

## PERFORMING SUPPLIER ADMINISTRATOR DUTIES

eSupplier is a self-service module that provides suppliers access to view the real-time status on payment information that exists between the supplier and the agency they are doing business with. This job aid provides step-by-step instructions on how suppliers can log into the eSupplier portal and assign other users within their company view only access to their company's information.

### Logging Into the eSupplier Portal



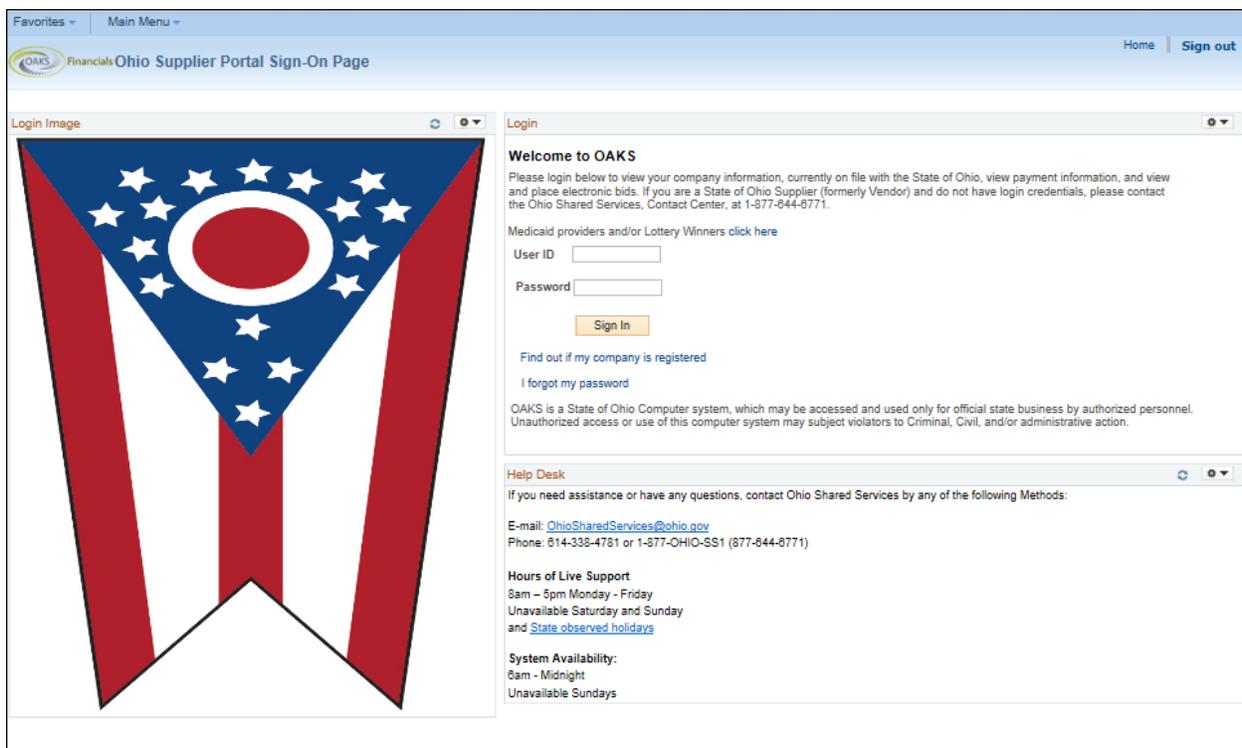
Before beginning steps below, navigate to <http://www.obm.ohio.gov/supplier/>.

The screenshot shows the Ohio Supplier Portal homepage. At the top left is the Ohio state logo. To its right is the text "Ohio Supplier Portal" in a large, bold, red font. In the top right corner, there is a navigation bar with "Ohio.gov" and "State Agencies | Online Services". Below the header, a paragraph of text explains the site's purpose and includes a link: "Click here to go straight to the Ohio Supplier Portal Sign-On Page." Below this text is a section titled "Are you a..." with three buttons: "Supplier", "Medicaid Provider", and "Lottery Winner". Below that is a section titled "Need Help?" with a button labeled "Training / Instructional Guide". At the bottom, there is a box containing a small image of a document and a link labeled "About eSupplier".

