directory functionality allows the users to perform the below actions:

- Create a new contact (optionally request Portal access for the new contact)
- Update an existing contact
- Inactivate a contact

The below screen will be displayed when clicked on contact directory.

Create a New Contact

As a supplier user, you can create new contacts using the self-service functionality. Follow the below steps to add a new contact:

Step	Action
1.	Click the **Create Button**. **Create**
3.	You'll be redirected to the "Add Contact" page
4.	Enter all applicable information into the applicable fields (see screen below). Note: Check '**Create User Account**' if you wish to create a login username for an individual in your organization An auto generated message will be sent to your email as well as the newly requested user's account with a randomly generated password.

The following fields must be entered for new contacts:
- First Name / Last Name
- Job Title (i.e., Director, Vice President, Principal, Manager, Supervisor, etc.)
- Email Address
- Phone Area Code
- Phone Number

User Account: If the new contact is a person in your organization who needs access to the Supplier Portal, you can request to create a Supplier Portal account for this user by selecting the "Create User Account for this Contact" checkbox.

From there, the screen will update as below:

The "Username" field will be filled with the email address for the contact entered above.

Once the new contact is added, the new contact will receive login credentials and a temporary password for the Supplier Portal via email.

Update an Existing Contact – Contact Information

Follow the below steps to update an existing contact:

Step	Action
1.	Click on the **Contact Directory** hyperlink.
2.	Click the **Update** icon.
3.	You'll be redirected to the "Update Contact" page

ORACLE® iSupplier Portal

Navigator ▼   Favorites ▼   Home Logout Preferences Help Diagnostics

Admin: Profile Management: Contact Directory >
Update Contact
* Indicates required field   Cancel   Apply

Contact Title	[dropdown]	* Phone Area Code	222
* First Name	Smith	* Phone Number	1112222
Middle Name		Phone Extension	
* Last Name	John	Alternate Phone Area Code	
Alternate Name		Alternate Phone Number	
* Job Title	Manager	Fax Area Code	
Department		Fax Number	
* Email Address	js@xyz.com	Inactive Date	
Url			(example: 28-Feb-2020 19:45:00)

User Account Information

Username **JS@XYZ.COM**   Inactive Date [____]   ☐ Reset Password
                                        (example: 28-Feb-2020)

User Notifications

☐ Certification Reminders

Responsibilities

Select All | Select None

Select	Responsibility	Application
☑	CPS Supplier Portal (Supplier Access)	iSupplier Portal

User Access Restrictions

If no Supplier Sites or Contacts are specified, the user will be able to access all the data for this supplier.

Supplier Restriction

Suppliers
XYZ Corp

                                                              Cancel   Apply

Home Logout Preferences Help Diagnostics

About this Page   Privacy Statement   Copyright (c) 2006, Oracle. All rights reserved.

Step	Action
4.	Enter all applicable updates into the applicable fields. An auto generated message will be sent to the updated address you provided.

