



Administrator Job Aid

From the Supplier Homepage page, click on the **User Profiles** link.

The screenshot shows the Supplier Homepage interface. On the left, there is a navigation menu with the following items: 'Supplier Homepage', 'Contact Us', 'My Alerts', 'Links', and a collapsed section 'Maintain Supplier Information'. Under 'Maintain Supplier Information', the items are 'Initiate Supplier Change', 'User Profiles' (circled in red), 'Addresses', and 'Contacts'. The main content area on the right is titled 'Welcome to the Supplier Homepage' and contains the following text: 'Welcome to the WorkCenter. This WorkCenter has one "Task Panel" and one "Work Area". The "Task Panel" is on the side displaying the pagelets assigned to the WorkCenter page and the "Work Area" displays transaction pages such as this page. Each pagelet may have the following actions depending on its configuration: Hide/Show, Reload, Personalize. Within each pagelet there may be "Open the content in a new window", "Collapses a group of links" and "Expands a group of links" actions available depending on the pagelet.'

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

The screenshot shows the Security page. At the top, it says 'Security' and 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there are two buttons: 'Find an Existing Value' and 'Add a New Value' (circled in red). Underneath is a 'Search Criteria' section with a dropdown arrow. Below that, there is a 'Search by:' field with the text 'User ID begins with' and an empty input box. Below that is a 'Limit the number of results to (up to 300):' field with the value '300' entered. At the bottom of the search section, there is a 'Search' button and a link for 'Advanced Search'. At the very bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.



Enter the **User ID** for the New User Profile and then click **Add**.

The screenshot shows a 'Security' section with two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these is a 'User ID' text input field. At the bottom of the section is an 'Add' button. Both the 'User ID' field and the 'Add' button are circled in red.

Enter the User Profiles **Description**.

Enter the **Operator Password** and repeat for **Confirm Password**.

Enter the User's **E-mail Address**.

Set the **Currency Code** to **USD**.

Set the **Rate Type** to **Current**.

The screenshot shows the 'Setup User' form. The 'Logon Information' section is circled in red. It contains the following fields: 'User ID' (pre-filled with 'Test_User'), 'Description', 'Account Locked Out?' (checkbox), 'Operator Password (Encrypted)', 'Confirm Password', '*E-mail Address', 'Language Code' (dropdown menu), 'Currency Code' (dropdown menu), and 'Rate Type' (dropdown menu). Below this section are three tables: 'User Roles', 'Supplier Access', and a 'Save' button with a 'Return to Search List' link. A legend at the bottom indicates '* Required Field'.



Click on the **Add a User Role** button.

Setup User

Logon Information

User ID: Test_User
Description: Test
(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: robert.apitz@ct.gov
Language Code: English
Currency Code: USD
Rate Type: Current

User Roles Personalize | Find | View All | First | 1 of 1 | Last

Role Name	Description
Add a User Role	

Supplier Access Personalize | Find | View All | First | 1 of 1 | Last

Supplier	
Add a Supplier	

Save Return to Search List

* Required Field

Select both of the User Roles and then click **OK**. If the User requires Supplier Contract Management or Budget Workbook roles, contact the State Agency to fill out the appropriate security forms. Those additional security roles will be added by the state agency.

Select Roles

Roles Personalize | Find | View All | First | 1-2 of 2 | Last

Role Name	Description
<input checked="" type="checkbox"/> CT_F_SUPPLIER_BASE	eSupplier Required Base Access
<input checked="" type="checkbox"/> CT_F_SUPPLIER_USER	eSupplier User

OK **Cancel**



Click on the **Add a Supplier** button.

Setup User

Logon Information

User ID: Test_User
Description: Test
(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): [masked]
Confirm Password: [masked]
*E-mail Address: robert.apitz@ct.gov
Language Code: English
Currency Code: USD
Rate Type: Current

User Roles

Role Name	Description	
CT_F_SUPPLIER_BASE	eSupplier Required Base Access	Delete
CT_F_SUPPLIER_USER	eSupplier User	Delete

Add a User Role

Supplier Access

Supplier
<input type="checkbox"/> Add a Supplier

Save Return to Search List

Select the **Supplier** checkbox and then click **OK**.

Select a Supplier

Supplier Names

Supplier
<input checked="" type="checkbox"/> CONTINUUM OF CARE INC

OK Cancel



Review all entered data and click **Save**.