# PERFORMING SUPPLIER ADMINISTRATOR DUTIES

Step-by-Step	Screen
<p>1. Click the <b>Click here to go straight to the Ohio Supplier Portal Sign-On Page</b> link on the <b>Ohio Supplier Portal</b> page.</p>	 <p>ent information, as well as placing bids and viewing address and contact  <a href="#">Click here to go straight to the Ohio Supplier Portal Sign-On Page.</a></p> <p>Supplier Medicaid Provider</p>

The **Ohio Supplier Portal Login Page** displays.

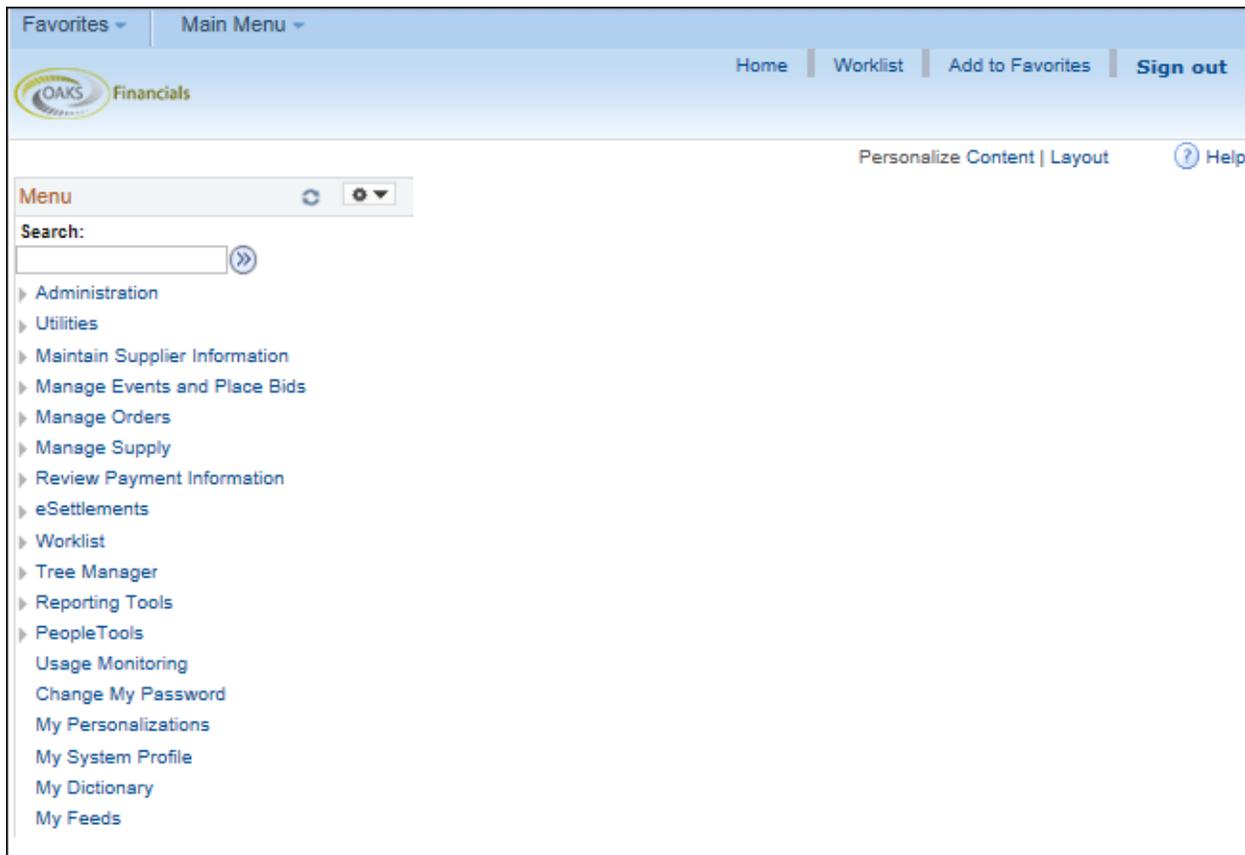


## PERFORMING SUPPLIER ADMINISTRATOR DUTIES

<p>2. Enter <b>User ID</b>.</p>	<p>Login</p> <p><b>Welcome to OAKS</b></p> <p>Please login below to view your company information, currently o and place electronic bids. If you are a State of Ohio Supplier (from the Ohio Shared Services, Contact Center, at 1-877-644-6771.</p> <p>Medicaid providers and/or Lottery Winners <a href="#">click here</a></p> <p>User ID <input type="text"/></p> <p>Password <input type="password"/></p> <p><input type="button" value="Sign In"/></p>
<p>3. Enter <b>Password</b>.</p>	<p><b>Welcome to OAKS</b></p> <p>The Ohio Supplier Portal page is where suppliers can do m information, electronic bidding, and access eSettlements to</p> <p>Medicaid providers and/or Lottery Winners <a href="#">click here</a></p> <p>User ID <input type="text" value="ADMIN123"/></p> <p>Password <input type="password"/></p>
<p>4. Click <b>Sign In</b>.</p>	<p>Medicaid providers and/or Lottery Winners <a href="#">click here</a></p> <p>User ID <input type="text" value="ADMIN123"/></p> <p>Password <input type="password" value="••••••••"/></p> <p><input type="button" value="Sign In"/></p>

