Buyer’s Guide
for Using Supplier Connection

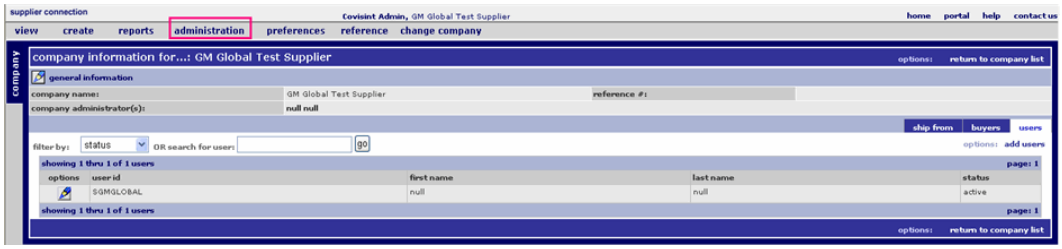
Table Of Contents

HELP FOR LOGGING IN TO SUPPLIER CONNECTION

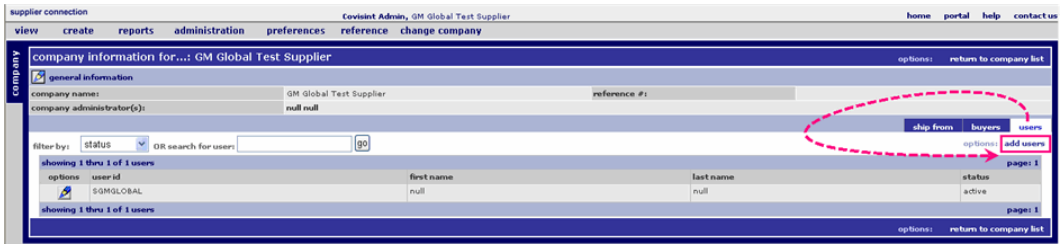
Adding New Users to Supplier Connection

You must be a Supplier Connection Administrator to perform this task, and the user must have already requested and been approved for the Supplier Connection application.

1. Log in to Supplier Connection.



2. Click **administration.**
3. Click **administer company** from the administration drop down menu. The Company Information screen is displayed.



4. Click **users** tab.
5. Click **add users**. The **add new users screen** is displayed.

Add New User Screen

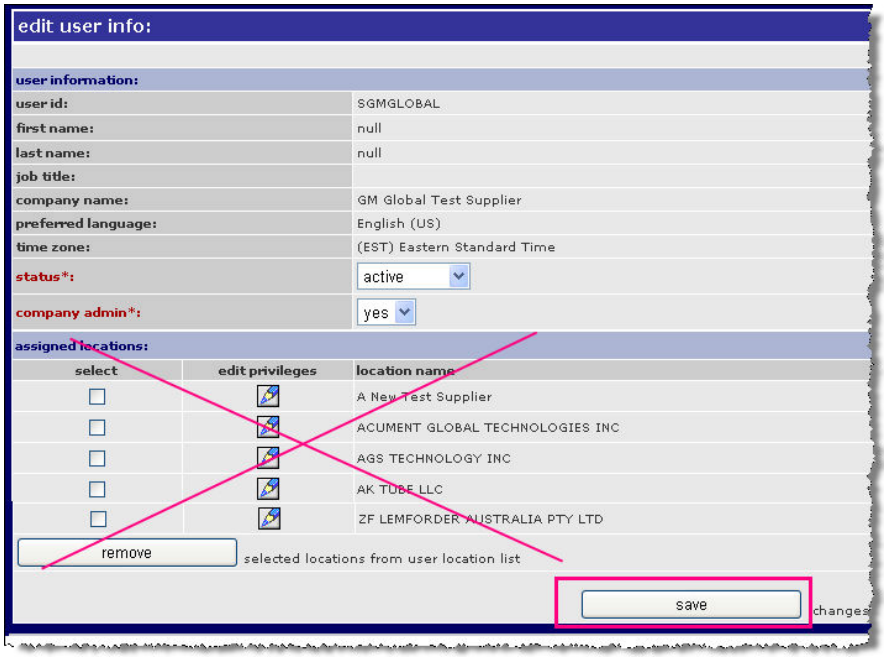
You can only add users into Supplier Connection that meet the following criteria:

- first, user's access has been granted to the Covisint Portal.
- second, user's access has been granted to the Supplier Connection service package within the portal.

Register for a User ID at: http://us.register.covisint.com/start.html The self registration request for a new User ID will be routed to your internal Security Administrator for approval.

6. Key in one portal user id in each open text field.
7. Click **add users.** The screen refreshes, and each user is added to the list.
8. Click in the options column next to the user id you added. The edit user info screen is displayed.
9. Select **active** in the status drop down menu.
10. Select **yes** from the company admin drop down menu if you wish to assign the Administrator role to the user.

Ignore all other options on this screen.



11. Scroll to the bottom of the screen and click **Save**.
12. Optionally, assign the Company Administrator role to the user.
13. Optionally, assign a user to a ship-to location.

RESULT:

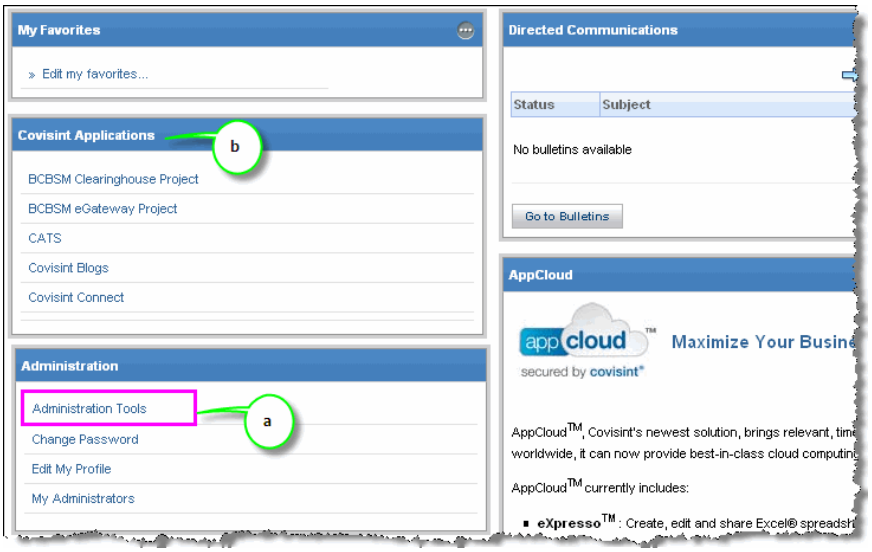
You have successfully added new users to Supplier Connection.

Requesting Access to Supplier Connection

Complete the steps below to request access to Supplier Connection.

The steps below assume your company already has access to Supplier Connection, and that you already have a portal user name and password.

1. Log in to the portal.



2. Click **Administration Tools** from the list of applications on the left. (a)
3. From the **My Profile** drop down menu, click **Request Service Package**.
4. Click **request** next to the package you wish to request.
5. Enter the *reason for request* in the open text box.
6. Click **continue**.
7. Repeat steps 2 - 6 as necessary for additional service packages.

RESULT:

You have successfully requested access to Supplier Connection. Your administrator must perform two steps:

- approve your request (You will be notified by email when a decision had been made)
- add you to the supplier connection application

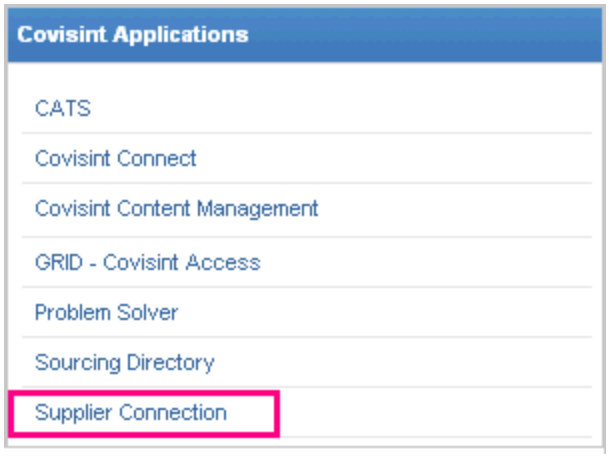
If Supplier Connection is:

- not listed in your applications (a), then you most likely have not been approved access to the service package.
- displayed in your list of applications (b), but when clicked you receive an error, then most likely you have been approved access to the service package, but the administrator has not yet added to you Supplier Connection application.

