



Cleveland Clinic

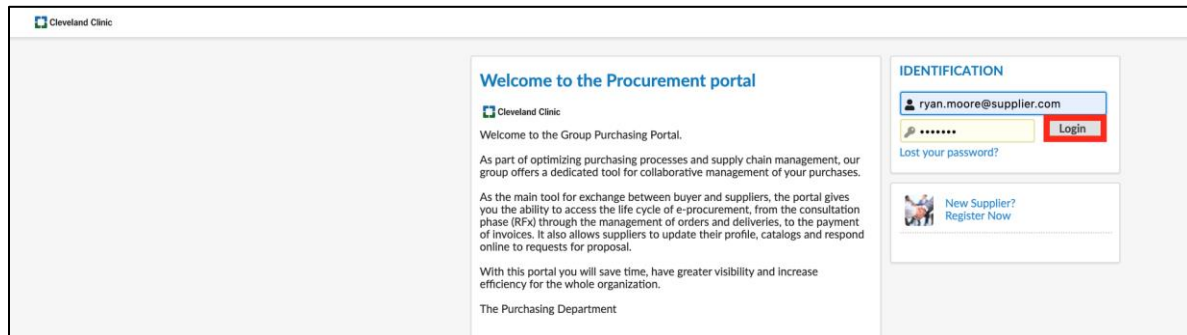
Updating Ivalua Supplier Portal Profile (contacts and documents)

User Guide

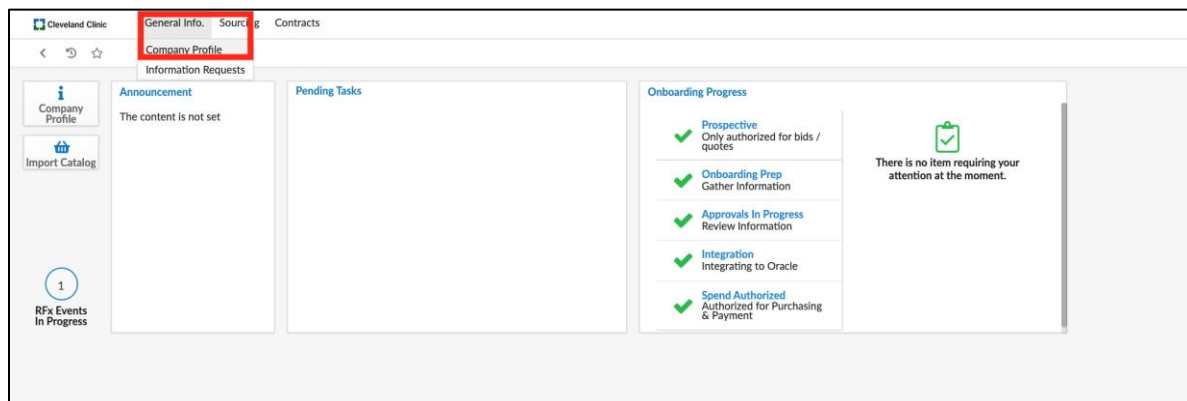
[GLOBAL BUSINESS TRANSFORMATION](#)

Purpose: The purpose of this document is to provide Suppliers with a quick guide on how to add/update contacts and documents.