# PERFORMING SUPPLIER ADMINISTRATOR DUTIES

The **Main Menu** displays.



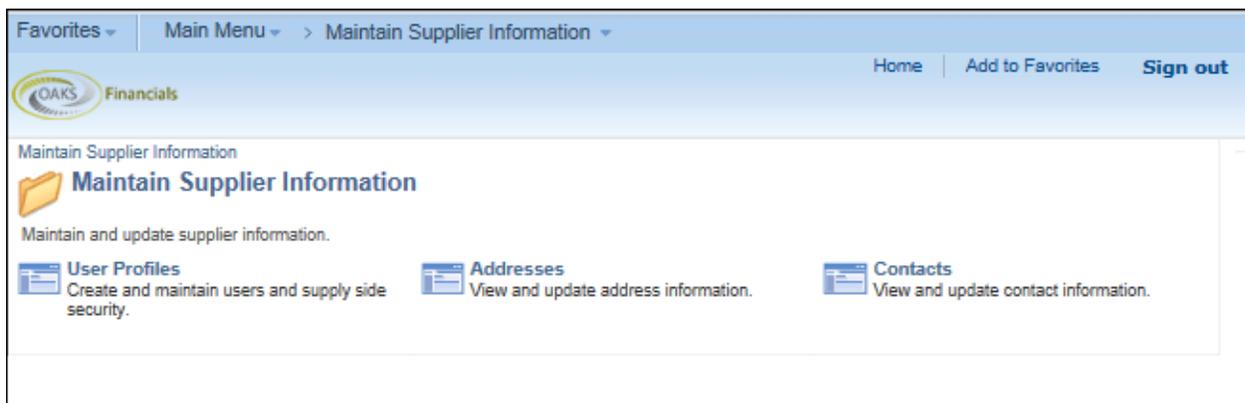
The screenshot shows the OAKS Financials Main Menu. At the top, there are navigation links for Home, Worklist, Add to Favorites, and Sign out. Below the navigation bar, there is a search box and a list of menu items. The menu items are: Administration, Utilities, Maintain Supplier Information, Manage Events and Place Bids, Manage Orders, Manage Supply, Review Payment Information, eSettlements, Worklist, Tree Manager, Reporting Tools, PeopleTools, Usage Monitoring, Change My Password, My Personalizations, My System Profile, My Dictionary, and My Feeds.

## Performing Supplier Administrator Duties

Each supplier must have a designated Supplier Administrator user. User with the Supplier Administrator security role can log into the eSupplier portal and assign other users within their company view only access to their company's information such as contacts, addresses, invoices, payments, account balances, purchase orders, and receipts.



### OAKS FIN > Main Menu > Maintain Supplier Information



The screenshot shows the OAKS Financials Maintain Supplier Information page. The page title is "Maintain Supplier Information". Below the title, there is a folder icon and the text "Maintain and update supplier information." There are three main sections: "User Profiles" (Create and maintain users and supply side security), "Addresses" (View and update address information), and "Contacts" (View and update contact information).

