Cleveland Clinic

Updating Ivalua Supplier Portal Profile (contacts and documents)

<u>User Guide</u>

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

Cleveland Clinic		
	Welcome to the Procurement portal Cleveland Clinic Welcome to the Group Purchasing Portal. As part of optimizing purchasing processes and supply chain management, our group offers a dedicated to off or collaborative management of your purchases. As the main tool for exchange between buyer and suppliers, the portal gives you the ability to access the life cycle of e-procurement, from the consultation phase (RFs) through the management of orders and deliveries, to the payment	IDENTIFICATION Tyan.moore@supplier.com Tyan.moore@supplier.com Login Lost your password? New Supplier? Register Now
	of invoices. It also allows suppliers to update their profile, catalogs and respond online to requests for proposal. With this portal you will save time, have greater visibility and increase efficiency for the whole organization. The Purchasing Department	

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

< つ ☆	Company Profile Information Requests		
i Company Profile inport Catalog	Announcement The content is not set	Pending Tasks	Onboarding Progress Prospective quotes Onboarding Prep Gather Information Approvals In Progress Review Information Integration Integrating to Oracle Spend Authorized Authorized for Purchasing Report



Updating Documents

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

Cleveland Clinic	General Info. Sourcing Contracts
く つ ☆	Company Info
Company Info	ElSave Answer Questionnaire ~
Contacts Contacts & Certs.	Keyword Search Status State to date
₹ P2P Information	Legal Documents
D Qualifications	Add legal documents
血 Financial Indicators	O Result(s)
🖉 Change Log	Certifications
	Add certifications

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

く つ ☆	Company Info				Search
Company Info			BSave Answer Questionnaire	-	
🛎 Contacts Documents & Certs.	Keyword Search Status	State to date T 7/15/2021 Archived Documents OSearch	Reset		
₩ P2P Information	Legal Documents				
Qualifications	Add legal documents				
	0 Result(s)				
🖉 Change Log	Certifications				
	Add certifications	Description Name	Owner	Effective Date	Expiration Date Date Status
	Att. Document Type Dectrificate of Insurance Result(s)	Document Name	Ryan Moore	7/8/2020	7/14/2021

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

Edit document : Certif	ications	⊕ □ ×
Document	Save Save & Close Archive	
	Description Follow up	
	Document Type * Approval Status Certificate of Insurance * Draft Document Name Effective Date * VBE Cert 2020 KC en m 7/8/2020 Document * Expiration Date @Click or Drag to add a file m m T/17/202(MOORE Ryan Dates Status Comments	e



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

Edit document : Ce	rtifications	8
Document	Save & Close	Archive
ocument	Description	Follow up
	Document Type * Approval Status Certificate of Insurance Draft	Notification Date
	Document Name Effective Date* VBE Cert 2020 KC en imit 7/8/2020	Date Archived
	Document * Expiration Date @Click or Drag to add a file 7/17/202(Request Date
	test.docx Document's owner MOORE Ryan	

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

Cleveland Clinic	General Info. Sourcing Contracts				🗘 🥴 Ryan M. 🗸
く つ ☆	Company Info				Search Q 🖶
Company Info			Answer Questionnaire		
봅 Contacts	Keyword Search Status	State to date The Trip of Trip	Reset		
Documents & Certs.		7/15/2020 Archived Documents QSearch	Reset		
〒 P2P Information	Legal Documents				
i Qualifications	Add legal documents				
章 Financial Indicators	O Result(s)				
Change Log	Certifications				
	Add certifications				
	Att. Document Type	Document Name	Owner	Effective Date	Expiration Date Date Status Approval Status
	🥒 🗈 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 : O	Certifications			₿□×
Document		Save Save & Close	Archive	
Document	Description		Follow up	
	Document Type Certificate of Insurance	Approval Status Approved	Notification Date	
	Document NameVBE Cert 2020 KC	en 7/8/2020	Date Archived	
	Document*	Expiration Date	Request Date	
	Document's owner MOORE Ryan	Dates Status		
	Comments			
	Add a comment here			





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

Edit document :	Certifications			⊖tu ×
Document		Save Save & Close	Unarchive	
	Description		Follow up	
	Document Type Certificate of Insurance	Approval Status Approved	Notification Date	
	Document Name VBE Cert 2020 KC	en 7/8/2020	Date Archived	
	Document * ➡ test.docx	Expiration Date	Request Date	
	Document's owner MOORE Ryan	Dates Status		