Logging in to Supplier Connection

The steps below assume that you have already been approved for access to and have been set up within Supplier Connection by the Administrator.

1. Navigate to the portal login screen. (http://covisint.com/loginAuto.shtml)
2. Key in your User Name and Password in the open text fields.
3. Click **Submit.** The screen refreshes, and the logged in portal page is displayed.



4. Click **Supplier Connection** from the list of Covisint Applications on the left side of the screen. The screen refreshes and Supplier Connection is launched.

RESULT:

You have successfully logged in to Supplier Connection.

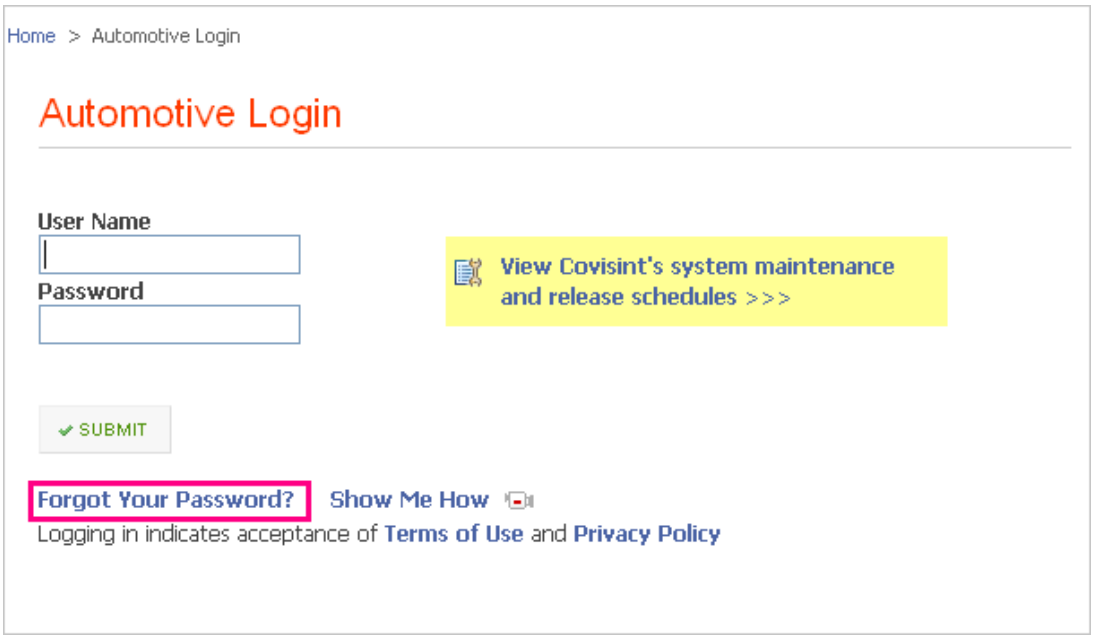
How to Request Access to Supplier Connection

1. Log in to the Administration / CCA tool of the portal.
2. From the **My Profile** drop down menu, click **Request Service Package**.
3. Click **request** next to Supplier Connection.
4. Enter the *reason for request* in the open text box.
5. Click **continue**.
6. Repeat steps 1 - 5 as necessary for additional service packages.

Forgot My Password

Complete the following steps to reset your password when you have forgotten or locked your password.

1. Navigate to the portal login screen. (http://covisint.com/loginAuto.shtml)



2. Click **Forgot Your Password?**

3. Key in your *User ID* and then click **continue**.

4. Key in the *answer* to each security question in the corresponding open text fields. Your answers must match exactly that which you entered during your initial registration, including case and space sensitivity. (The Answer field is a case-sensitive field. You must remember exactly how you keyed in the answer during registration).

5. Click **Submit**. The first half of the new, system generated temporary password is displayed on the screen. The second half of this temporary password has been emailed to the address you entered during registration.

6. Write down the first half of the temporary password from the screen, and obtain the second half of the temporary password from your email. This temporary password is a single use password, and is a combination of letters and numbers totaling eight characters (i.e., 9AG877BO). The user is forced to create a new password the next time the user attempts to login, as in steps 7 - 13 below.

7. Click **Login** from the Password Reset screen.

8. Key in your User ID and 8-digit temporary password in the corresponding fields. (Recall that the first 4 digits were displayed on the screen, and the remaining 4 digits were emailed to the address with which you registered in the system).

9. Click **Login**. The Update Password screen is displayed.

10. In the Current Password field, key in the complete 8-digit temporary password you have just obtained.

11. In the New Password field, key in the *new password* you wish to create.

12. In the Confirm New Password field, key in the *new password* you created in the previous steps.

13. Click **Update.**

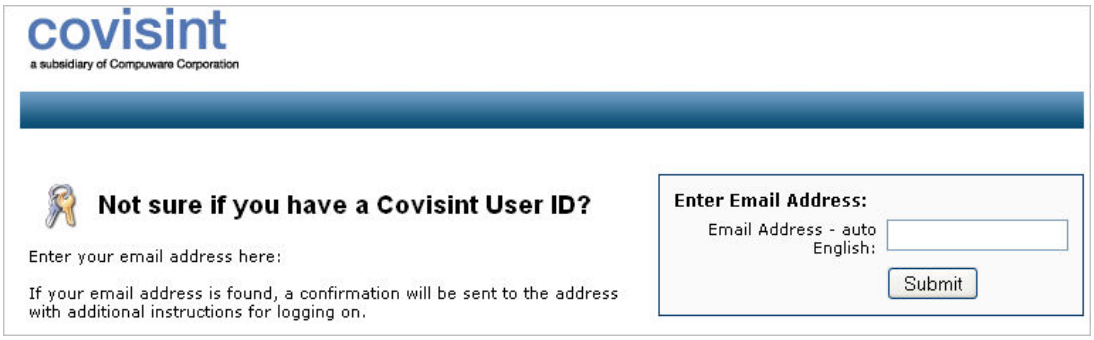
RESULT:

You have successfully reset your password.

Forgot My User Name

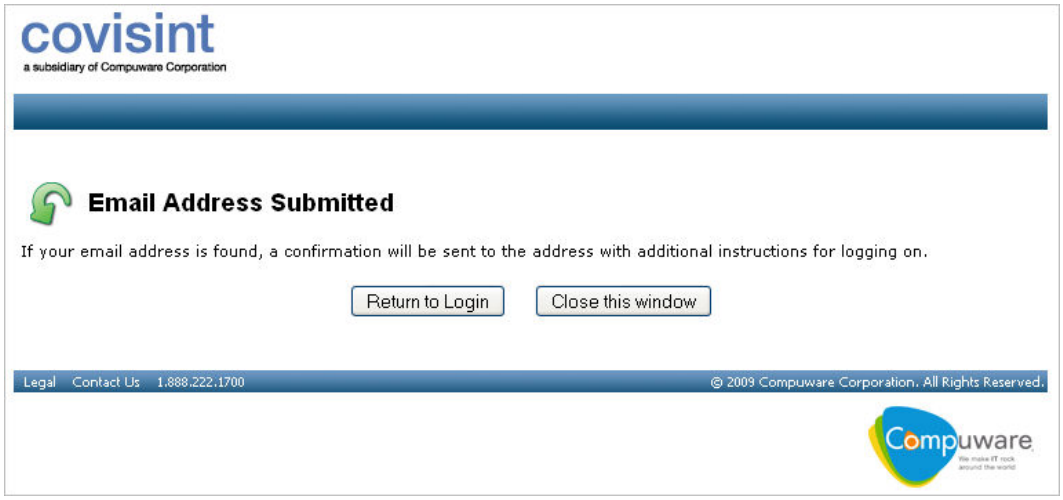
1. Navigate to the portal login screen. (http://covisint.com/loginAuto.shtml)

2. Click **Forgot your user name?**



3. Key in your email address into the open text field. You must enter the email addressed you identified when you registering for portal access.