Setup User

Logon Information

User ID: Test_User
Description: Test
(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: robert.apitz@ct.gov
Language Code: English
Currency Code: USD
Rate Type: Current

User Roles

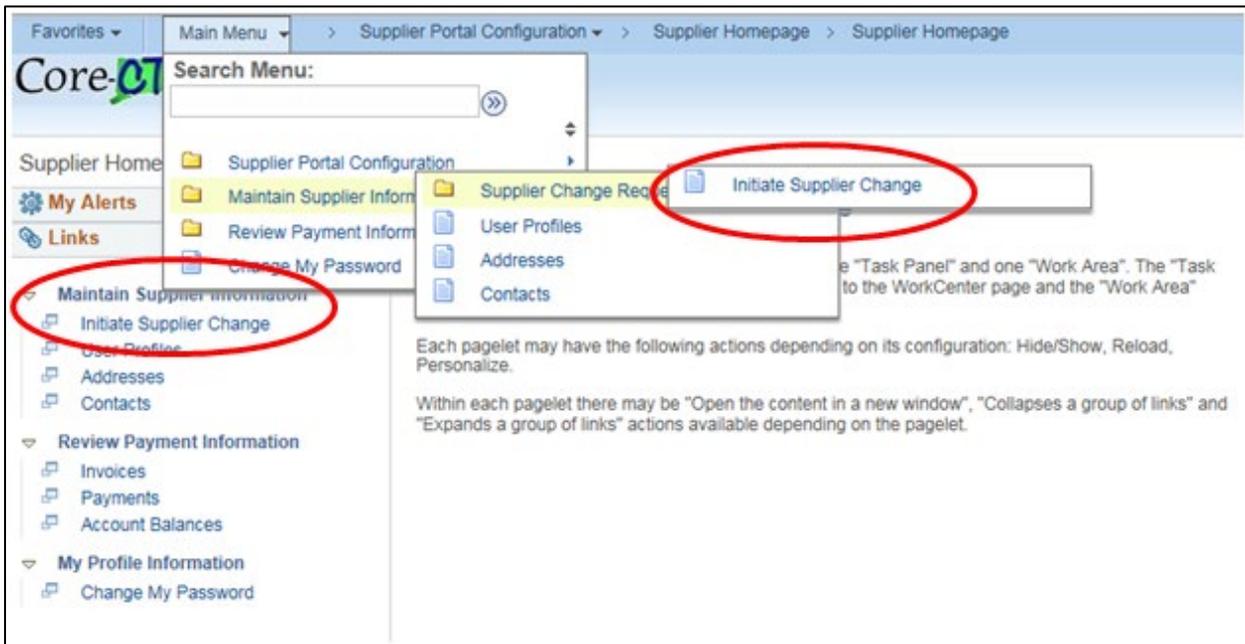
Role Name	Description	
CT_F_SUPPLIER_BASE	eSupplier Required Base Access	Delete
CT_F_SUPPLIER_USER	eSupplier User	Delete

Supplier Access

Supplier	
CONTINUUM OF CARE INC	Delete

Save Return to Search List

To submit an update request for an address or contact, navigate to **Initiate Supplier Change** using either the navigation bar or left hand link.





On the company profile train stop you may update the Payee Name, Profile Questions, and Add an Attachment. Only enter information for those fields that are changing, any field that is not updated will remain the same in your eSupplier profile.

Use the **Add Attachment** link to provide any documentation that supports the change request.

SetID	STATE	Supplier ID	Question ID
		0000021394	

Attached File	Attachment Description	Upload	View	Remove
1		Upload	View	<input type="checkbox"/>



To view all of the profile questions click on **Expand All** or use the arrow to expand the section.

Expand All Collapse All
▼ Profile Questions

Is your tax ID number a Federal Employer ID Number (FEIN) or a Social Security Number (SSN)?

Enter your complete legal name if different than Payee Name above.

Enter any other alternate names and indicate their proper use.

Attach your completed IRS W-9 form here.

Attachments (0) [Add/View Attachments](#)

Do you accept credit card payments?
Select all that apply.

 [Select](#)

For what purpose will the State of CT be providing payment? Be as detailed as possible. Include all types.
(Examples: Sale of commodities, Medical services, Attorney fees, Rental of Property, etc.)

Select Business Entity.

 [Select](#)

Enter email address for receipt of purchase orders. Required if purchase orders are issued.



The next step is the address page. Your eSupplier profile may contain several addresses. Some addresses will also contain alternate supplier names. The description field will display the delivery line of the address or the alternate supplier name. A description of **1099 Address** indicates that is the address which contains the legal business name if different from the payee name in the company profile.

To add a new address, click on the **Add New Address** button. The Address Information window does not permit the entry of alternate names. If an alternate name is required, you may enter that information in the profile question designated for alternate names or in the comments section of the update request.

*Phone Type	Location	Prefix	Telephone	Extension
Business Phone				

To request a change to an existing address, click on the edit icon.

Description	Address Line 1	Change Action	Change Effective Date	Edit
1880 SILAS DEANE HWY STE 202	ABC LANGUAGE SERVICES			
PO BOX 2754	PO BOX 2754			
DBA OFFICE SPECIALTIES	24 MAIN ST			
1099 ADDRESS	1880 SILAS DEAN HWY STE 202			



With the Address information box open you may change the address information, change or add phone numbers associated with this address, or add additional phone numbers. It is not necessary to update the description; this will be formatted by the Office of the State Comptroller during the approval of your request.