**Note:** If you wish to update the Username, you will need to create a new account with the new email address.

Update an Existing Contact - Add Business Administrator Access

When a new user is added through 'Contact Directory', the user will have "Regular" access by default. If the user needs "Business Administrator" access in order to maintain and update your organization's details, you will need to add the "Business Administrator" role to the Contact's User Account.
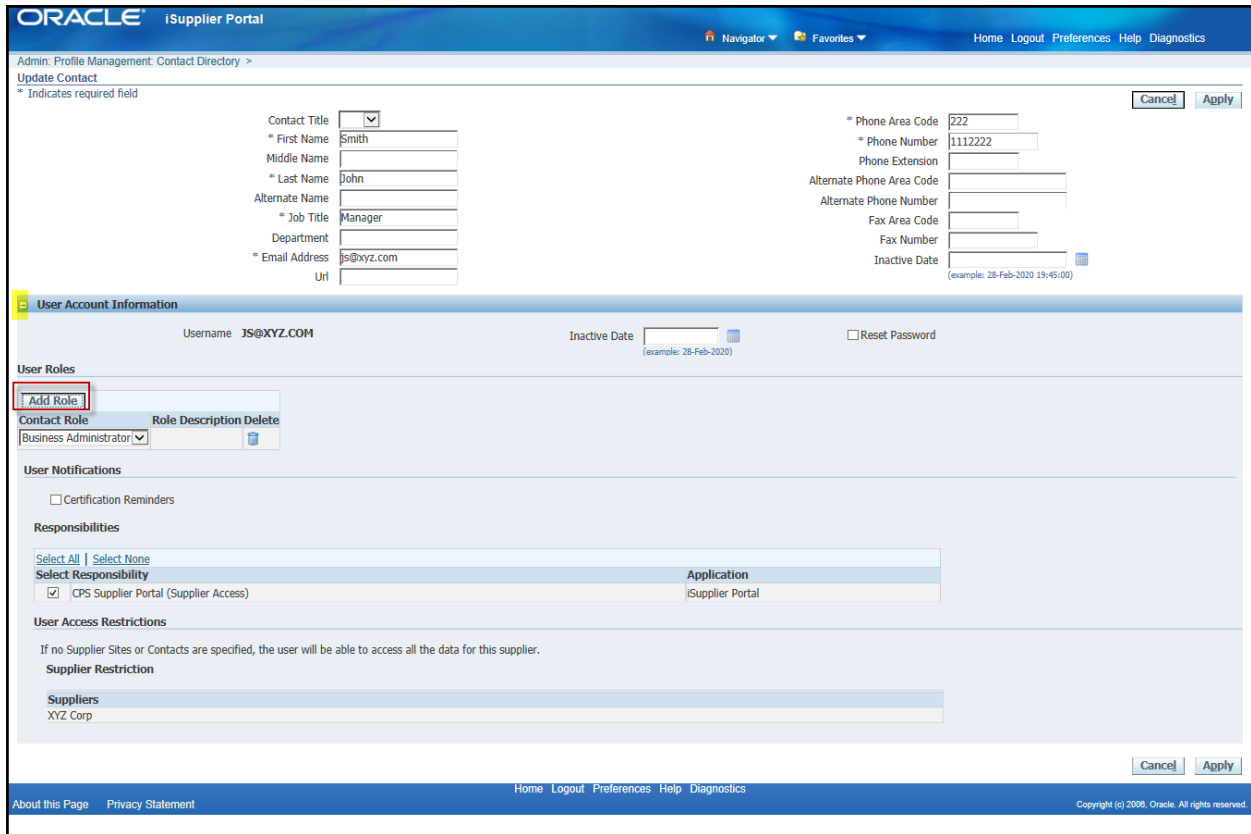
Note: "Business Administrator" access can only be assigned to a contact by other "Business Administrator" users. "Regular" users cannot add "Business Administrator" access to another user.

If you would like to add "Business Administrator" access to an existing contact, you can do so using the following steps:

Step	Action
1.	Click on the **Update** icon on the "Contact Directory" page (see screen below).
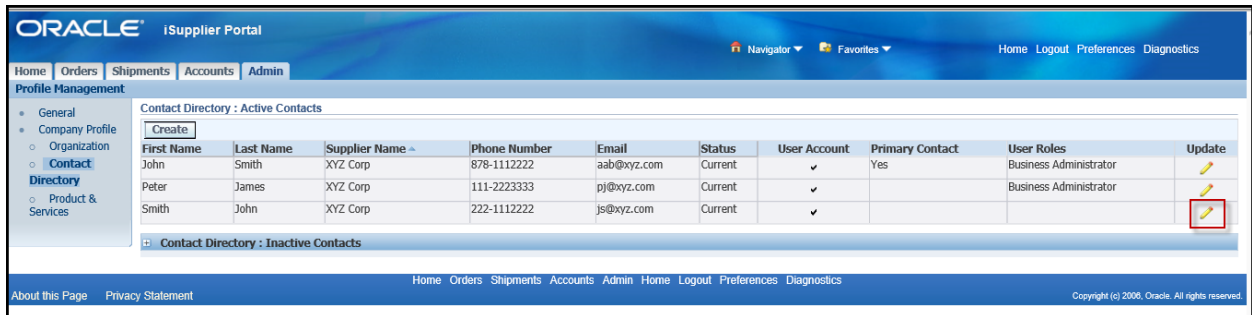
Step	Action
2.	On the "Update Contact" page, click the **+** sign to expand the User Account section (see screen below).
3.	Once there, click on the **Add Role** button. You will see the "Business Administrator" role getting added.
4.	Click on the **Apply** button to save the change.