4. Click **Submit.** The screen refreshes, and the **confirmation message is displayed**.



RESULT:

If your email address is found in the system, a confirmation will be sent to the address with additional instructions for logging on.

GENERAL USERS TASK LIST

Complete following list of tasks in the order listed the first time you log into Supplier Connection:

- Set your user preferences
- View Items in your Inbox
- Manage Items in your Sent folder
- Read / Process Alert Messages

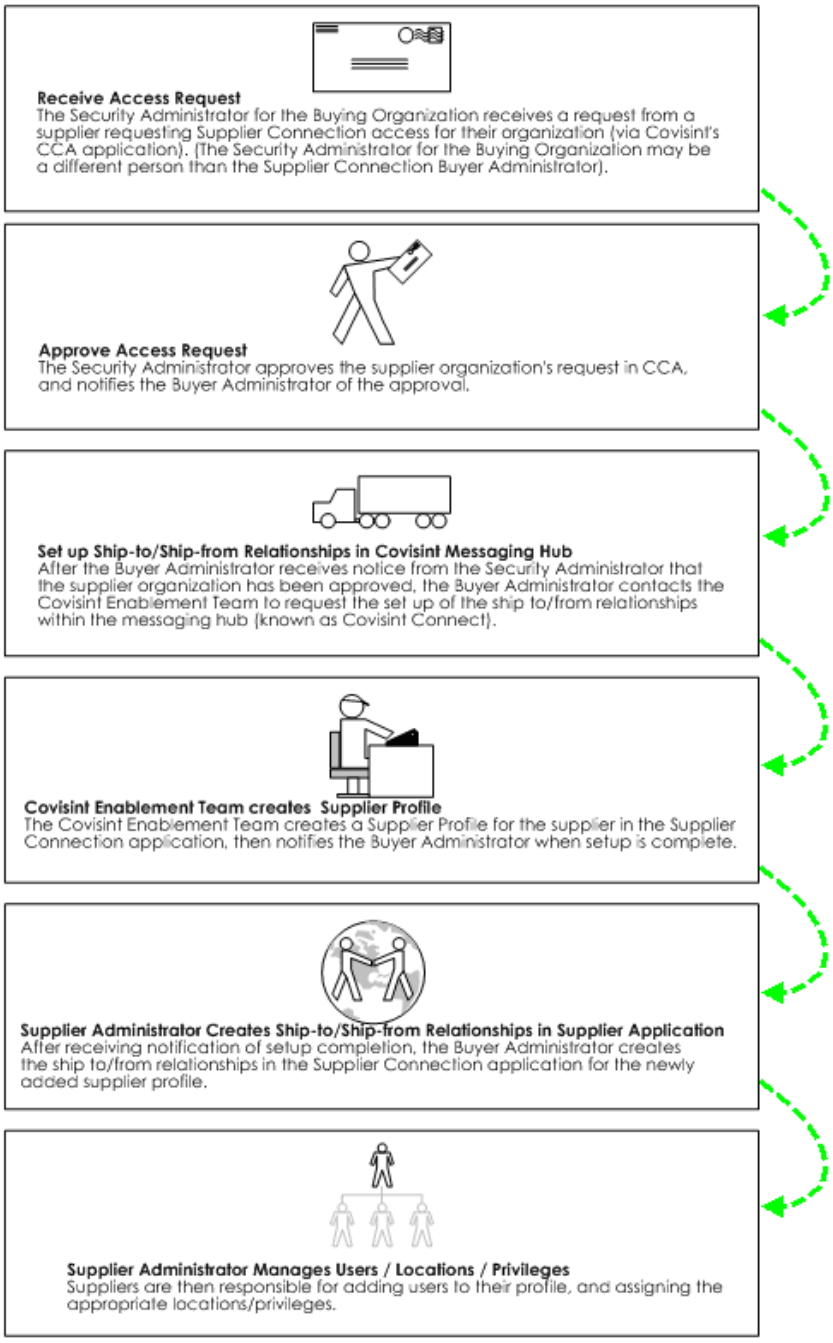
BUYER ADMINISTRATOR TASK LIST

Complete following list of tasks in the order listed the first time you log into Supplier Connection

- Complete General User Tasks
- Create Ship-To Locations
- Add Users to Supplier Connection
    - assign Administrator Role when necessary
    - assign users to ship-from / ship-to locations
        - assign user privileges per location
- Create New Trading Partner Relationships
- Managing Ship-To / Ship-From Relationship Records
- Create Bulletins

Supplier Connection Enablement Process for Buyer Administrators

The following provides a high-level overview of the supplier enablement process - onboarding new supplier organizations.



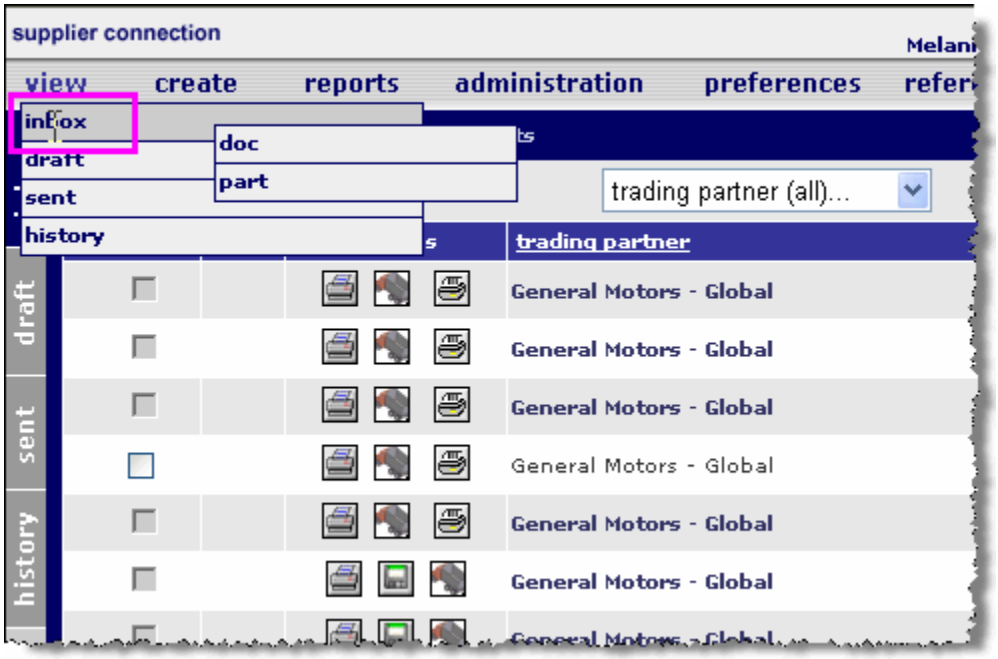
VIEWING ITEMS IN THE INBOX

Only current schedule requirements are displayed within the Inbox. As new documents are received, older, read documents are automatically moved to the history folder. Designated individuals receive an email notification that documents arrived in the Supplier Connection Inbox, according to the email address set in the user preferences.

