



# CPS Supplier Portal

## Manage Contacts and User Roles

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## **CPS Supplier Portal Manage Contacts and User Roles**

### **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)



# CPS Supplier Portal

## Manage Contacts and User Roles

### 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.

ORACLE iSupplier Portal

Home Orders Shipments Accounts Admin

Profile Management

- General
- Company Profile
- Organization
- Contact
- Directory
- Product & Services

Contact Directory : Active Contacts

Create

First Name	Last Name	Supplier Name ▲	Phone Number	Email	Status	User Account	Primary Contact	User Roles	Update
John	Smith	XYZ Corp	878-1112222	aab@xyz.com	Current	✓	Yes	Business Administrator	
Peter	James	XYZ Corp	111-2223333	pj@xyz.com	Current	✓		Business Administrator	
Smith	John	XYZ Corp	222-1112222	js@xyz.com	Current	✓			

Contact Directory : Inactive Contacts

Home Orders Shipments Accounts Admin Home Logout Preferences Diagnostics

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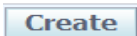


# CPS Supplier Portal

## Manage Contacts and User Roles

### 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 <b>Create Button</b> . 
3.	You'll be redirected to the "Add Contact" page
4.	Enter all applicable information into the applicable fields (see screen below).  Note: Check ' <b>Create User Account</b> ' 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



# CPS Supplier Portal Manage Contacts and User Roles

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:

**ORACLE iSupplier Portal**

Home Orders Shipments Accounts Admin

Admin: Profile Management: Contact Directory >

**Add Contact**

\* Indicates required field

Contact Title	<input type="text"/>	* Phone Area Code	<input type="text" value="222"/>
* First Name	<input type="text" value="Parker"/>	* Phone Number	<input type="text" value="2221111"/>
Middle Name	<input type="text"/>	Phone Extension	<input type="text"/>
* Last Name	<input type="text" value="Peter"/>	Alternate Phone Area Code	<input type="text"/>
Alternate Name	<input type="text"/>	Alternate Phone Number	<input type="text"/>
* Job Title	<input type="text" value="Supervisor"/>	Fax Area Code	<input type="text"/>
Department	<input type="text"/>	Fax Number	<input type="text"/>
* Email Address	<input type="text" value="pp@xyz.com"/>	Inactive Date	<input type="text" value="example: 28-Feb-2020 19:45:00"/>
Url	<input type="text"/>		

**User Account**

Create User Account for this Contact

\* Username

**User Notifications**

Certification Reminders

**Responsibilities**

Select All | Select None

Select Responsibility	Application
<input checked="" type="checkbox"/> 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 Orders Shipments Accounts Admin Home Logout Preferences Help Diagnostics

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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.




# CPS Supplier Portal

## Manage Contacts and User Roles

### Update an Existing Contact – Contact Information

Follow the below steps to update an existing contact:

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

The screenshot shows the Oracle iSupplier Portal interface. The top navigation bar includes 'Home', 'Orders', 'Shipments', 'Accounts', and 'Admin'. Below this, there's a 'Profile Management' section with a sidebar menu containing 'General', 'Company Profile', 'Organization', 'Contact', 'Directory', and 'Product & Services'. The main content area is titled 'Contact Directory : Active Contacts' and features a table with columns: First Name, Last Name, Supplier Name, Phone Number, Email, Status, User Account, Primary Contact, User Roles, and Update. The table lists four contacts: John Smith, Parker Peter, Peter James, and Smith John. The 'Update' column for Peter James has a pencil icon highlighted with a red box. Below the active contacts is a section for 'Contact Directory : Inactive Contacts'. The footer contains 'About this Page', 'Privacy Statement', and 'Copyright (c) 2006, Oracle. All rights reserved.'