1. Login to the Ivalua Portal

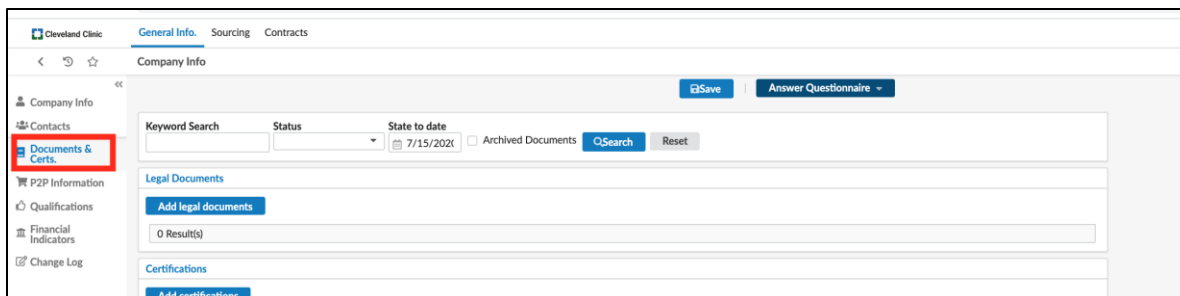


2. Navigate to the **General Info** Tab and select **Company Profile** from the drop down.

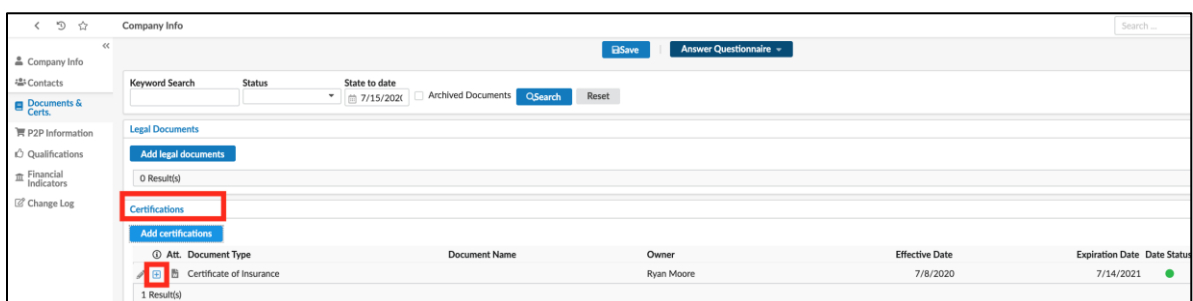


Updating Documents

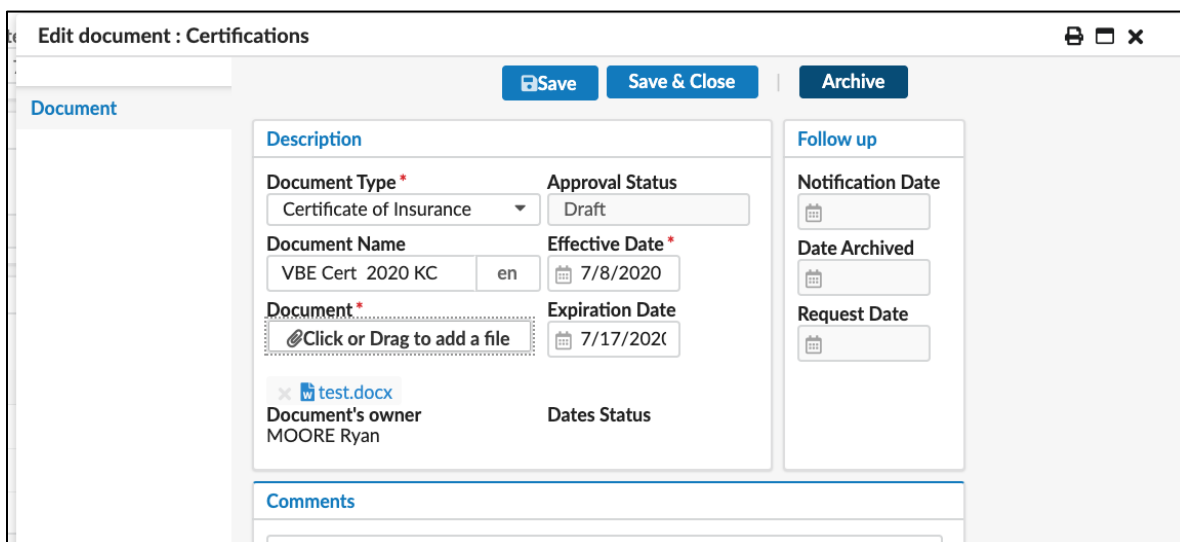
- Once on the Company info page, navigate to the Documents & Certs. page from the navigation bar.



- Under the Certifications section, find the document that needs to be updated and click the edit + button to the left of the document.



- In the Edit Document pop-up page, update the Document details.



