



# ACCESSING VENDOR PORTAL

VENDOR PORTAL GENERAL NAVIGATION

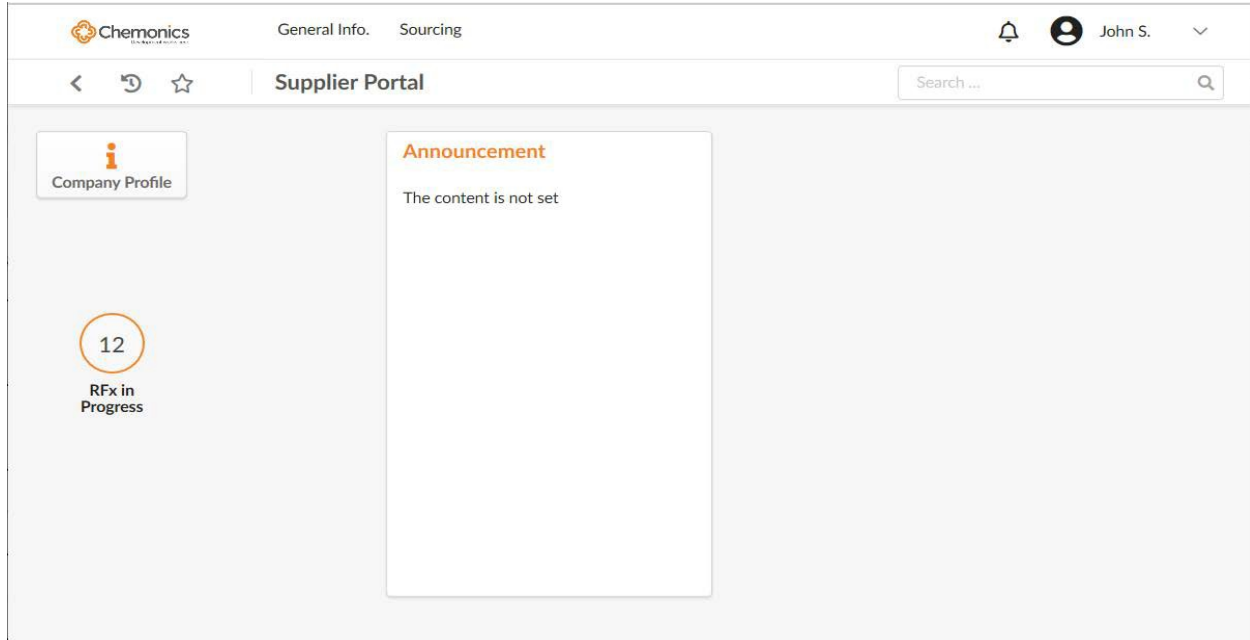


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## Homepage tour

Once logged in to the ARTMIS Vendor Portal, you will access your home page.



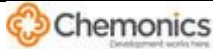
**Note:** Home page contents and menu options may vary depending on the modules that are enabled in the application. Based on these parameters, functions described here may be unavailable.

### Navigating around and accessing things

Navigation controls are laid out across the top of the screen:




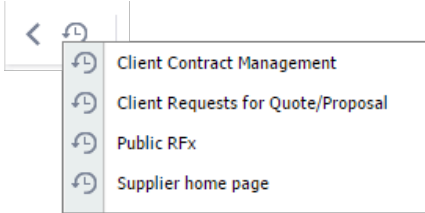


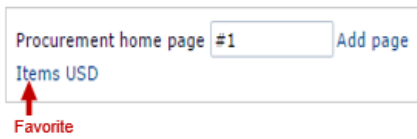





The table below gives a detailed description of each navigation control:

Navigation control	Description
 Home icon (logo)	Click this at any time to return to your home page.