# CPS Supplier Portal

## Manage Contacts and User Roles

**ORACLE** iSupplier Portal

Admin: Profile Management: Contact Directory >

**Update Contact**

\* Indicates required field

Contact Title

\* First Name

Middle Name

\* Last Name

Alternate Name

\* Job Title

Department

\* Email Address

Url

\* Phone Area Code

\* Phone Number

Phone Extension

Alternate Phone Area Code

Alternate Phone Number

Fax Area Code

Fax Number

Inactive Date   
(example: 28-Feb-2020 19:45:00)

---

**User Account Information**

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

**User Notifications**

Certification Reminders

**Responsibilities**

Select All | Select None

Select Responsibility	Application
<input checked="" type="checkbox"/> 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

Home Logout Preferences Help Diagnostics

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



# CPS Supplier Portal Manage Contacts and User Roles

**ORACLE** iSupplier Portal

Admin: Profile Management: Contact Directory >

**Update Contact**

\* Indicates required field

Contact Title

\* First Name

Middle Name

\* Last Name

Alternate Name

\* Job Title

Department

\* Email Address

Url

\* Phone Area Code

\* Phone Number

Phone Extension

Alternate Phone Area Code

Alternate Phone Number

Fax Area Code

Fax Number

Inactive Date   
(example: 24-Feb-2020 19:45:00)

---

**User Account Information**

Username **ABC@XXX.COM** Inactive Date   
(example: 24-Feb-2020)  Reset Password

**User Notifications**

Certification Reminders

**Responsibilities**

Select All | Select None

Select Responsibility	Application
<input checked="" type="checkbox"/> 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**

Success Inc

Home Logout Preferences Help Diagnostics

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





## CPS Supplier Portal Manage Contacts and User Roles

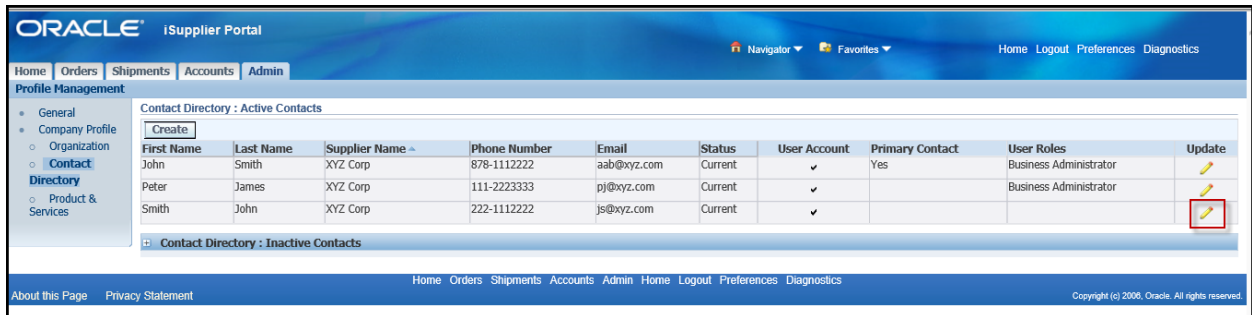
### Update an Existing Contact - Add Business Administrator Access

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.