# PERFORMING SUPPLIER ADMINISTRATOR DUTIES

1. Select the **User Profiles** link.



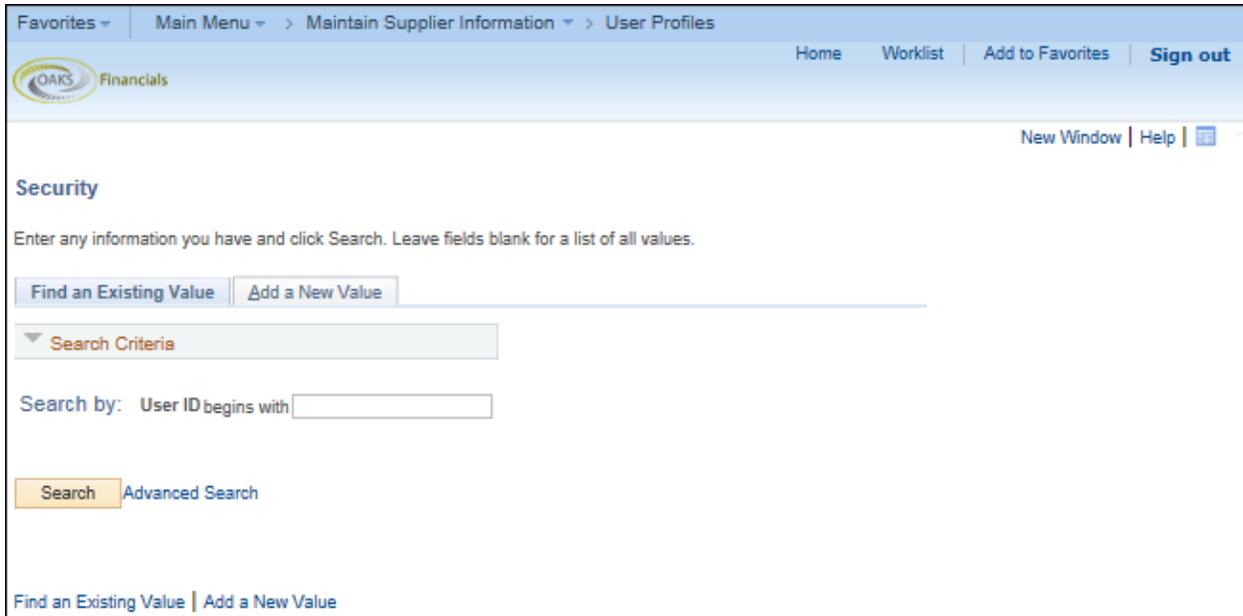
Maintain Supplier Information

**Maintain Supplier Information**

Maintain and update supplier information.

**User Profiles**  
Create and maintain users and supply side security.

The User Profile **Security** page displays.



Navigation: Favorites > Main Menu > Maintain Supplier Information > User Profiles

Home | Worklist | Add to Favorites | **Sign out**

New Window | Help

### Security

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

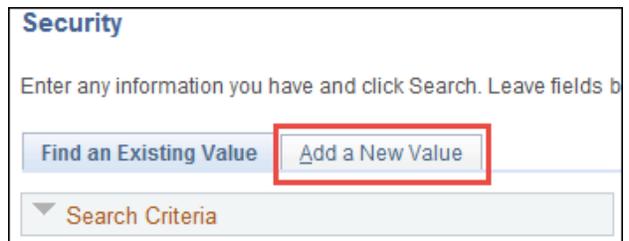
Search Criteria

Search by: User ID begins with

Search | Advanced Search

Find an Existing Value | Add a New Value

2. Click the **Add a New Value** tab.



### Security

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | **Add a New Value**

Search Criteria

# PERFORMING SUPPLIER ADMINISTRATOR DUTIES

The **Security** page displays.

<p>3. Enter a <b>User ID</b>.</p>  <p>The User ID cannot have any spaces in it, but has no other restrictions.</p>	
<p>4. Click <b>Add</b>.</p>	

# PERFORMING SUPPLIER ADMINISTRATOR DUTIES

The **Setup User** page displays.

Favorites ▾ | Main Menu ▾ > Maintain Supplier Information ▾ > User Profiles

Home | Worklist | Add to Favorites | **Sign out**

 OAKS Financials

New Window | Help | Personalize Page | 

## Setup User

**Logon Information**

User ID NEW\_USER  
Description   
(Examples: Fred Smith, AP Department or Buyer)  
 Account Locked Out?  
(Click here to disable the access to the system for this user)

Operator Password (Encrypted)   
Confirm Password   
\*E-mail Address   
Language Code  Currency Code   
Rate Type