Update an Existing Contact – Remove Business Admin Access

If the user needs to be removed from "Business Administrator" privileges from your supplier account, you will be able to remove it by following below steps.

Note: "Admin" access for a user can only be removed by other "Business Administrator" or "Billing Administrator" users.

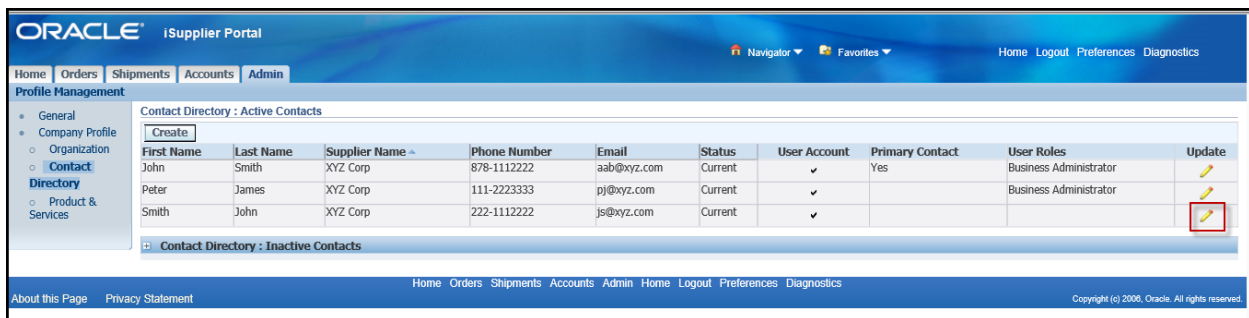| Step	Action
1.	Click the **Update** icon on the "Contact Directory" page (see screen above).
2.	On the "Update Contact" page, click the **+** sign to expand the User Account section.
3.	Click the **Delete** icon next to the "Administrator" role to remove "Admin" access.
4.	Click on 'Apply' button to save the change.

Update an Existing Contact - Add Billing Administrator Access

CPS is currently piloting a new Upload Invoice function with a select group of vendors, and for those vendors, all "Business Administrator" users will have access to this new functionality. However, there may be users in your organization who should only have access to upload invoice information and not access to edit the organization's business details. For that reason, if there is a user who only needs access to upload invoice information, you will need to add the new "Billing Administrator" role to the Contact's User Account.

Note: "Billing Administrator" access can only be assigned to a contact by other "Billing Administrator" or "Business Administrator" users. "Regular" users cannot add "Billing Administrator" access to another user.

If you would like to add "Billing Administrator" access to an existing contact, you can do so using the following steps:

Step	Action
1.	Click on the **Update** icon on the "Contact Directory" page (see screen below).

Step	Action
2.	On the "Update Contact" page, click the **+** sign to expand the User Account section (see screen below).
3.	Once there, click on the **Add Role** button. Select the "Billing Administrator" role from the drop down.
4.	Click on the **Apply** button to save the change.

Update an Existing Contact – Remove Billing Admin Access

If a user needs to be removed from his or her current "Billing Administrator" privileges from your supplier account, you will be able to remove it by following below steps.

Note: The Billing access for a user can only be removed by other "Business Administrator" or "Billing Administrator" users.

Step	Action
1.	Click the **Update** icon on the "Contact Directory" page (see screen above).
2.	On the "Update Contact" page, click the **+** sign to expand the User Account section.
3.	Click the **Delete** icon next to the "Billing Administrator" role.

4.	Click on 'Apply' button to save the change.

Inactivate a Contact

If a contact no longer works for your organization or otherwise needs their account inactivated, you can inactive their account through the following steps:

Step	Action
1.	Click the **Update** icon on the "Contact Directory" page (see screen above).
2.	On the "Update Contact" page, click the **+** sign to expand the User Account section.
3.	In the "Update Contact" section, click the **Calendar** icon to select an "Inactive Date" (see screen below).
4	In the "User Account Information" section, click the **Calendar** icon to select an "Inactive Date" (see screen below).
5.	Click on the **Apply** button to save the change.
6.	A "Warning" message will appear at the top of the screen. Click the **Confirm** button if you want to proceed with Inactivating the contact and their User Account (see

Note: You can view all your inactivated contacts on the "Contact Directory" page, under the "Contact Directory: Inactive Contacts" section.