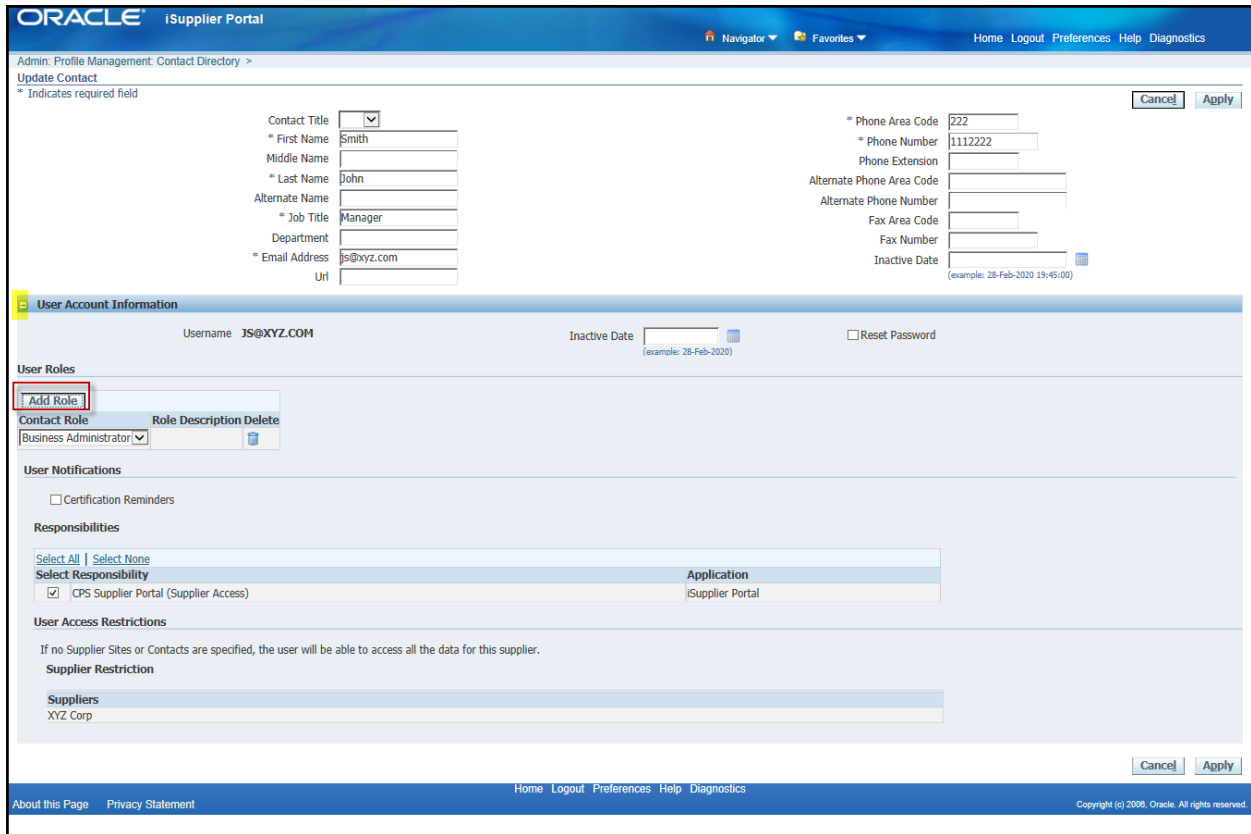
**Note:** "Business Administrator" access can only be assigned to a contact by other "Business Administrator" users. "Regular" users cannot add "Business Administrator" access to another user.

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 <b>Update</b> 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 <b>Add Role</b> button. You will see the "Business Administrator" role getting added.
4.	Click on the <b>Apply</b> button to save the change.



**Update Contact**

\* Indicates required field

Contact Title: [v]  
 \* First Name: Smith  
 Middle Name: [ ]  
 \* Last Name: John  
 Alternate Name: [ ]  
 \* Job Title: Manager  
 Department: [ ]  
 \* Email Address: js@xyz.com  
 Uri: [ ]

\* Phone Area Code: 222  
 \* Phone Number: 1112222  
 Phone Extension: [ ]  
 Alternate Phone Area Code: [ ]  
 Alternate Phone Number: [ ]  
 Fax Area Code: [ ]  
 Fax Number: [ ]  
 Inactive Date: [ ] (example: 28-Feb-2020 19:45:00)

**User Account Information**

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

**User Roles**

**Add Role** (highlighted in red box)

Contact Role: Business Administrator Role Description: [ ] Delete: [ ]

**User Notifications**

Certification Reminders

**Responsibilities**

Select All | Select None

Select Responsibility	Application
<input checked="" type="checkbox"/> 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.