# Accessing ARTMIS Vendor Portal

## Vendor Portal General Navigation

Menu bar	<p>These menu options provide you with access to the different ARTMIS Vendor Portal modules and functionalities that fall within the scope of your user profile.</p> <p>The display of menus and menu options may also vary according to the modules that have been activated in your application.</p>
 Previous page / History	<p>Use  to go back to the previous screen.</p> <p>Click  for a list of the screens you have recently visited. You can click on any of the items in the list to go directly to that screen.</p> 
 Favorites	<p>Favorites management</p>  <p>When adding a search page as a favorite, all selected search filters will be saved with the favorite.</p> <p>Once created, the favorite can be recalled using the same <i>Star</i> icon.</p>  <p>On a page that has already been saved as a favorite, the <i>Star</i> icon will be yellow </p> <p>To edit or delete a favorite, hover the favorite in order to display the icons</p> 
 Search ...	Search tool





## Accessing ARTMIS Vendor Portal


### Vendor Portal General Navigation


 John S.  <ul style="list-style-type: none"> <li> My Profile</li> <li> My pending validations</li> <li> My Scheduled Tasks</li> <li> English </li> <li> Logout</li> </ul>	<b>Menu option</b>	<b>Description</b>
	My Profile	View your Account Profile
	My scheduled tasks	Lists all Client task assignments
	Language	The language that the ARTMIS Vendor Portal displays in (overrides your user default language set in your My account space).
	Logout	Click to exit the ARTMIS Vendor Portal

### Main content

The main content area consists of various blocks or webparts that either present important information or give you an overview of and quick links towards your ongoing activities or tasks.


General Info. Sourcing
  John S. 

< ↺ ☆
Supplier Portal
Search ... 



Company Profile

12

RFX in Progress

Announcement

The content is not set

## Ergonomics of common pages

While using the ARTMIS Vendor Portal you'll come across Search pages and Data Record pages. These two types of pages are ubiquitous throughout the application and follow the same overarching ergonomic principles.

### Search pages

The screenshot shows the 'Manage Proposals' page in the ARTMIS Vendor Portal. At the top, there's a navigation bar with 'General Info.' and 'Sourcing' tabs. Below this is a search bar and a 'Manage Proposals' title. The main area contains a search filter section with three tabs: 'Keywords', 'Proposal Progress', and 'RFx Status'. The 'RFx Status' tab is selected, showing a dropdown menu with 'Open for Bidding' and a 'Q Search' button. Below the filters is a table of proposals. The table has columns: 'Proposal Progress', 'Sourcing Project', 'Lot #', 'Round #', 'RFx Name', 'RFx Status', 'Remaining Time', 'Begin (UTC-4)', 'End (UTC-4)', 'My Bid', and 'Forum'. Three rows of proposals are visible, each with a status icon (red circle with a dot) and a text label (e.g., 'Awaiting Acknowledgment'). Red circles 1, 2, and 3 are overlaid on the image to highlight specific UI elements: 1 points to the search filter section, 2 points to the first row of the results table, and 3 points to the 'Q Search' button.

Search pages are typically comprised of the following parts

1	Search filters area
2	Results list
3	Action buttons

### Search filters area

Available on all search pages, this area contains the search filters you can use to narrow your search.



The screenshot shows the search filters area. It includes a 'Keywords' text box, an 'Invoice Type' dropdown menu, an 'Order' text box, a 'Contract' text box, a 'Currency' dropdown menu, a 'Status' dropdown menu, a 'Date' field with a calendar icon, a 'Min. Amount' text box, and a 'Max.' text box. There are also 'Q Search' and 'Reset' buttons.

All search filter areas include a Keywords search box that allows you to perform text search on all or part of a label or ID number.

You can continue as many filters as you wish. Question mark icons right next to some of the filters offer extra clarifications about how to use these filters

When you are done defining your search filters, use the following buttons to:

## Accessing ARTMIS Vendor Portal Vendor Portal General Navigation

	Launch the search, while applying the selected filters. The search results list is updated according to found items.
	Cancel the filters you have selected (and go back to the default filters).

### Results list

The results list presents the data that matches the selected search filters,

### Sorting list items

Most columns can be sorted by ascending or descending from the column header. You can identify which ones allow for sorting by hovering your cursor over the column header and seeing if it becomes underlined; if the column is sortable, your cursor will turn into a hand and the header label will be underlined. Once the list is sorted by a column, this is indicated by the presence of a triangle to the right of the header label. The triangle orientation indicates the sort order: (ascending or alphabetical order) or (descending or counter-alphabetical order); click the label again to change the sort order.