**User Roles** Personalize |  |  First 1 of 1 Last

Role Name	Description

**Add a User Role**

**Supplier Access** Personalize |  |  First 1 of 1 Last

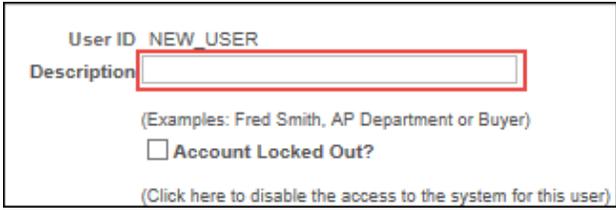
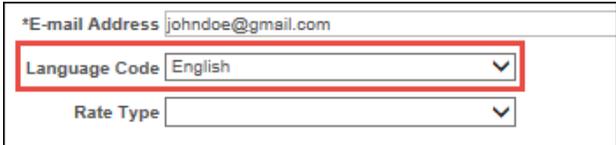
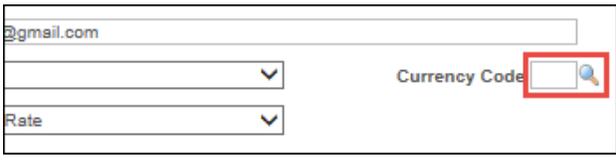
Supplier

**Add a Supplier**

**Save** Return to Search List

\* Required Field

## PERFORMING SUPPLIER ADMINISTRATOR DUTIES

<p>5. Enter a <b>Description</b>.</p>  <p>The description should be the name of the user that is being setup.</p>	
<p>6. Enter an <b>Operator Password</b>.</p>  <p>The password must abide by the following guidelines: minimum of 8 characters, contain at least 1 special character and contain at least 1 digit. Passwords expire after 90 days.</p>	
<p>7. Enter the same password in the <b>Confirm Password</b> field.</p>	
<p>8. Enter an <b>Email Address</b>.</p>	
<p>9. Enter a <b>Language Code</b>.</p>  <p>The system will default the language code to English. Use the dropdown to select a different language.</p>	
<p>10. Enter a <b>Rate Type</b>.</p>  <p>The only value available will be <b>Current Rate</b>.</p>	
<p>11. Click the <b>Currency Code</b> look up icon to select a Currency Code.</p>  <p>The only value available will be USD.</p>	

## PERFORMING SUPPLIER ADMINISTRATOR DUTIES

12. Click **Add a User Role** to add roles to the User ID.

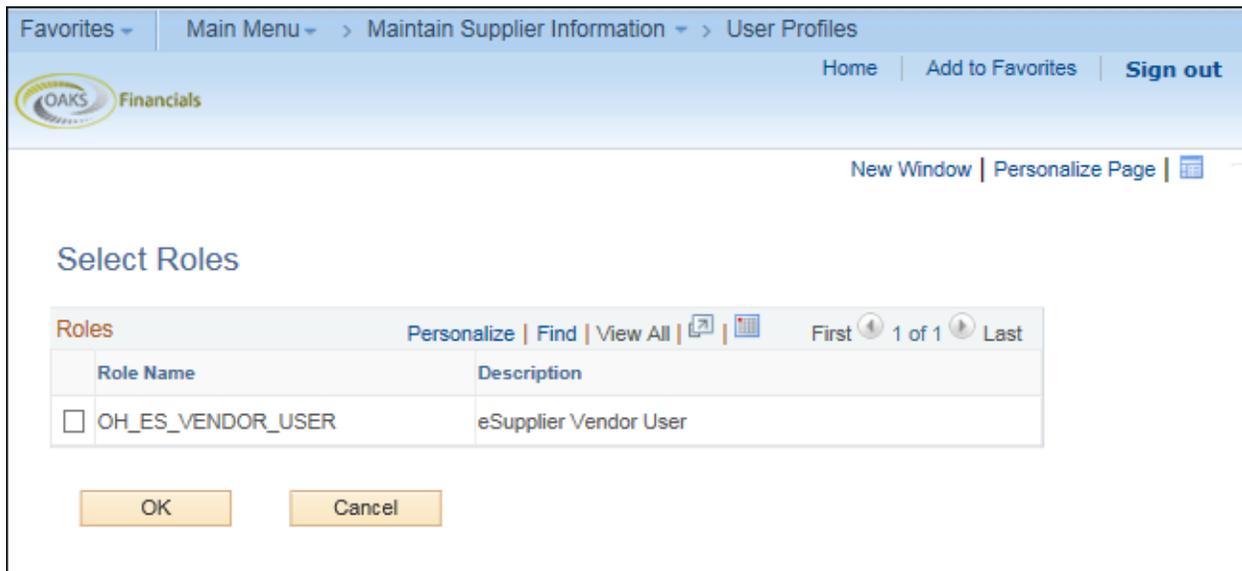


The screenshot shows a table titled "User Roles" with two columns: "Role Name" and "Description". Below the table is a button labeled "Add a User Role" which is highlighted with a red rectangular border.