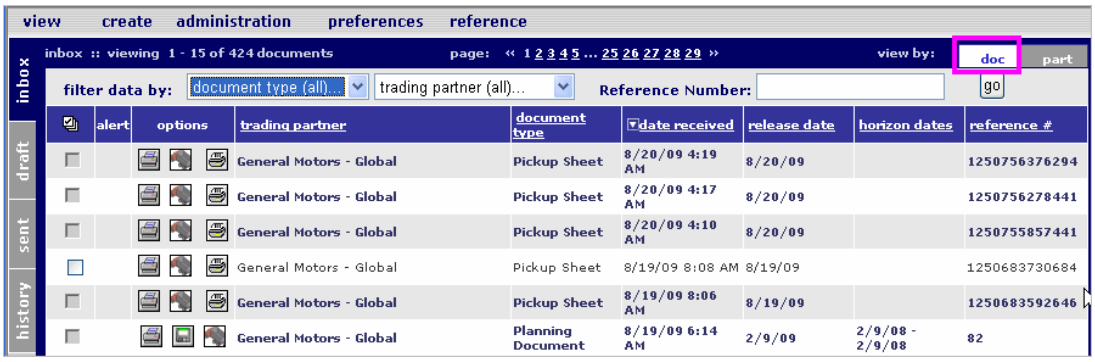
View the Inbox from either of two tabs; ***Doc*** and ***Part***.

1. View a document by clicking **Inbox** form the **View** menu. A list of your outbound documents are displayed. This is the information pulled from the flat file, presented in a readable PDF format.

   Where is the Inbox?



2. Click the **doc** tab.



Details About The Inbox Screen

- New documents appear in bold font. Once read, the font is no longer bold.
- The checkbox is only enabled after a document has been read.
- A red stop sign icon indicates a trading partner setup error - this is for your information only. You cannot resolve this error, and it will be handled between the buyer and the help desk.

3. Filter your view of the data by selecting a document type and / or a trading partner from the drop down menus.
4. Click **go**. Results are displayed.
5. View the schedule by clicking (the print icon) in the *options* column. The schedule is displayed in a new window in PDF format.

You must have the Adobe Reader installed on your computer in order to read the file.

http://get.adobe.com/reader/

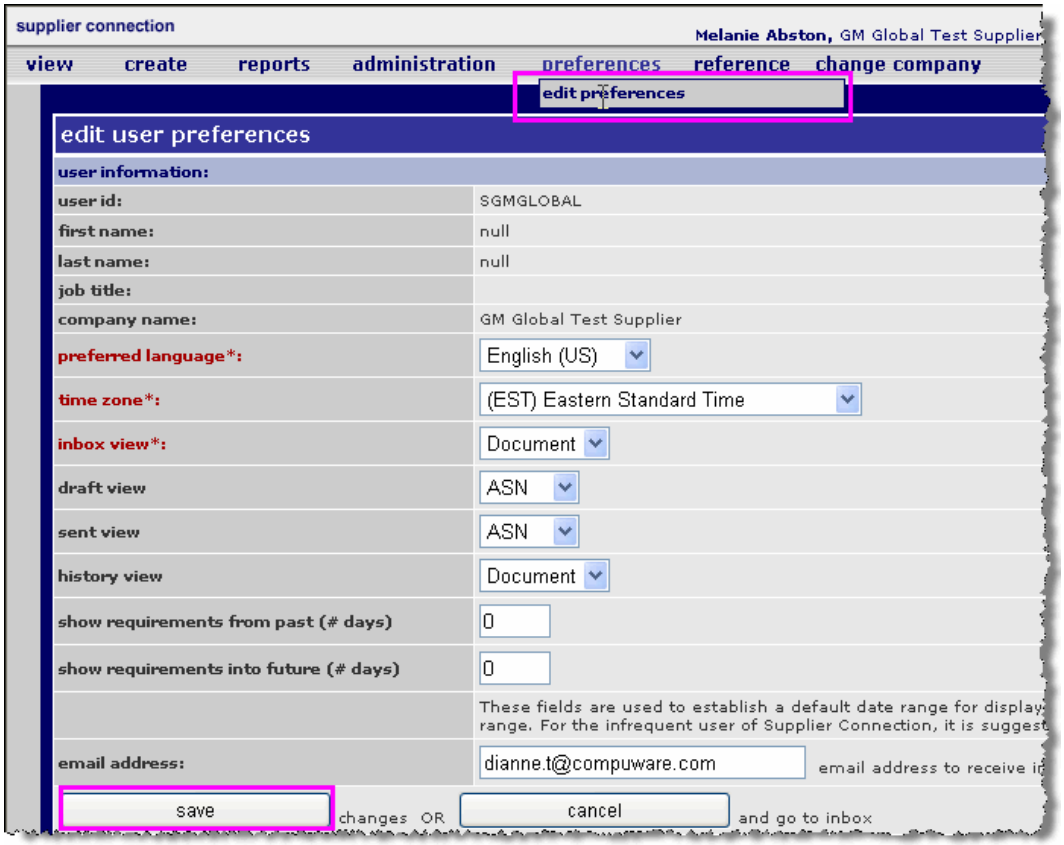
6. Optionally, in the PDF toolbar, click:
   - to print the schedule
   - to save the schedule to your computer.

RESULT:

You have successfully viewed items in the Inbox.

SETTING / EDITING YOUR USER PREFERENCES

1. From the Preferences menu, click **edit preferences.**



2. Key in all fields as required. Required fields are identified with red font and asterisk in the field name.

3. In the email address field, key in your email address. An email notification will be sent to this email address when a schedule is delivered to your Supplier Connection inbox, or for other alerts.

   GM Suppliers are required by GM to provide an email address. If you are a GM Supplier, you must complete the email address field even though it is not marked as required.

4. Click **Save**. The screen refreshes and your preferences are set.

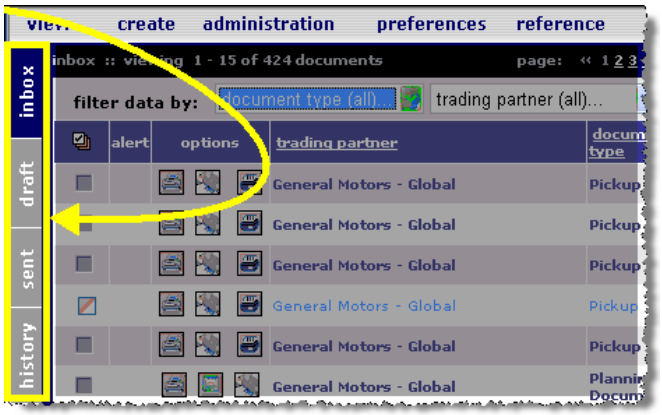
RESULT:

You have successfully set your user preferences.