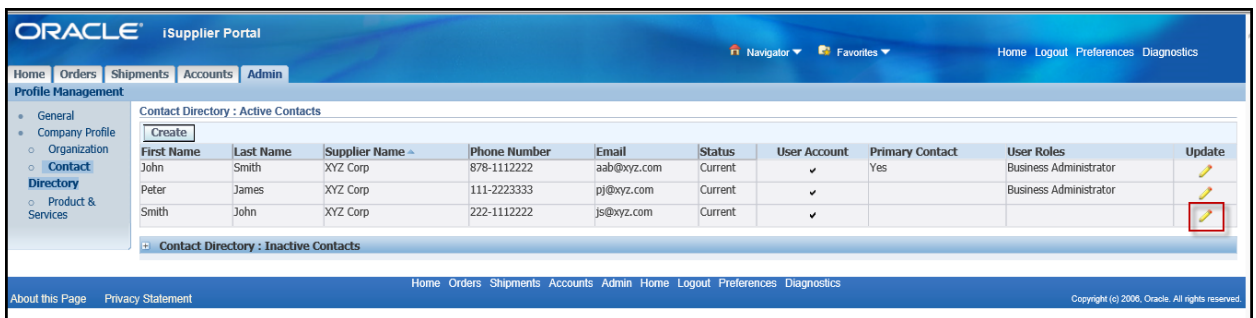
**Supplier Restriction**

Suppliers: XYZ Corp

### 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.



**Contact Directory : Active Contacts**



First Name	Last Name	Supplier Name ^	Phone Number	Email	Status	User Account	Primary Contact	User Roles	Update
John	Smith	XYZ Corp	878-1112222	aab@xyz.com	Current	✓	Yes	Business Administrator	[ ]
Peter	James	XYZ Corp	111-2223333	pj@xyz.com	Current	✓		Business Administrator	[ ]
Smith	John	XYZ Corp	222-1112222	js@xyz.com	Current	✓			[ ] (highlighted in red box)

**Contact Directory : Inactive Contacts**



# CPS Supplier Portal

## Manage Contacts and User Roles

Step	Action
1.	Click the <b>Update</b> 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 <b>Delete</b> icon next to the “Administrator” role to remove “Admin” access. 
4.	Click on ‘Apply’ button to save the change.

**ORACLE iSupplier Portal**

Admin: Profile Management: Contact Directory > Update Contact

\* Indicates required field

Contact Title: [Dropdown]

\* First Name: Peter

Middle Name: [Text]

\* Last Name: James

Alternate Name: [Text]

\* Job Title: Analyst

Department: [Text]

\* Email Address: pj@xyz.com

Url: [Text]

\* Phone Area Code: 011

\* Phone Number: 2223333

Phone Extension: [Text]

Alternate Phone Area Code: [Text]

Alternate Phone Number: [Text]

Fax Area Code: [Text]

Fax Number: [Text]

Inactive Date: [Text] (example: 28-Feb-2020 19:45:00)

Cancel Apply

---

**User Account Information**

Username: PJ@XYZ.COM


Inactive Date: [Text] (example: 28-Feb-2020)

Reset Password

---

**User Roles**

Add Role

Contact Role	Role Description	Delete
Business Administrator	Business Administrator	

---

**User Notifications**

Certification Reminders

---

**Responsibilities**

Select All | Select None

Select Responsibility	Application
<input checked="" type="checkbox"/> 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

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## CPS Supplier Portal Manage Contacts and User Roles