6. Click Save. Click the X to close the pop-up page.

Edit document : Certifications

Document

Description

Document Type *
Certificate of Insurance

Document Name
VBE Cert 2020 KC en

Document *
Click or Drag to add a file

Document's owner
MOORE Ryan

Approval Status
Draft

Effective Date *
7/8/2020

Expiration Date
7/17/2020

Dates Status

Follow up

Notification Date

Date Archived

Request Date

Comments

7. Click on the edit pencil next to the expiring document.

Cleveland Clinic

General Info Sourcing Contracts

Company Info

Keyword Search Status State to date 7/15/2020 Archived Documents Search Reset

Legal Documents

Add legal documents

0 Result(s)

Certifications

Add certifications

Att.	Document Type	Document Name	Owner	Effective Date	Expiration Date	Date Status	Approval Status
1	Certificate of Insurance	VBE Cert 2020 KC	Ryan Moore	7/8/2020	7/16/2020		✓

8. Click the "Archive" button; then click "OK" to confirm.

Edit document : Certifications

Document

Description

Document Type
Certificate of Insurance

Document Name
VBE Cert 2020 KC en

Document *
test.docx

Document's owner
MOORE Ryan

Approval Status
Approved

Effective Date
7/8/2020

Expiration Date
7/17/2020

Dates Status

Follow up

Notification Date

Date Archived

Request Date

Comments

Add a comment here

env-pre03-alt.ivalua.us says

Do you really want to archive this document?

9. Click the X to close the pop-up page.

Edit document : Certifications

Document

Description

Document Type: Certificate of Insurance

Approval Status: Approved

Document Name: VBE Cert 2020 KC en

Effective Date: 7/8/2020

Document*: test.docx

Expiration Date: 7/17/2020

Document's owner: MOORE Ryan

Dates Status

Follow up

Notification Date

Date Archived: 7/15/2020

Request Date

Updating Contacts Information

10. Navigate to the **contacts** page from the navigation bar.

Cleveland Clinic

General Info. Sourcing Contracts

Company Info

Company Info

Contacts

Documents & Certs.

P2P Information

Qualifications

Financial Indicators

Change Log

Supplier Contacts

Select an Existing Contact + Add a New Contact

Name	Username	Job Title	Role(s)	Status
Moore Ryan	ryan.moore@supplier.com	Sales Manager	Supplier Admin	Active
Myers Bailey	Bailey@supplier.com		A/R Rep	Active

11. Under the Supplier Contacts section, find the contact that needs to be updated and click the edit pencil button to the left of their name.

The screenshot shows the 'Supplier Contacts' management interface. At the top, there are tabs for 'General Info.', 'Sourcing', and 'Contracts'. Below the tabs, there's a 'Company Info' section with a 'Save' button and an 'Answer Questionnaire' button. The main area is titled 'Supplier Contacts' and contains a table with columns: Name, Username, Job Title, Role(s), and Status. The table lists two contacts: 'Moore Ryan' (Sales Manager, Supplier Admin, Active) and 'Myers Bailey' (A/R Rep, Active). A red box highlights the 'Select an Existing Contact' button, and another red box highlights the edit pencil icon next to 'Myers Bailey'.

12. Under the phone section, input a new cell phone number.
Click **Save & Close** at the top of the Supplier contact management page.

The screenshot shows the 'Supplier contact management : Bailey Myers' page. At the top, there are 'Save' and 'Save & Close' buttons. The 'Identity' section contains fields for First Name (Bailey), Last Name (Myers), Email (Bailey@supplier.com), Job Title, and Supplier (E2E_02 UKSUP_01). The 'Phone' section is highlighted with a red box and contains fields for Country Code ([44]), Area Code (331), and Cell Number (1239). The 'Photo' section has a 'Click or Drag to add a picture' button. The 'Cell / Mobile' section has fields for Country Code, Area Code, and Cell Number. The 'Fax' section is also visible.

13. Click on the **+ Add a New Contact** button under the Supplier Contacts section of the Contacts page.

The screenshot shows the 'Supplier Contacts' section of the Cleveland Clinic portal. The 'General Info.' tab is active. The 'Supplier Contacts' section has two buttons: 'Select an Existing Contact' and '+ Add a New Contact'. The '+ Add a New Contact' button is highlighted with a red box. Below the buttons is a table with columns: Name, Username, Job Title, Role(s), and Status. The table lists two contacts: Moore Ryan (Sales Manager, Supplier Admin role) and Myers Bailey (A/R Rep role). Both contacts are marked as 'Active'.