MENU OPTIONS DEFINED

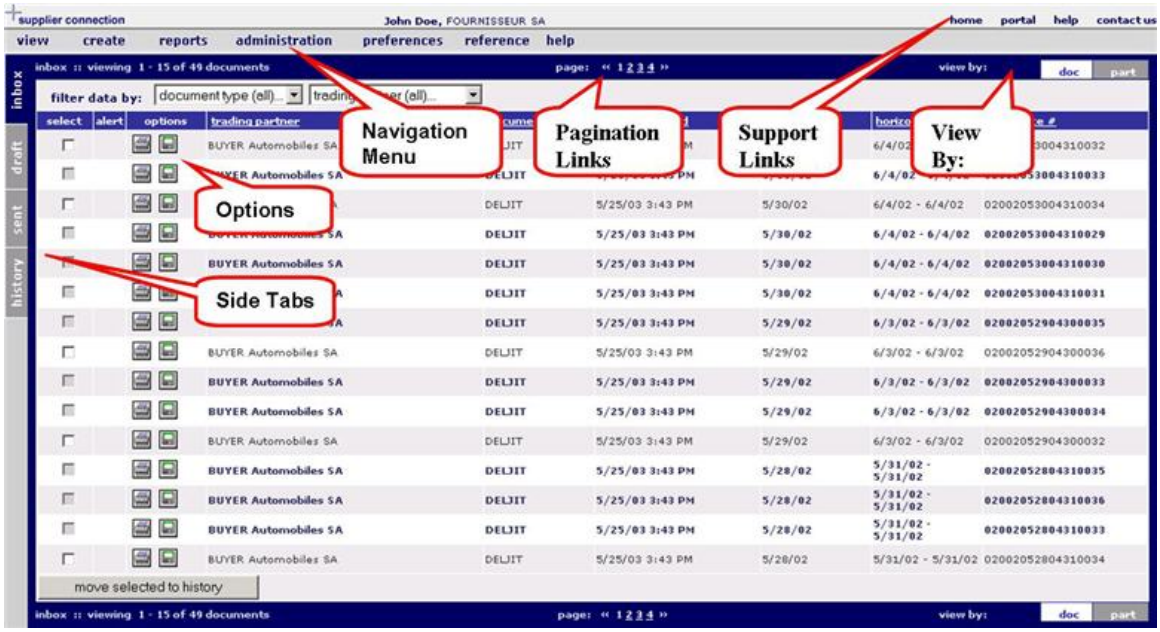
SECTION:	DESCRIPTION:
view	As users move throughout the various Supplier Connection pages they can quickly view new (inbox), draft, sent or archived (history) supply chain documents.
create	Ability to create Advanced Ship Notice (ASN) and Invoice. Note: For ASNs, this feature is only used when shipping products that are not listed on a material release.
reports	Generate standard reports.
administration	Ability to set up locations and manage trading partner relationships. (Administrator access only).
preferences	Set user-specific preferences, including language, time zone, default viewing options.
references	A reference database. Create and manage master data that is used during the printing of the delivery note, creating an ASN, creating an invoice, and validating an ASN and invoice. (Administrator access only).

Side Tabs Defined



INBOX:	View received documents such as ASNs sent from suppliers. [Learn more about the inbox view >>>]
DRAFT:	View and edit draft versions of documents prior to sending, such as advanced ship notices or invoices.
SENT:	View sent documents, such as advanced ship notices or invoices.
HISTORY:	View the documents or parts that have been moved to the history folder, such as material releases, forecasts, planning schedule or shipping schedule.

Main Screen Elements Defined



SECTION:	DESCRIPTION:
Options	Tasks that can be performed for the specific item.
Side Tabs	When displayed they always appear on the left side of the page. The navigation tabs are only present when the user is in one of the four tabs (inbox, draft, send or history), which are accessed via "view" from the navigation menu.
Navigation Menu	Displayed on all pages throughout the application, enables you to navigate to various sections of the application.
Pagination Links	Navigate through all pages via the page numbers.
Support Links	Displayed on all pages throughout the application, at the top right side of the page.
View By	- Part tab allows you to view incoming documents by part number. - Doc tab allows you to view all incoming documents.

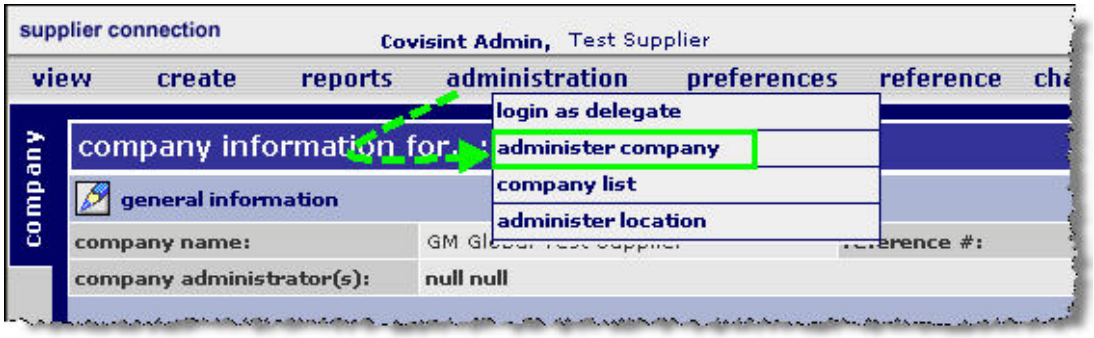
MANAGING SHIP-TO LOCATIONS

Process for Creating New Ship-To Locations

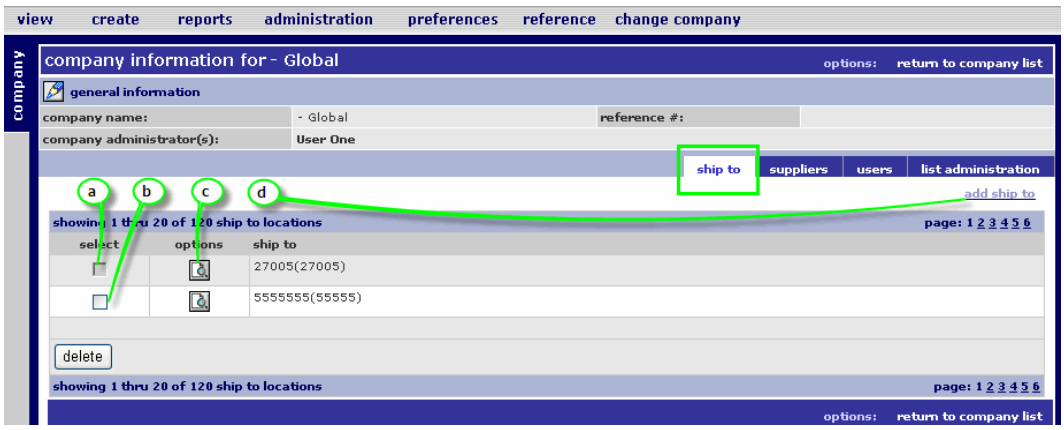
The following identifies the main tasks required in creating new ship-to locations for your company.

- Task 1: Create the ship-to location
- Task 2: Assign users
- Task 3: Assign privileges to users (Users may have different privileges in various locations, as privileges are assigned per location).

Viewing Ship-To Locations



1. From the administration menu, click **administer company**.
2. Click **ship to**. The ship to screen is displayed.



Details of the Ship To Screen

a disabled checkbox - You cannot check the box in order to delete ship-to locations after transactions have occurred.

b enable the checkbox to delete a ship to location from the system. Refer to the section entitled Deleting Ship-To Locations for details >>>

c Click to view location details and assign/remove users from the location. Refer to the section entitled Assigning Users to / Removing Users From Ship-To Locations for details >>>

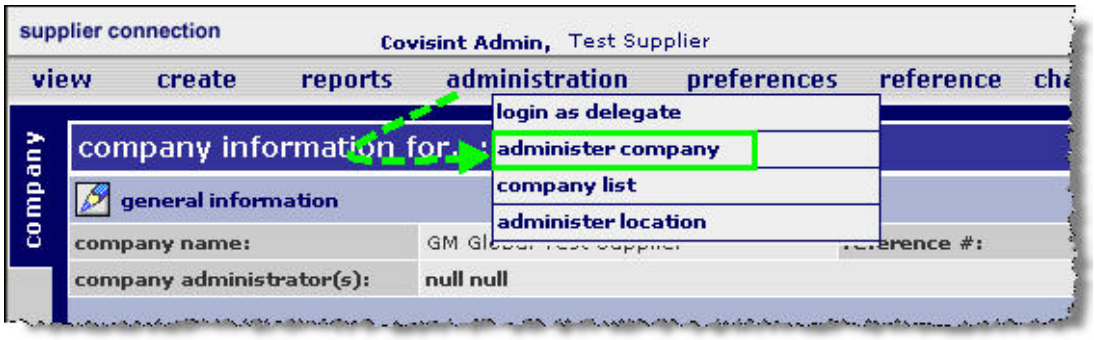
d click **add ship to** add a new ship to location in the system. Refer to the section entitled Creating New Ship-To Locations for details >>>

3. Click of the ship-to location for which you wish to manage users.

RESULT:

You have successfully viewed ship-to location details.