The **Select Roles** page displays.



The supplier administrator can only add the OH\_ES\_VENDOR\_USER role.



The screenshot shows the "Select Roles" page in a web application. The breadcrumb trail is "Main Menu > Maintain Supplier Information > User Profiles". The page title is "Select Roles". Below the title is a table with the following data:

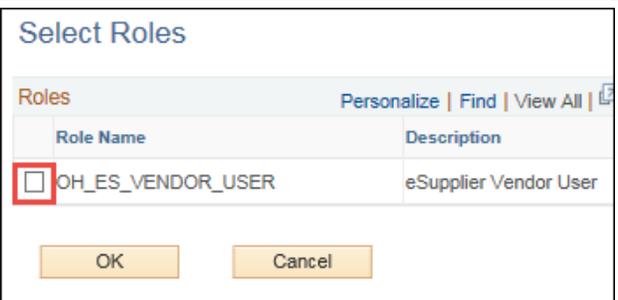
Role Name	Description
<input type="checkbox"/> OH_ES_VENDOR_USER	eSupplier Vendor User

Below the table are two buttons: "OK" and "Cancel".

13. Select the **checkbox** next to the role name.



If the checkbox is not checked, the user will not have access to review supplier information.



The screenshot shows the "Select Roles" page. The table from the previous screenshot is shown, but the checkbox next to "OH\_ES\_VENDOR\_USER" is highlighted with a red rectangular border.

# PERFORMING SUPPLIER ADMINISTRATOR DUTIES

14. Click **OK**.

Select Roles

Roles Personalize | Find | View All |

Role Name	Description
<input checked="" type="checkbox"/> OH_ES_VENDOR_USER	eSupplier Vendor User

The **Setup User** page displays.

Favorites > Main Menu > Maintain Supplier Information > User Profiles

Home | Add to Favorites | Sign out

OAKS Financials

New Window | Personalize Page |

## Setup User

**Logon Information**

User ID: NEW\_USER1  
Description: John Doe  
(Examples: Fred Smith, AP Department or Buyer)  
 Account Locked Out?  
(Click here to disable the access to the system for this user)

Operator Password (Encrypted): ●●●●●●●●  
Confirm Password: ●●●●●●●●

\*E-mail Address: johndoe@gmail.com

Language Code: English | Currency Code: USD |  
Rate Type: Current Rate

**User Roles** Personalize | First 1 of 1 Last

Role Name	Description	
OH_ES_VENDOR_USER	eSupplier Vendor User	Delete

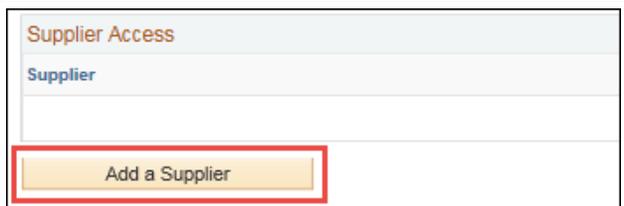
**Supplier Access** Personalize | First 1 of 1 Last