Proposal Progress	Sourcing Project	Lot #	Round #	Rfx Name	Rfx Status	Remaining Time	Begin (UTC+1)	End (UTC+1)	My Bid	Forum
Awaiting Acknowledgment	BPM000308	1	2	GHSC-PSM-EM Full tracked RFP - V1.1	Open for Bidding	13d 02h 16min 49s	2/29/2020 6:30:00 PM	4/29/2020 7:30:00 PM	0.00 USD	
Awaiting Acknowledgment	BPM000219	3	1	ARV RSO42 RDC ZA lot	Open for Bidding	13d 06h 46min 49s	3/18/2020 1:38:14 PM	4/30/2020 12:00:00 AM	0.00 USD	
Awaiting Acknowledgment	BPM000219	2	1	ARV RSO42 RDC AE lot	Open for Bidding	13d 06h 46min 49s	3/19/2020 8:59:24 AM	4/30/2020 12:00:00 AM	0.00 USD	
Awaiting Acknowledgment	BPM000219	1	1	ARV RSO42 RDC lot	Open for Bidding	13d 06h 46min 49s	3/19/2020 8:58:06 AM	4/30/2020 12:00:00 AM	0.00 USD	
Awaiting Acknowledgment	BPM000216	1	1	ARV RSO42 RDC grid	Open for Bidding	13d 06h 46min 49s	3/18/2020 1:36:04 PM	4/30/2020 12:00:00 AM	0.00 USD	
Awaiting Acknowledgment	BPM000215	1	1	ARV RSO42 UoM grid	Open for Bidding	13d 06h 46min 49s	3/18/2020 1:02:07 PM	4/30/2020 12:00:00 AM	0.00 USD	
6 Result(s)										

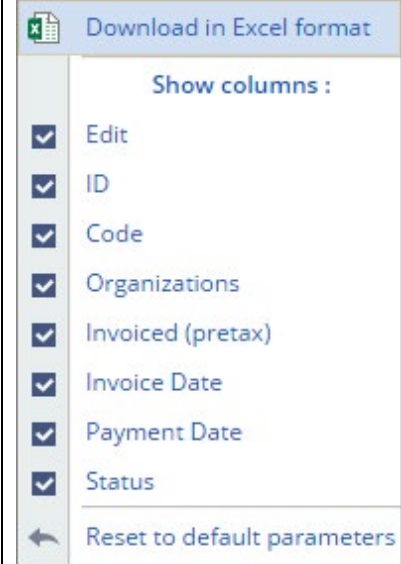
### Performing actions on list items

What you can do with list items will vary with item type and context, but the following actions will be available in most cases:

	Open target item in <u>main window</u> (lets you access the selected item's detailed sheet and edit its data)
Clickable label or number	Open target item in a <u>secondary window</u>
	Delete item (deletion becomes effective only after your confirmation)
	Some actions can be performed on a selection of items. In such cases, a checkbox will be available for each item: select the checkbox of the desired items, then click the action button.

### Showing, hiding, and reordering columns: downloading in Excel format

Right-click any of the column headers of the results list to access a menu that enables you to perform the following actions:

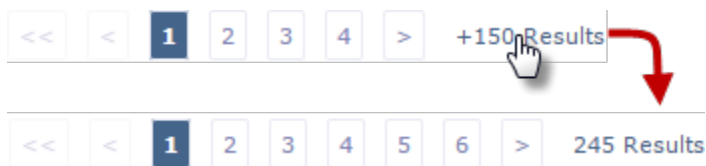
	<p><b>Showing/Hiding columns:</b> Select/Unselect a column label's checkbox in the menu to show/hide the column in the results list.</p> <p><b>Reordering columns:</b> Use drag-and-drop on column labels in the menu to reorder columns in the results list.</p> <p>You can revert anytime to original settings by selecting <b>Reset to default parameters</b>.</p> <p>The right-click menu also allows you to <b>download the displayed list in Excel format</b>.</p>
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### Number of results

The number of found results is indicated in the bottom left corner of the list; when found results are numerous, they are split up into various pages with a limit of 15 results per page; To navigate between pages, you may click directly into the page link or click the chevrons to go to the next, previous, or first page of the search:



For performance sake, the number of displayed results is limited to 150 by default. When found results exceed this limit, the number of results indicates: +150 Results. Click this link to access the full number of results.



### Action buttons

In search pages, action buttons may or may not be present, depending on the type of item the page is dedicated to.

Available action buttons are displayed in the upper mid-section of the page. When present, action buttons will generally allow you to create new items.