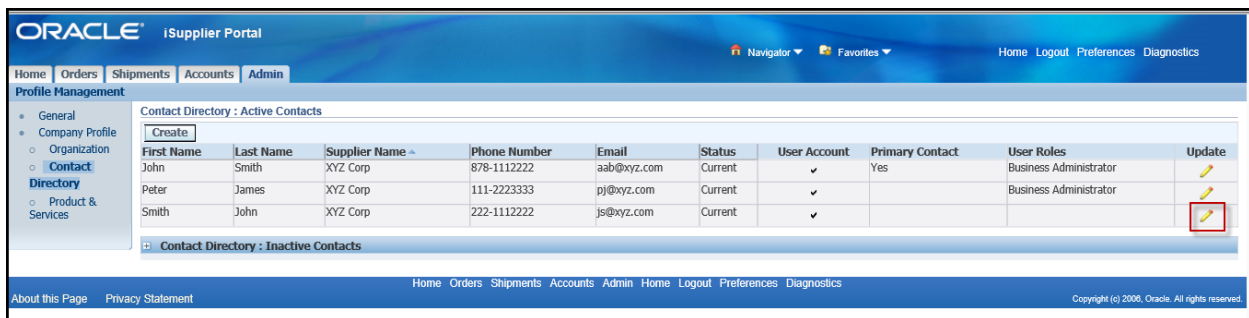
### Update an Existing Contact - Add Billing Administrator Access

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.

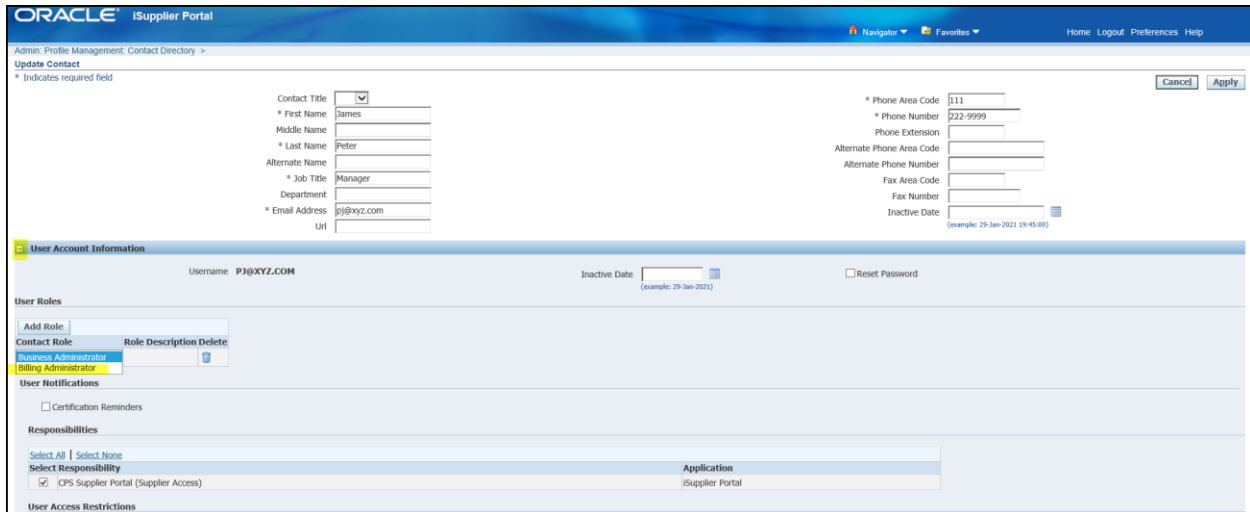
**Note:** "Billing Administrator" access can only be assigned to a contact by other "Billing Administrator" or "Business Administrator" users. "Regular" users cannot add "Billing Administrator" access to another user.

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 <b>Update</b> 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 <b>Add Role</b> button. Select the "Billing Administrator" role from the drop down.
4.	Click on the <b>Apply</b> 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.



First Name	Last Name	Supplier Name	Phone Number	Email	Status	User Account	Primary Contact	User Roles	Update
Bill	Will	XYZ Corp	444-444-4444	bwill@xyz.com	Current	✓		Billing Administrator	
James	Potter	XYZ Corp	111-222-8888	jpp@xyz.com	Current	✓	Yes	Business Administrator	

Step	Action
1.	Click the <b>Update</b> 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 <b>Delete</b> icon next to the “Billing Administrator” role. 