Updating Contacts Information

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

General Info. Sourcing	Contracts				
Company Info					
					Answer Questionnaire -
Supplier Contacts					
Select an Existing Co	+ Add a New Contact	t			
Name	(i) Username (i)	Job Title	Role(s)	Status	
🖉 🗊 Moore Ryan	✓• rvan moore@supplier.com	Sales Manager	•	Active	
a moore right	La Manandore Esoppriciteon	Sures Manager	Bupplier Admin		
10 Myers Bailey	Bailev@supplier.com		-		
, <u> </u>			A/R Rep		
	Company Info Supplier Contacts Select an Existing Co	Company Info Supplier Contacts Select an Existing Contact +Add a New Contact Name O Username O Moore Ryan : ryan.moore@supplier.com	Company Info Supplier Contacts Select an Existing Contact +Add a New Contact Name O Username Job Title Moore Ryan I ryan.moore@supplier.com Sales Manager	Company Info Supplier Contacts Select an Existing Contact + Add a New Contact Name Username Job Title Role(s) More Ryan Supplier Admin Supplier Admin Myers Balley Balley@supplier.com	Company Info Supplier Contacts Select an Existing Contact +Add a New Contact Name ① Username ① Job Title Role(s) Status Moore Ryan : yan.moore@supplier.com Sales Manager Active Supplier Admin Active Myers Bailey : • Bailey@supplier.com



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.

Cleveland Clinic	General Info. Sourcing	Contracts						
< "3 ☆	Company Info							
« Company Info						Save	Answer Questionnai	'e ⇒
🚢 Contacts	Supplier Contacts							
Documents & Certs.	Select an Existing Co	ontact + Add a New Contact						
P2P Information	Name	(i) Username (i)	Job Title	Role(s)	Status			
 Qualifications Financial Indicators 	🖋 🏛 Moore Ryan	☑ • ryan.moore@supplier.com	Sales Manage	🗊 Supplier Admin	Active			
🖉 Change Log	J Myers Bailey	☑● Bailey@supplier.com		-	Active			
	<u> </u>			A/R Rep				

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

plier contact management : Bailey Myers	80
Save & Close	
Identity	
First Name*	Language
Bailey	English
Last Name*	
Myers	
Email *	
Bailey@supplier.com	
Job Title 🛈	
en	
Supplier E2E_02 UKSUP_01	
Phone	Photo
Phone	Click or Drag to add a picture
[44] • 331 1239 xtension	
Cell / Mobile	
Country Code Area Code Cell Number	

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

Cleveland Clinic	General Info. Sourcing	Contracts			
< "D ☆	Company Info				
Company Info					
Contacts	Supplier Contacts				
Documents & Certs.	Select an Existing Co	ntact + Add a New Contact			
P2P Information	Name	(i) Username (i)	Job Title	Role(s)	Status
 [⊕] Qualifications [±] Financial Indicators 	🎻 🗊 Moore Ryan	✓• ryan.moore@supplier.com	Sales Manager	▼ Î Supplier Admin	Active
C Change Log	🧖 前 Myers Bailey	☑● Bailey@supplier.com		▼ ÎII 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.

Supplier contact management		₽ □ ×
	Save & Close	
Identity		
First Name *	anguage	
Pam	English	•
Last Name *		
Halpert		
Email *		
Pam@office.com		
Job Thite C		
	en	



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

Sele	ct an Existing Co	ontact	+ Add a New Contact				
	Name	(i) L	Jsername (i)	Job Title	Role(s)	s a	atu
P	Halpert Pam		<u>*</u>		A/R Rep Diversity		tiv
1	Moore Ryan	•	ryan.moore@supplier.com	Sales Manage	EDI Rep Executive	e / Management	tiv
1	Myers Bailey	•	Bailey@supplier.com		Ordering Quality R Sales Rep	ер	tiv

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

Supplie	er Contacts					
Sele	ect an Existing Co	ontact	+ Add a New Contact			
	Name	(i) U	sername (i)	Job Title	Role(s)	Status
"	Halpert Pam		÷		Customer Service Rep	Active
()	Moore Ryan	∑•	ryan.moore@supplier.com	Sales Manager	▼ Îli Supplier Admin	Active
"	Myers Bailey		Bailey@supplier.com		▼ Î 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	🖶 t 🗙
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.

Cleveland Clinic	General Info. Sourcing	Contracts			
く つ ☆	Company Info				
Company Info					
Contacts	Supplier Contacts				
Documents & Certs.	Select an Existing Co	ntact + Add a New Contact			
₹ P2P Information	Name	() Username ()		Role(s)	Status
iÔ Qualifications					
章 Financial Indicators	🖋 💼 Halpert Pam	☑ Pam@office.com		Customer Service Rep	Active
🖉 Change Log	1.0.11	-			
	/ Moore Ryan	 ryan.moore@supplier.com 	Sales Manager	Supplier Admin	Active
	A 💮 Myers Bailey	Seiley@supplier.com		•	Active
				A/R Rep	



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**.

Cleveland Clinic	General Info. Sourcing Contracts	🗘 🧕 Ryan M. 🗸
く つ 合	Company Info	My Profile
« Ecompany Info		
		③ My Scheduled Tasks
4 Contacts	Suppler Contacts	English \$
Documents & Certs.	Select an Existing Contact +- Add a New Contact	(¢ Logout
〒 P2P Information	Name ① Username ① Job Title Role(s) Status	
D Qualifications		
章 Financial Indicators	Elipert Pan E Panigotific.com Customer Service Active	