Some actions are meant to be applied to identified items and require that you first select the items before performing the action. In such cases, a checkbox column will be available in the results list.

## Data record pages

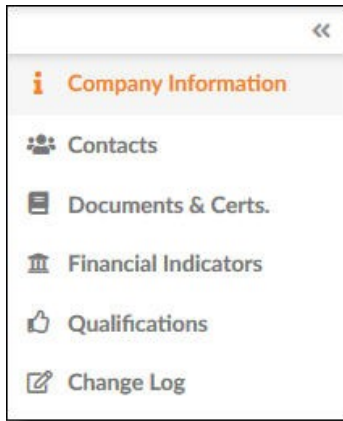
### Tabs

Tabs structure data into coherent, thematic sets.

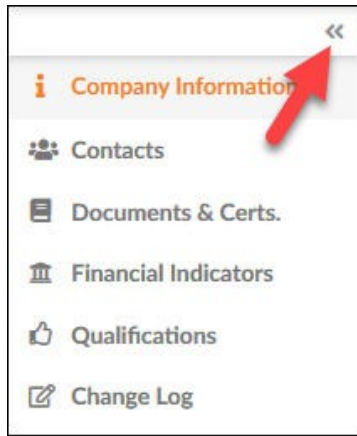
Tabs are laid out vertically in a collapsible panel that is docked on the left-hand side of the window. By default, the panel is collapsed to its minimal size and only shows tab icons.



When you click on the chevrons , it expands to show tab labels.



You can use the chevron icon available in the upper right corner of the panel to collapse it again.



You must save the data you wish to keep before leaving the page in every instance. There is not an auto save function; to save current tab, use the **Save** or **Save and close** buttons.

To save a page, you must first fill in the required fields (these are marked with a red asterisk \*).

Last Name *	REYNOLDS
First Name *	Tom

### Action buttons

In a data record, available action buttons depend on context: for instance, the Save button may be available but rendered useless once an item has been approved and has become read-only.

Available action buttons are displayed in the upper mid-section of the page.

Red and green buttons are generally linked to approval workflows.

## Your My Profile Space

Access “My Profile” by clicking your User ID in the top right corner of the screen and then selecting “My Profile.” Your account allows you to manage some important settings listed below:

The screenshot displays the 'Profile Management : John Snow' page in the ARTMIS Vendor Portal. The page is divided into several sections for user information and preferences.

**Identity Section:**

- Title: [Dropdown]
- First Name: John
- Last Name: Snow
- Email: siem@lizardstudio.eu
- Internal Identifier: [Field]
- Position: [Field] en
- Supplier: Pharma Company

**Phone Section:**

- Phone: [Field]
- Cell Phone: [Field]
- Fax: [Field]

**Photo Section:**

- Add a picture: [Button]

**Last Connection Section:**

- Last Connection: 4/2/2020 at 11:21 AM with IP address: 100.15.142.193

**Address Section:**

- Address Label: [Field]
- Address Line 1: Dummy
- Address Line 2: [Field]
- Zip Code: [Field]
- City: [Field] en
- Country: UNITED STATES
- State/Province: [Field]

**Password Section:**

- Current password: [Field]
- New password: [Field]
- Confirm new password: [Field]
- Update: [Green Button]
- Cancel: [Red Button]

**My preferences Section:**

- Default lang: English
- Default country: UNITED STATES
- Time Zone: [Field]
- Currency: USD
- Accessibility mode: [Checkbox]
- Format lang: English (United States)
- Date format: 4/2/2020 12:24:17 PM
- Number format: -1,234,567.89

### Identity

Stores your contact information



## Password

Allows you to change your ARTMIS Vendor Portal password (applicable rules are stated)

## My preferences

Allows you to control system settings and formats such as time zone, language, currency, date and number formats

Preference settings are explained in the table below:

Field	Description
Default language	The default language is English, and this may not be changed.
Default country	This will be blank by default allowing each user to select his/her country.
Time zone	<p>As it is typically used in an international environment, the ARTMIS Vendor Portal needs to know the time zone you operate from to properly manage time. The System will default to be EST.</p> <p>An alert message prompting you to set your time zone in your <i>My account</i> space will display in the upper banner of the ARTMIS Vendor Portal window as long as it remains undefined.</p> <div> Please set your time zone in your account settings </div> <p>In the meanwhile, the system will attempt to automatically infer your time zone by comparing the current lag between your browser and your default country against the list of time zones by country that the application comes pre-seeded with.</p> <p>If the time zone set in your <i>My account</i> space and your browser's current lag do not match, this will be acknowledged by an alert message</p>
Default currency	<p>This will be used to default the currency wherever applicable. The default will be set to USD.</p> <p>For instance, when you order a non-catalog item, the currency in the item creation form is preset with your default currency.</p>
Format language	<i>Format language</i> will be defaulted to English. You cannot override the format language.
Date format / Number format	<p>The <i>Date format</i> determines the order in which the year, month and day are represented, whether the 24-hour clock or 12-hour clock is used, and which separators are used.</p> <p>The <i>Number format</i> specifies the decimal and thousands separators to be used, as well as the placement of the negative sign.</p> <p>Calculations are based on the number format defined here, so if you're obtaining weird results, say for instance, when entering an invoice, you may want to check whether you are entering your figures in keeping with the number format set in your account.</p>

## About updating your company data

Depending on the application's configuration, once your company data is approved, either you are free to update your data as you want (in which case fields are editable), or updates require an approval (in which case fields are read-only and you must create a change request).

## Accessing your company information

Select the menu *General Info. / My Company Information*.

Your Supplier Record will display. It contains data useful for your relationship with the buying organization. Thus, you should make sure you complete it and update it when necessary.

The screenshot displays the 'Company Info' page in the Chemonics Vendor Portal. The page is divided into two main sections: 'Company' and 'Address'. The 'Company' section contains fields for Legal Name, Gov't I.D.# (EIN SIREN), Company Name, SIRET #, Website, Tax ID Number, Legal Structure, DUNS, NAICS Code, and Year Founded. The 'Address' section contains fields for Address Label, Address Line 1, Address Line 2, Zip Code, City, Country, and State/Province. The user is logged in as John S. and the page has a search bar and a 'Save' button.

Company		Address	
Legal Name	Gov't I.D.# (EIN SIREN)	Address Label ①	
Company Name	SIRET #	Address Line 1	
Website	Tax ID Number	Address Line 2	
Legal Structure	DUNS	Zip Code	City
NAICS Code	Year Founded	Country	State/Province

Your Supplier Record contains 6 tabs, which we describe in this section.

## Identity Tab

This tab enables you to add and update information such as your company name, URL addresses of the company's website and its catalog, the address of its headquarters, etc.

The screenshot displays the 'Company Info' page in the Chemonics Vendor Portal. The page is divided into two main sections: 'Company' and 'Address'. The 'Company' section includes fields for Legal Name, Gov't I.D.# (EIN SIREN), Company Name, SIRET #, Website, Tax ID Number, Legal Structure, DUNS, NAICS Code, and Year Founded. The 'Address' section includes fields for Address Label, Address Line 1, Address Line 2, Zip Code, City, Country, and State/Province. The page also features a sidebar with navigation options like 'Company Information', 'Contacts', 'Documents & Certs.', 'Qualifications', and 'Change Log'. At the top, there are tabs for 'General Info.' and 'Sourcing', and a user profile for 'John S.'.

Company	
Legal Name	Gov't I.D.# (EIN SIREN)
Company Name	SIRET #
Website	Tax ID Number
Legal Structure	DUNS
NAICS Code	Year Founded

Address	
Address Label	
Address Line 1	
Address Line 2	
Zip Code	City
Country	State/Province

## Internal Contacts Tab

From the Internal Contacts Tab, you are able to create contacts for key personnel from within your organization. You may also define supplier roles so that the buying organization may connect with the appropriate person, as needed.

Supplier Admins will be identified by the Supplier Relations Management team (SRM). The SRM team will also have the ability to create new contacts under a supplier. Suppliers need to communicate with the SRM team to issue their login credentials.

The screenshot displays the 'Internal Contacts' page in the Chemonics Vendor Portal. The page shows a table of contacts with columns for Contact, Login, Position, Role, and Status. A 'Select Existing Contact' button and a '+ Create Contact' button are visible. The table lists two contacts: 'Snow John' and 'Gottumukkala Santosh'. The page also features a sidebar with navigation options like 'Company Information', 'Contacts', 'Documents & Certs.', 'Qualifications', and 'Change Log'. At the top, there are tabs for 'General Info.' and 'Sourcing', and a user profile for 'John S.'.