# CPS Supplier Portal Manage Contacts and User Roles

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

**ORACLE iSupplier Portal**

Admin: Profile Management, Contact Directory >

**Update Contact**

\* Indicates required field

Contact Title: [Dropdown]

\* First Name: Bill

Middle Name: [Text]

\* Last Name: Will

Alternate Name: [Text]

\* Job Title: Finance Admin

Department: [Text]

\* Email Address: bwill@xyz.com

Uri: [Text]

\* Phone Area Code: 944

\* Phone Number: 944-9444

Phone Extension: [Text]

Alternate Phone Area Code: [Text]

Alternate Phone Number: [Text]

Fax Area Code: [Text]

Fax Number: [Text]

Inactive Date: [Date Picker] (example: 19-Jan-2021 19:45:00)

---

**User Account Information**

Username: BWILL@XYZ.COM

Inactive Date: [Date Picker] (example: 19-Jan-2021)  Reset Password

---

**User Roles**

Contact Role	Role Description	Delete
Billing Administrator	Access to upload Invoices	<input type="button" value="Delete"/>

---

**User Notifications**

Certification Reminders

---

**Responsibilities**

Select All | Select None

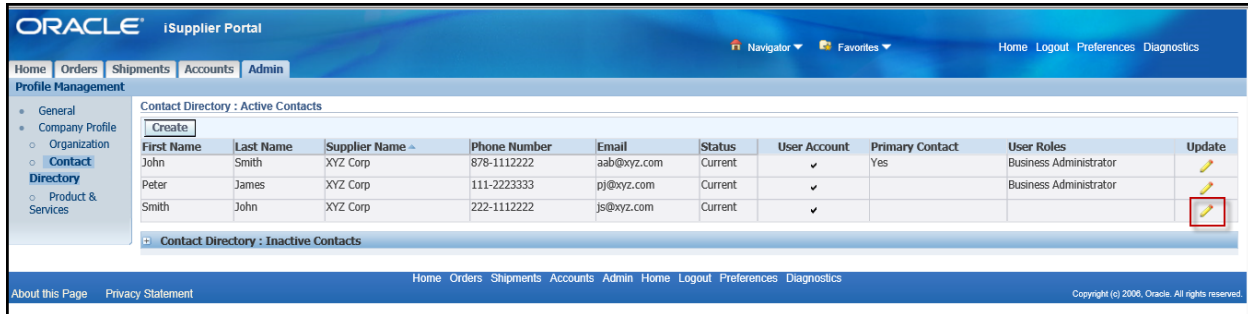
Select Responsibility	Application
<input checked="" type="checkbox"/> CPS Supplier Portal (Supplier Access)	iSupplier Portal




---


**User Access Restrictions**

### 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:



First Name	Last Name	Supplier Name	Phone Number	Email	Status	User Account	Primary Contact	User Roles	Update
John	Smith	XYZ Corp	878-1112222	aab@xyz.com	Current	✓	Yes	Business Administrator	
Peter	James	XYZ Corp	111-2223333	pj@xyz.com	Current	✓		Business Administrator	
Smith	John	XYZ Corp	222-1112222	js@xyz.com	Current	✓			

Step	Action
1.	Click the <b>Update</b> 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 <b>Calendar</b> icon to select an “Inactive Date” (see screen below).
4.	In the “User Account Information” section, click the <b>Calendar</b> icon to select an “Inactive Date” (see screen below).
5.	Click on the <b>Apply</b> button to save the change.
6.	A “Warning” message will appear at the top of the screen. Click the <b>Confirm</b> button if you want to proceed with Inactivating the contact and their User Account (see