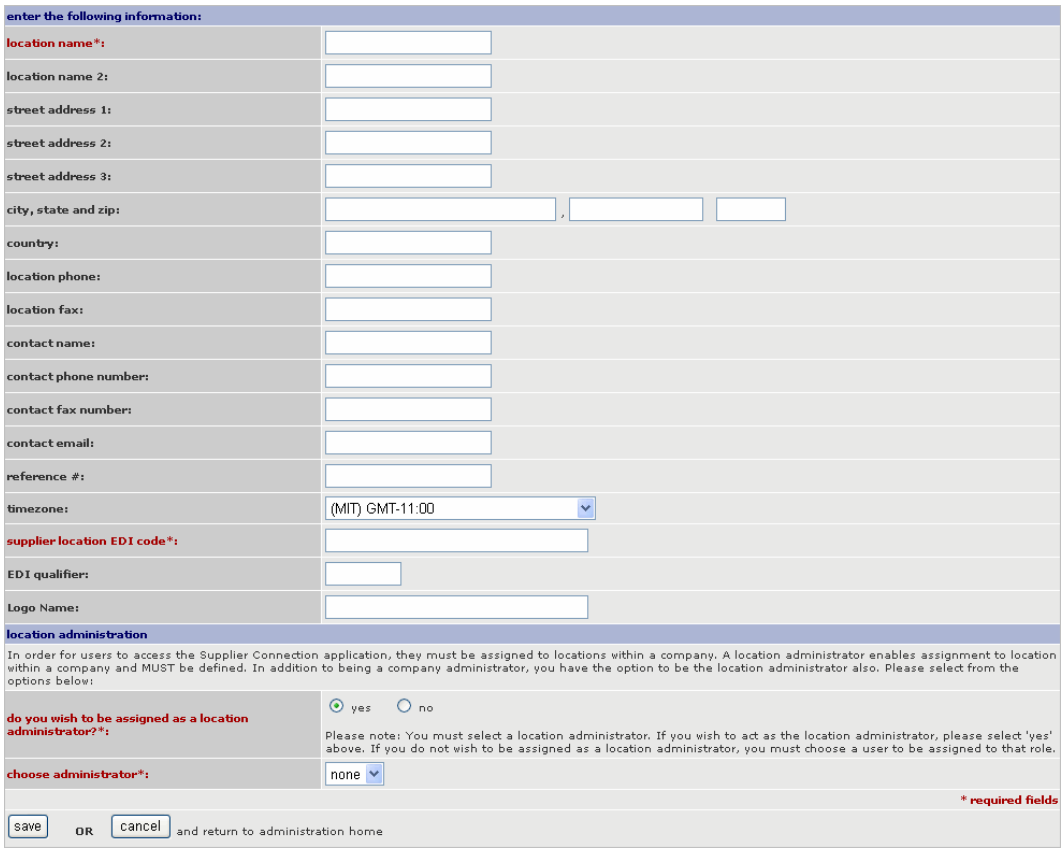
Creating New Ship-To Location



1. From the administration menu, click **administer company**.
2. Click **ship to**. The ship to screen is displayed.

3. Click **add ship to**. The **Add Location screen** is displayed.

Add Location Screen


enter the following information:

location name*:
location name 2:
street address 1:
street address 2:
street address 3:
city, state and zip: ,
country:
location phone:
location fax:
contact name:
contact phone number:
contact fax number:
contact email:
reference #:
timezone: (MIT) GMT-11:00
supplier location EDI code*:
EDI qualifier:
Logo Name:

location administration

In order for users to access the Supplier Connection application, they must be assigned to locations within a company. A location administrator enables assignment to location within a company and MUST be defined. In addition to being a company administrator, you have the option to be the location administrator also. Please select from the options below:

do you wish to be assigned as a location administrator?*: yes no

Please note: You must select a location administrator. If you wish to act as the location administrator, please select 'yes' above. If you do not wish to be assigned as a location administrator, you must choose a user to be assigned to that role.

choose administrator*: none

* required fields

save OR cancel and return to administration home

4. Key in required fields as follows:
   a. Location Name field (this name helps your suppliers recognize you).
   b. Key in the ship-to EDI code in the Supplier Location EDI Code field (ignore the word 'supplier' on this field).
   c. in the location administration section at the bottom of the screen, enable the appropriate radio button to identify yourself as the location administrator. If you select no, you must identify an administrator in the choose administrator drop down menu.
   d. In the Choose Administrator drop down menu, select 'none' if you are the administrator and selected 'yes' to step 4c. If you selected 'no' in step 4c, select the person you wish to use as location administrator from the drop down menu.
5. Key in optional fields as desired. For example, if you wish to allow your supplier to view additional information, such as address and contact information, enter it here. Address information is printed on the Delivery Note.

For most buyer companies, the "EDI Qualifier" field does not need to be updated, but can be updated for reference purposes.

The EDI Qualifier can be used with outbound documents to allow qualifiers to be varied by ship-to plant. For most buyer companies, the qualifiers are hard coded in the ASN map.

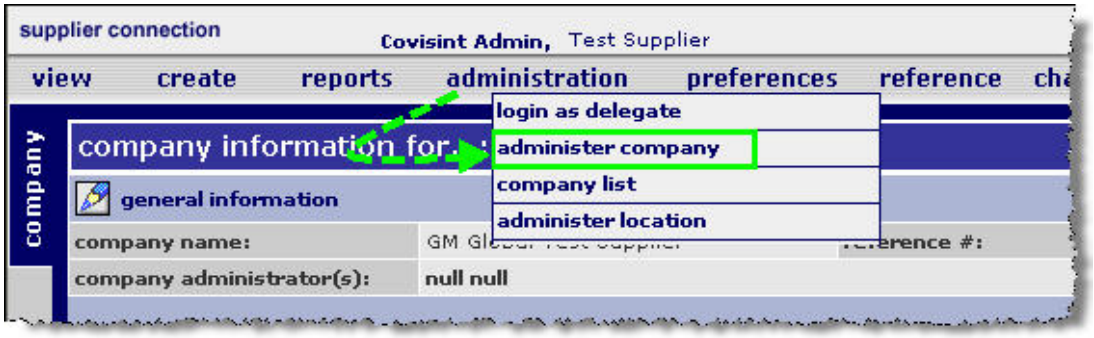
6. Optionally, if you wish to add a logo to your location, type in the URL where the logo is uploaded in the Logo Name field.

7. Scroll to the bottom of the screen and click **Save.** The new ship-to location is added to the system. Next, you may wish to assign your users to this location.

RESULT:

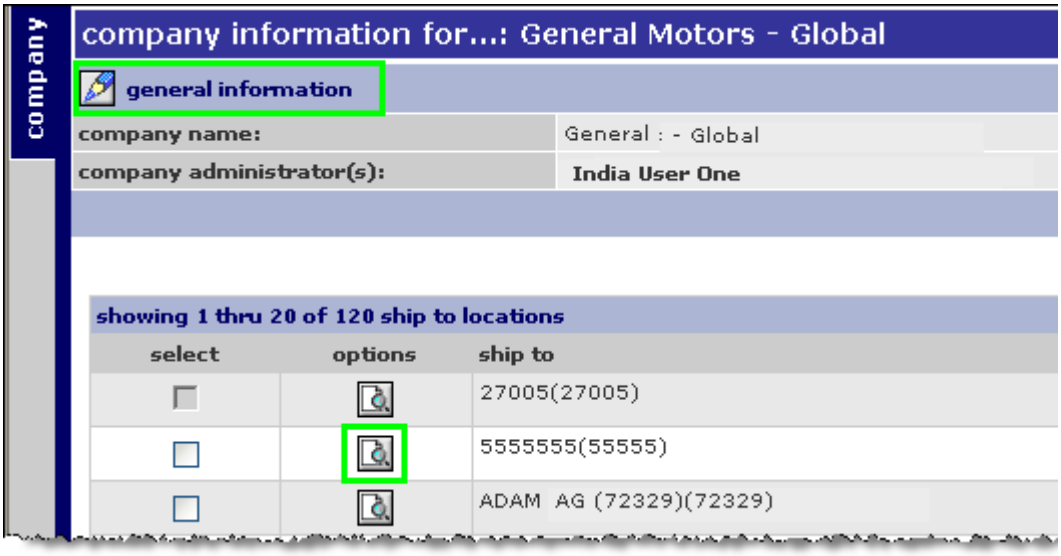
You have successfully created a new ship-to location. Next, you may wish to assign your users to this location.