Contact	Login	Position	Role	Status
Snow John	jsnow		Supplier admin	Active
Gottumukkala Santosh				

## Documents & Certs Tab





















This tab is a space that allows you to provide and update legal or regulatory documents (certificate of incorporation, insurance for liability, etc.), as well as other documents required by the client company. Document types marked with a red asterisk (\*) are mandatory.

Each document category presents the following information:


Column	Description
(Right-click on the header row)	Accesses the following features: <ul style="list-style-type: none"> <li><i>Show/Hide columns</i>: allows you to select the columns you want to show or hide in the list</li> <li><i>Download in Excel format</i>: Allows you to download the list in MS Excel format</li> </ul>
	Accesses document settings (file selection and upload, validity dates and compliance approval)
	Adds a document
File link	Attachments. Click a document's icon to download it
	Accesses the history of documents uploaded by the supplier for the selected type.
Type	Document type
Label	Document title
Validity begin date	Validity dates of the document
Validity end date	





## Accessing ARTMIS Vendor Portal

### Vendor Portal General Navigation

Owner	Document owner (the document owner is defaulted to the user who uploaded it, but the owner can be reassigned)												
Status	<p>Document compliance status</p> <p>The document’s compliance status is displayed in the form of a visual indicator (red cross or green check mark) and is further specified in a tooltip:</p> <div><div> Compliant</div><div> Being created, to be checked or Non-compliant</div></div>												
Validity	<p>Document validity in relation to its Begin and End validity dates</p> <p>Auto-calculated and read-only</p> <p>3 possible validity statuses:</p> <div><div> Valid</div><div> Impending expiry: the document has reached the alert delay defined for the document type</div><div> Invalid: the document is not in its validity period (end date exceeded or begin date not reached)</div></div> <p>When the end date is exceeded, it will display in red characters</p> <table><tr><th>Validity end date</th><th>Owner</th><th>Status</th><th>Validity</th></tr><tr><td>10/28/2016</td><td>Adrian Moriano</td><td></td><td></td></tr><tr><td> 6/29/2016</td><td>Adrian Moriano</td><td></td><td></td></tr></table>	Validity end date	Owner	Status	Validity	10/28/2016	Adrian Moriano			 6/29/2016	Adrian Moriano		
Validity end date	Owner	Status	Validity										
10/28/2016	Adrian Moriano												
 6/29/2016	Adrian Moriano												

### Attaching documents

- Click the **Add document** button in the desired category frame, or else click the **Add** icon  associated with the document type you wish to upload.

LEGAL DOCUMENTS									
<div style="border: 2px solid orange; padding: 2px; display: inline-block;">Add legal documents</div>									
	Att.	Type	Label	Validity begin date	Validity end date	Owner	Status	Validity	
		URSSAF	W9	5/2/2016	10/28/2016	Adrian Moriano	✓	<span style="color: orange; font-size: 24px;">●</span>	
		Form W9	W9	1/1/2016	6/29/2016	Adrian Moriano	✓	<span style="color: red; font-size: 24px;">●</span>	
2 Result(s)									

- The **Edit document** window displays.

The screenshot shows a web form titled "Edit document : Legal Documents". At the top right, there are three buttons: "Save" (orange), "Save & Close" (orange), and "Archive" (green). The form is divided into several sections:

- Description**: Contains fields for "Document Type \*" (a dropdown menu), "Status" (a text field with "Draft" entered), "Document Name" (a text field with "en" entered), "Begin Date \*" (a date picker), "Expiration Date" (a date picker), "Document \*" (a file upload area with a "Click or Drag to add a file" button), and "Document's owner" (a text field with "SNOW John" entered).
- Follow up**: Contains three date picker fields: "Notification Date", "Date Archived", and "Request Date".
- Comments**: A large text area at the bottom with the placeholder text "Add a comment here".

3. Select the type of the document you want to create.
4. Give the document a name.
5. Upload your document. To do so, choose one of two methods:
6. Click the grayed area to the right of the document field and select the desired file in the window that is displayed.
7. Locate the desired file in your file explorer and drag-n-drop it to the grayed area to the right of the document field.
8. Enter the document's validity dates (at least the validity start date).
9. Save and close

## Qualifications Tab

This tab is a space that allows you to provide and update geographical information as well as commodity information. The information captured here are the geographies that the supplier can supply to and the commodities that the supplier produces.