# CPS Supplier Portal Manage Contacts and User Roles

**ORACLE iSupplier Portal** Navigator Favorites Home Logout Preferences Help Diagnostics

Admin: Profile Management: Contact Directory >

**Update Contact**  
\* Indicates required field

Contact Title    
 \* First Name  Tsu   
 Middle Name    
 \* Last Name  Poi   
 Alternate Name    
 \* Job Title  Director   
 Department    
 \* Email Address  tp@yyy.com   
 Url

\* Phone Area Code  888   
 \* Phone Number  666-4444   
 Phone Extension    
 Alternate Phone Area Code    
 Alternate Phone Number    
 Fax Area Code    
 Fax Number    
 Inactive Date  24-Feb-2020 10:41:35   
(example: 24-Feb-2020 19:45:00)

---

**User Account Information**

Username **TP@YYY.COM** Inactive Date  24-Feb-2020   
(example: 24-Feb-2020)  Reset Password

**User Notifications**

Certification Reminders

**Responsibilities**

[Select All](#) | [Select None](#)

Select Responsibility	Application
<input checked="" type="checkbox"/> 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**

Success Inc

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**ORACLE iSupplier Portal** Navigator Favorites Home Logout Preferences Help Diagnostics

Home Orders Shipments Accounts Admin

**Profile Management**

- General
- Company Profile
- Organization
- Contact Directory**
  - Product & Services

**Warning**

If you inactivate the contact then all the supplier site contacts linked to this contact will also be inactivated. In addition, inactivation of this contact may affect other applications that are using the contact for non-purchasing related activities. Are you sure you want to remove the contact?

**Update Contact**  
\* Indicates required field

Contact Title    
 \* First Name  Tsu   
 Middle Name    
 \* Last Name  Poi   
 Alternate Name    
 \* Job Title  Director   
 Department    
 \* Email Address  tp@yyy.com   
 Url

\* Phone Area Code  888   
 \* Phone Number  666-4444   
 Phone Extension    
 Alternate Phone Area Code    
 Alternate Phone Number    
 Fax Area Code    
 Fax Number    
 Inactive Date  24-Feb-2020 10:41:35   
(example: 24-Feb-2020 19:45:00)

---

**User Account Information**

Username **TP@YYY.COM** Inactive Date  24-Feb-2020   
(example: 24-Feb-2020)  Reset Password





# CPS Supplier Portal

## Manage Contacts and User Roles

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

The screenshot displays the Oracle iSupplier Portal interface. At the top, there is a navigation bar with 'Home', 'Orders', 'Shipments', 'Accounts', and 'Admin' tabs. Below this is a 'Profile Management' sidebar with a tree view containing 'General', 'Company Profile', 'Organization', 'Contact', 'Directory', and 'Product & Services'. The main content area is titled 'Contact Directory : Active Contacts' and features a 'Create' button and a table with columns: First Name, Last Name, Supplier Name, Phone Number, Email, Status, User Account, Primary Contact, User Roles, and Update. Two active contacts are listed: 'Abc Def' (Success Inc, 888-888-8888, abc@xxx.com, Current, User Account checked) and 'Nit Achu' (Success Inc, 444-4443333, NSA@GMAIL.COM, Current, User Account checked, Primary Contact Yes, User Roles Administrator). Below this is a section for 'Contact Directory : Inactive Contacts' with a table containing one entry: 'Tsu Poi' (Success Inc, 888 666-4444, tp@yyy.com, Inactive, User Account checked). The footer includes 'About this Page', 'Privacy Statement', and 'Copyright (c) 2006, Oracle. All rights reserved.'

First Name	Last Name	Supplier Name	Phone Number	Email	Status	User Account	Primary Contact	User Roles	Update
Abc	Def	Success Inc	888-888-8888	abc@xxx.com	Current	✓			
Nit	Achu	Success Inc	444-4443333	NSA@GMAIL.COM	Current	✓	Yes	Administrator	

First Name	Last Name	Supplier Name	Phone Number	Email	Status	User Account
Tsu	Poi	Success Inc	888 666-4444	tp@yyy.com	Inactive	✓