Name	Username	Job Title	Role(s)	Status
Moore Ryan	ryan.moore@supplier.com	Sales Manager	Supplier Admin	Active
Myers Bailey	Bailey@supplier.com		A/R Rep	Active

14. Enter in the contact's **first name, last name, email** and click **Save and Close** at the top of the window.

The screenshot shows the 'Supplier contact management' window. The 'Save & Close' button is highlighted with a red box. The 'Identity' section is highlighted with a red box, showing fields for First Name, Last Name, and Email. The 'First Name' field contains 'Pam', the 'Last Name' field contains 'Halpert', and the 'Email' field contains 'Pam@office.com'. The 'Language' dropdown menu is set to 'English'.

Field	Value
First Name *	Pam
Last Name *	Halpert
Email *	Pam@office.com
Language	English

15. In the **Role** field next to the contract you added, click on the drop down and select the contact role.

The screenshot shows the 'Supplier Contacts' interface. At the top, there are two buttons: 'Select an Existing Contact' and '+ Add a New Contact'. Below these is a table with columns: Name, Username, Job Title, Role(s), and Status. The table lists three contacts: Halpert Pam, Moore Ryan, and Myers Bailey. The 'Role(s)' column for Halpert Pam is highlighted with a red box, and a dropdown menu is open, showing a list of roles: A/R Rep, Diversity Rep, EDI Rep, Executive / Management, Ordering (PO) Rep, Quality Rep, Sales Rep, Sourcing Rep, Supplier Admin, and Technician.

Name	Username	Job Title	Role(s)	Status
Halpert Pam			A/R Rep Diversity Rep EDI Rep Executive / Management Ordering (PO) Rep Quality Rep Sales Rep Sourcing Rep Supplier Admin Technician	Active
Moore Ryan	ryan.moore@supplier.com	Sales Manager		Active
Myers Bailey	Bailey@supplier.com			Active

16. Click on the **envelope** icon under the Login Invitation column of the contact you just added.

The screenshot shows the 'Supplier Contacts' interface. At the top, there are two buttons: 'Select an Existing Contact' and '+ Add a New Contact'. Below these is a table with columns: Name, Username, Job Title, Role(s), and Status. The table lists three contacts: Halpert Pam, Moore Ryan, and Myers Bailey. The 'envelope' icon in the 'Login Invitation' column for Halpert Pam is highlighted with a red box.

Name	Username	Job Title	Role(s)	Status
Halpert Pam			Customer Service Rep	Active
Moore Ryan	ryan.moore@supplier.com	Sales Manager	Supplier Admin	Active
Myers Bailey	Bailey@supplier.com		A/R Rep	Active

17. Ensure the **profile code** of Supplier is selected, click **Send Invitation** at the top of the window and click the "X" at the right corner to close the screen.

Invite a supplier contact to login

Send invitation

Invite a contact

First Name
Pam Halpert

Email
Pam@office.com

Profile code *
✓ Supplier ⓘ

Subject
Access to Ivalua Buyer

Notification body
Dear Pam Halpert,
You have just been assigned an access to the application Ivalua Buyer for supplier E2E_02 UKSUP_01.
You are invited to follow this link : [Click here](#)
Your user ID: {login}
Your password: {password}

Invite a supplier contact to login

The invitation to register has been sent to the contact

Invite a contact

18. Click **Save** at the top of the page before navigating away to any other page.

Supplier Contacts

Select an Existing Contact + Add a New Contact

Name	Username	Job Title	Role(s)	Status
Halpert Pam	Pam@office.com		Customer Service Rep	Active
Moore Ryan	ryan.moore@supplier.com	Sales Manager	Supplier Admin	Active
Myers Bailey	Bailey@supplier.com		A/R Rep	Active

Save Answer Questionnaire

19. Navigate to the upper right-hand corner of the webpage, and click on the downward arrow next to the user name. The drop down will open and click **Logout**.