Editing Ship-To Location



1. From the administration menu, click **administer company**.
2. Click **ship to**. The ship to screen is displayed.

Where is the Ship To tab?

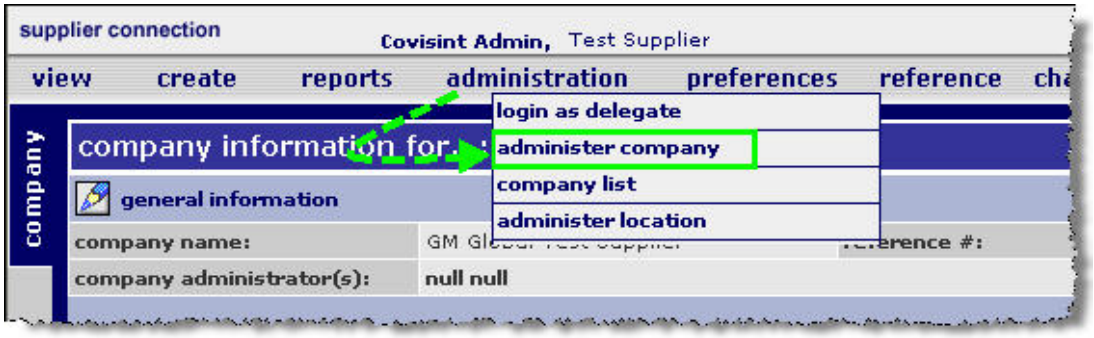


3. Click next to the location you wish to edit.
4. Click next to 'general information' located at the top left corner of the screen.
5. Modify fields as desired / required, ensuring all required fields remain populated, as follows:
    a. Location Name field (this name helps your suppliers recognize you).
    b. Key in the ship-to EDI code in the Supplier Location EDI Code field (ignore the word 'supplier' on this field).
7. Scroll to the bottom of the screen and click **Save**. The screen refreshes, and details regarding the ship-to location are updated.

RESULT:

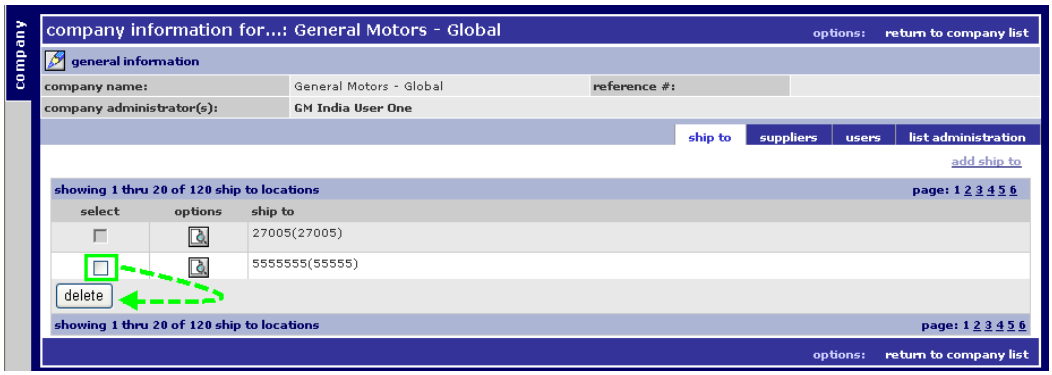
You have successfully edited a ship-to location.

Deleting Ship-To Locations



1. From the administration menu, click **administer company**.
2. Click **ship to**. The ship to screen is displayed.

Where is the Ship To tab?



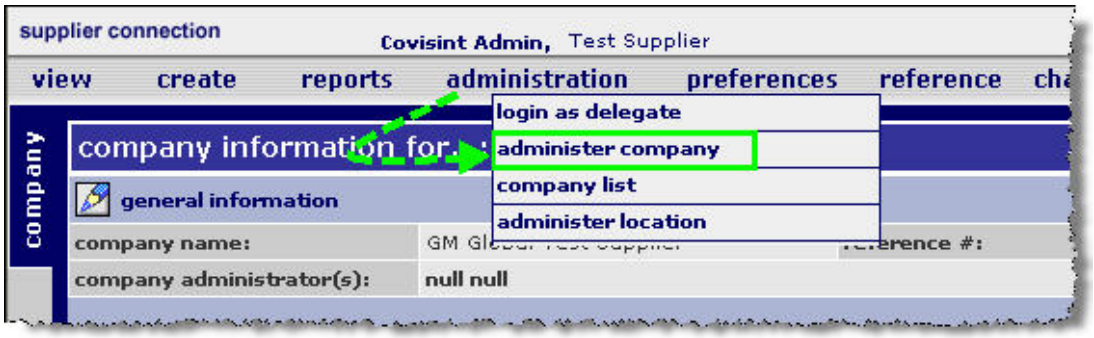
You are not able to delete ship to locations for which schedules have been received. This is indicated by being unable to click the checkbox in the select column of the ship-to location [as displayed in the image above for ship to 27005(270050)].

3. Enable the checkbox of each ship-to location you wish to delete from the system.
4. Click **delete**. A confirmation box is displayed.
5. Click **OK** to confirm. The screen refreshes, and the ship-to is removed from the system.

RESULT:

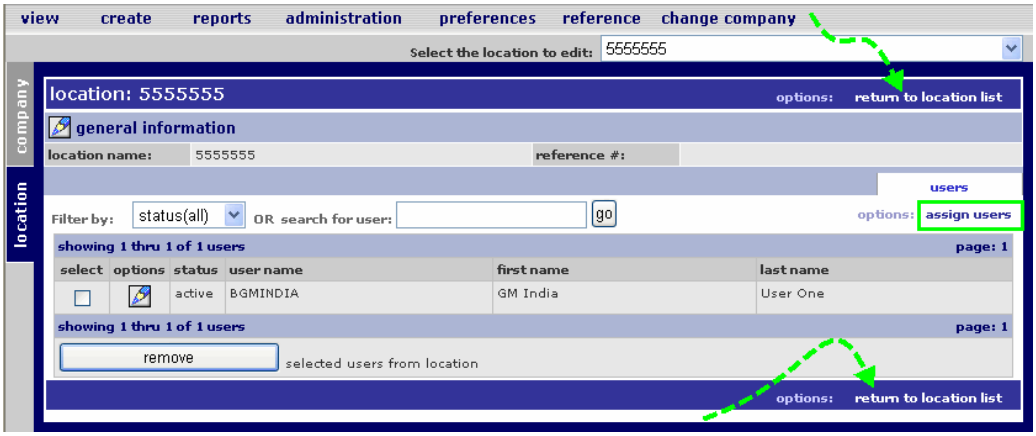
You have successfully deleted ship-to locations.

Assigning Users To Ship-To Locations



1. From the administration menu, click **administer company**.
2. Click **ship to**. The ship to screen is displayed.

3. Click  of the ship-to location for which you wish to view details. The Location Details screen is displayed.



4. Click **assign users.** The Assign Users to Location screen is displayed.

5. Key in the user id of the person you wish to assign to the location, then click **GO**.

User must meet the following criteria to be assigned to a location:
- registered for and been approved to access Supplier Connection
- added to Supplier Connection by the Administrator

6. Enable the checkbox next to the user you wish to add.
7. Click **assign**. The screen refreshes, and the user is available to be added to the location.
8. Click **cancel** to return to the location information screen.
9. Optionally, edit privileges for this user in this ship to location by completing the steps in the section entitled Assigning User Privileges per Ship To Location.