Address Information for 1880 SILAS DEANE HWY STE 202

Address Information

Description: 1880 SILAS DEANE HWY STE 202
Country: USA United States
Address 1: ABC LANGUAGE SERVICES
Address 2: 1880 SILAS DEANE HWY STE 202
Address 3:
City: ROCKY HILL
County:
Postal: 06067
State: CT Connecticut

Phone Information

Phone Type	Location	Prefix	Telephone	Extension	Remove
Business Phone			860/883-0102		<input type="checkbox"/>
FAX			860/555-1212		<input type="checkbox"/>

Add Phone

Approved Changes Take Effect: Approval Date Future Date

OK Cancel

The address information box does not display the alternate names. These names may be viewed in the address inquiry section of eSupplier.

Favorites Main Menu Supplier Portal Configuration Supplier Homepage Addresses

Core-CT

Supplier Homepage

My Alerts Links

Maintain Supplier Information
Initiate Supplier Change
User Profiles
Addresses
Contacts

Review Payment Information
Invoices
Payments
Account Balances

My Profile Information
Change My Password

Maintain Addresses
Current Addresses
OFFICE SYSTEMS OF CONNECTICUT INC 0000021394

Address List Personalize Find First 1-4 of 4 Last

Description	Status as of Effective Date		
1880 SILAS DEANE HWY STE 202	A	Edit	Inactive
PO BOX 2754	A	Edit	Inactive
DBA OFFICE SPECIALTIES	A	Edit	Inactive
1099 ADDRESS	A	Edit	Inactive

Add a New Address



Supplier Address

Maintain Addresses

Address Information

OFFICE SYSTEMS OF CONNECTICUT INC

Description 1099 ADDRESS

Country USA United States

Address 1 1880 SILAS DEAN HWY STE 202

Address 2

Address 3

City WETHERSFIELD

County Postal 06109

State CT Connecticut

Alternate Payment Name 1 JONATHAN B BIGGS

Alternate Payment Name 2 DBA OFFICE SYSTEMS OF CONNECTICUT INC

Email ID JONATHAN.B.BIGGS@SAMPLE.COM

Telephone Information Personalize | Find | First 1 of 1 Last

Type	Prefix	Phone	Ext
Business Phone		860/555-1212	

Date Change Will Take Effect: 03/06/2018

Return to Current Addresses

The next step is for contact information. In this area you may update existing contacts or add a new contact.

Company Profile Addresses **Contacts** Submit

Exit Save for Later Previous Next

Contacts for OFFICE SYSTEMS OF CONNECTICUT INC [Review Changes](#)

Name	Address	Change Action	Change Effective Date	Edit
John Biggs				
Tracy Smith				

Add New Contact

[Review Changes](#)

Exit Save for Later Previous Next



To add a new contact, click on the **Add New Contact** button. Always include the **First Name**, **Last Name**, **Email Address**, and **Contact Type**. You may add additional phone numbers to the contact by selecting the **Add Phone** button.

Add New Contact

Contact Information

Description

* First Name

* Last Name

Contact Title

*Email Address

URL

Contact Address

Contact Type

Phone Information

*Phone Type	Prefix	Telephone	Extension
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Approved Changes Take Effect: Approval Date
 Future Date



To update an existing contact, select the contact using the edit icon. Only enter information for those fields that are changing, any field that is not updated will remain the same in your eSupplier profile.

Phone Type	Prefix	Telephone	Extension	Remove
Home Phone		860/555-1212	34	<input type="checkbox"/>

To remove a contact, select the contact using the edit icon, select the **Remove Contact** checkbox, and then click **OK**.

Phone Type	Prefix	Telephone	Extension	Remove
Business Phone		860/555-1212	34	<input type="checkbox"/>



Changes to addresses and contacts may be future dated by selecting Future Date and entering a date when the changes will be effective.

Approved Changes Take Effect: Approval Date
 Future Date

The final stop is the Submit page. Use the review button to verify the requested changes to be made. If a change is needed, return to the appropriate trainstop and make any necessary changes. Once the review is complete, enter the **Audit Reason Code** of Supplier Approval, enter any additional comments in the **Comments** field, select **Confirm Changes**, and then click **Submit**. Your request will be submitted to the Office of the State Comptroller for review and approval.

Company Profile Addresses Contacts **Submit**

Exit Save for Later | Previous Next

Review and Submit Changes for OFFICE SYSTEMS OF CONNECTICUT INC

Use the "Review" button to review changed information.
Use the "Submit" button to submit your change request.

Email communication regarding this request will be sent to:

*Audit Reason Code ▼

Comments
254 characters remaining

Confirm Changes

Review Withdraw Submit

Exit Save for Later | Previous Next



Your request will be displayed in eSupplier as Pending Approval. If you have any questions about the status of your request, contact osc.apdvf@ct.gov and include the request ID in your email.

Supplier Change Request Selection

Select Supplier

*Supplier: OFFICE SYSTEMS OF CONNECTICUT INC

Create New Request

Pending Change Requests

Supplier ID	Name	Request ID	Change Status	Date
0000021394	OFFICE SYSTEMS OF CONNECTICUT INC	000000000000055	Pending Approval	03/20/2018

You will be notified by Email when your request has been approved.