Please note that just because a supplier produces various types of commodities, that does not guarantee that GHSC-PSM will be able to procure all of the commodities. Based on the documentation provided, the SRM team will make the final determination on for which commodities the supplier is qualified.

Additionally, there is space for the supplier to add comments.

## Accessing ARTMIS Vendor Portal Vendor Portal General Navigation

The screenshot displays the 'Company Info' page in the ARTMIS Vendor Portal. The interface includes a top navigation bar with the Chemonics logo and user information (John S.). A sidebar on the left provides navigation options: Company Information, Contacts, Documents & Certs., Qualifications, and Change Log. The main content area features a 'Company Info' header with a search bar and three action buttons: 'Save', 'Answer Questionnaire', and 'Request Information Change'. Below this, there are two main sections: 'Additional Information' and 'Customer References'. The 'Additional Information' section contains three input fields: 'Geographical Regions' (a dropdown), 'Supplier Commodities' (a dropdown), and 'Comment (Supplier)' (a text area). The 'Customer References' section includes an 'Add Reference' button. To the right of these sections is a 'Questionnaires' panel showing '0 Result(s)'.

## Updating your data using change requests

### Overview

Supplier change requests are used to implement and manage a change process for supplier data.

Note: Basic data (i.e. contact creation, address updates, etc.) can be changed by suppliers or through the SRM team. Changes to key information such as legal name or DUNS # require special consideration and will have a separate change request button to initiate the workflows. While this is under review, it is correct that the supplier record will be locked and unavailable for awarding.

- To update key information, you need to create a change request.
- A change request is a copy of your company data record that has its own approval workflow.
- Once the change request is approved, modifications are committed to your original company data record.
- Only one change request can ever be in progress at any given time; in the meantime, and until the change request is approved or cancelled, your company data record is locked.

### Creating, filling and submitting a change request

Access the Supplier Portal and go to the **General Information / My Company Information** menu.

Your company's information is displayed.

Click on **Request Information Change** button. A new change request is displayed.

## Accessing ARTMIS Vendor Portal Vendor Portal General Navigation

Chemonics

General Info Sourcing

John S.

Company Info

Save Answer Questionnaire Request Information Change

Company Information

Contacts Documents & Certs. Qualifications Change Log

Company

Legal Name Gov't I.D.# (EIN SIREN)

Company Name SIRET #

Website Tax ID Number

Legal Structure DUNS

NAICS Code Year Founded

Address

Address Label ①

Address Line 1

Address Line 2

Zip Code City

Country State/Province

Note: If a change request is already ongoing for your company data, a message says so in the **Identity** tab and your company data is locked until the ongoing request is approved or cancelled. (**Create a change request** button is unavailable)

Identity

Information

Contacts

Alerts (2)

⚠ - Change request in progress for this supplier

⚠ - One or more mandatory documents to upload (Tab Documents)

On the change request, fill the fields you wish to change , ① provide a reason for change request ② or you will not be able to submit your change request and when done, click on the **Submit for Approval** ③ button.

## Accessing ARTMIS Vendor Portal Vendor Portal General Navigation

The screenshot shows the 'Company Change Request' form in the Chemonics Vendor Portal. The form is divided into three main sections: 'Reason for Change Request', 'Company', and 'Address'. The 'Reason for Change Request' section has a text area for the reason, highlighted with a red box and a red circle '2'. The 'Company' section contains fields for Legal Name, Gov't I.D.# (EIN SIREN), Company Name, SIRET #, Website, Tax ID Number, Legal Structure, DUNS, NAICS Code, and Year Founded. The 'Address' section contains fields for Address Label, Address Line 1, Address Line 2, Zip Code, City, Country, and State/Province. The 'Address' section is highlighted with a red box and a red circle '1'. At the top of the form, there are buttons for 'Save', 'Cancel', and 'Submit for Approval'. The 'Submit for Approval' button is highlighted with a red box and a red circle '3'.

This will launch the change request's approval workflow and approvers will be notified that their approval is required. You'll have to wait until your change request is approved to see new values appear in the Supplier Record.