Supplier	

\* Required Field

## PERFORMING SUPPLIER ADMINISTRATOR DUTIES

15. Click **Add a Supplier**.

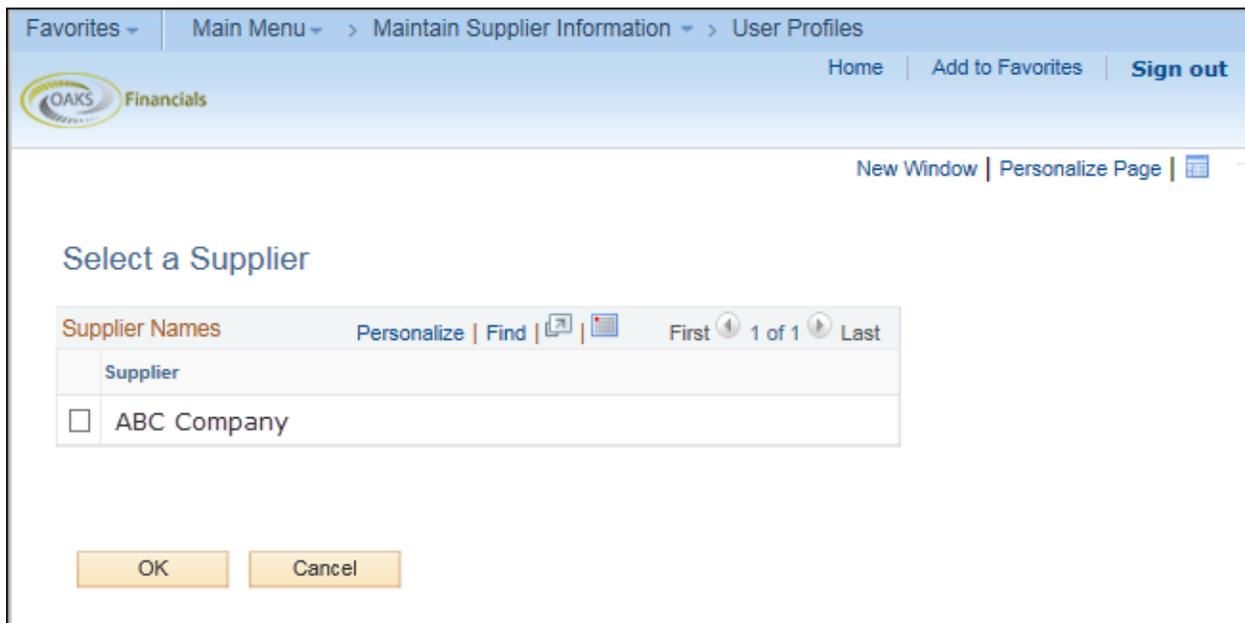


Supplier Access

Supplier

Add a Supplier

The **Select a Supplier** page displays.



Favorites Main Menu Maintain Supplier Information User Profiles

Home Add to Favorites Sign out

OAKS Financials

New Window Personalize Page

### Select a Supplier

Supplier Names Personalize Find First 1 of 1 Last

Supplier
<input type="checkbox"/> ABC Company

OK Cancel

16. Check the **checkbox** next to the supplier.



If the checkbox is not checked, the user will not have access to review supplier information.

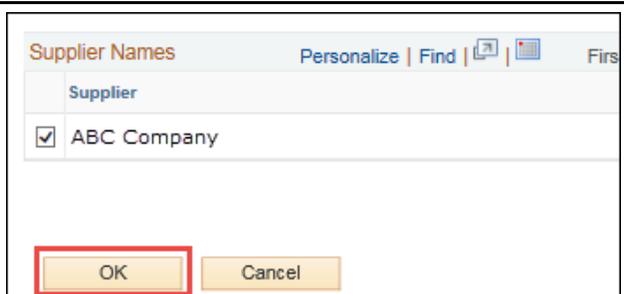


### Select a Supplier

Supplier Names Personalize Find First

Supplier
<input checked="" type="checkbox"/> ABC Company

17. Click **OK**.



### Select a Supplier

Supplier Names Personalize Find First

Supplier
<input checked="" type="checkbox"/> ABC Company

OK Cancel

# PERFORMING SUPPLIER ADMINISTRATOR DUTIES

The **Setup User** page displays.

Setup User

Logon Information

User ID: NEW\_USER1  
Description: John Doe  
(Examples: Fred Smith, AP Department or Buyer)  
 Account Locked Out?  
(Click here to disable the access to the system for this user)  
Operator Password (Encrypted): ●●●●●●●●  
Confirm Password: ●●●●●●●●  
\*E-mail Address: johndoe@gmail.com  
Language Code: English  
Currency Code: USD  
Rate Type: Current Rate

User Roles

Role Name	Description	
OH_ES_VENDOR_USER	eSupplier Vendor User	Delete

Add a User Role

Supplier Access

Supplier	
ABC COMPANY	Delete

Add a Supplier

Save Return to Search List

\* Required Field

18. Click **Save**.

Add a Supplier

Save Return to Search List

\* Required Field