RESULT:

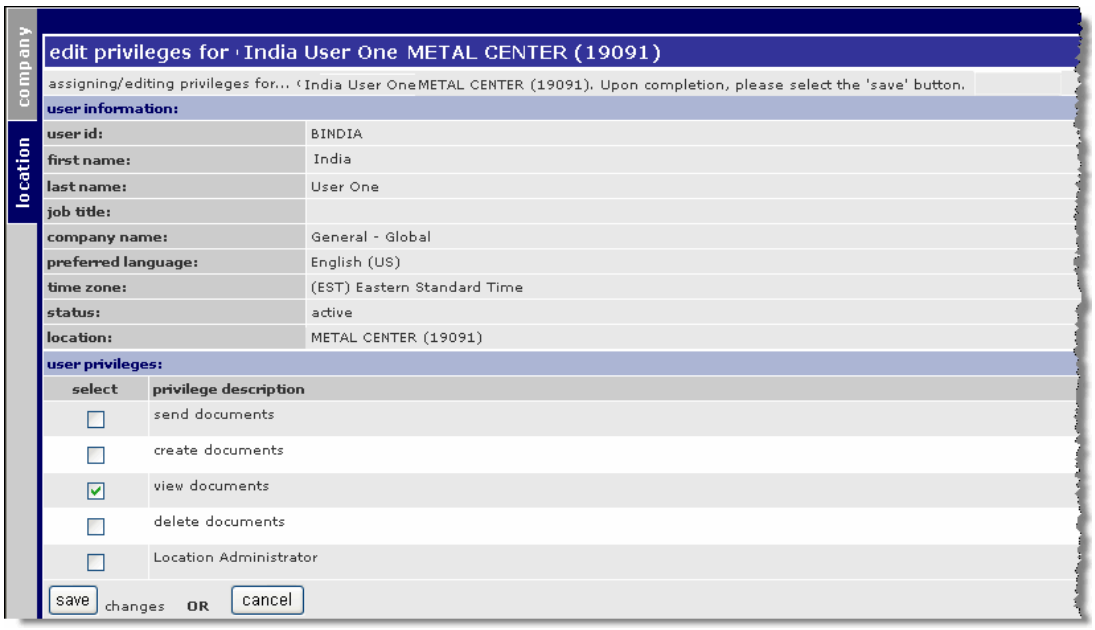
You have successfully assigned users to ship-to locations. You may wish to edit privileges for this user in this ship to location by completing the steps in the section entitled Assigning User Privileges per Ship To Location.

Assigning Users Privileges Per Ship-To Location

User must meet the following criteria before being assigned privileges per ship-to location:

- registered for and been approved to access Supplier Connection
- added to Supplier Connection by the Administrator
- assigned to the targeted ship-to location

1. Navigate to the View Details screen of the ship-to location for which you wish to assign user privileges. Refer to the section entitled Viewing Ship-To Locations for further details.
2. Click next to the user for whom you wish to assign privileges per location. A list of locations to which this user is assigned is displayed.
3. Click next to the location for which you wish to assign privileges. The edit privileges screen is displayed for this user in the selected location.

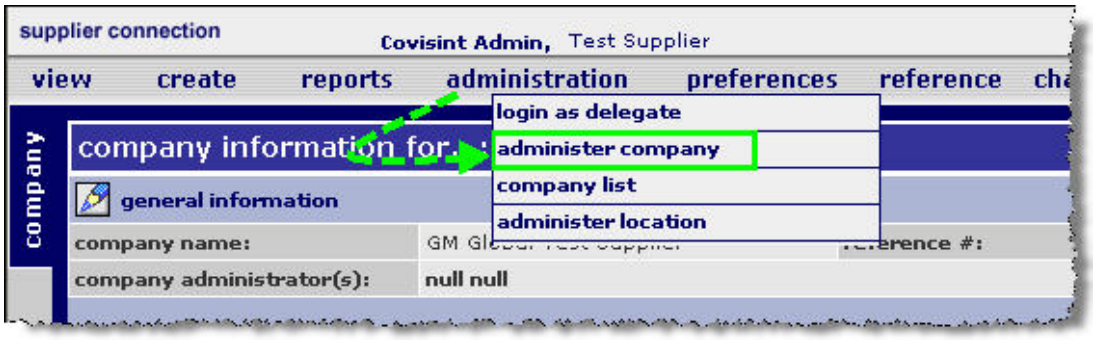


4. Enable the checkbox of each privilege you wish to assign to this user within this location.
5. Click **Save**. The screen refreshes, and the privileges are updated for the user.
6. Optionally, repeat steps 1 - 5 as necessary for additional ship to locations.

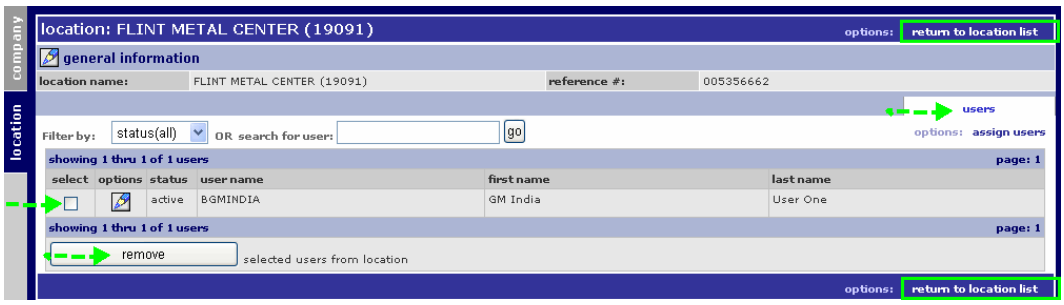
RESULT:

You have successfully assigned privileges for a user per ship-to location.

Removing Users From Ship-To Locations



1. From the administration menu, click **administer company**.
2. Click **ship to**. The ship to screen is displayed.
3. Click of the ship-to location for which you wish to view details. The Location Details screen is displayed.



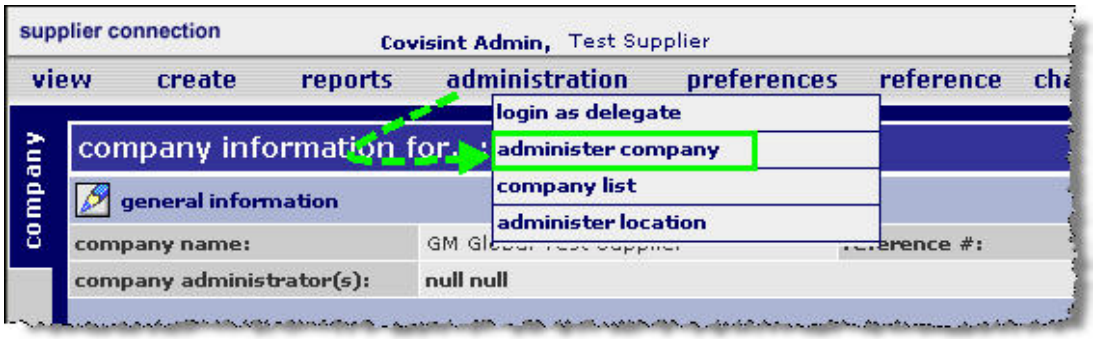
4. Click **users.** The users assigned to the Location screen is displayed.
5. Enable the checkbox of each user you wish to remove from the location. (Optionally, you may search for the user if the list is long)
6. Click **remove**. The screen refreshes, and the user is removed to the location.
7. Click **return to location list** when finished.

RESULT:

You have successfully removed users from ship-to locations.

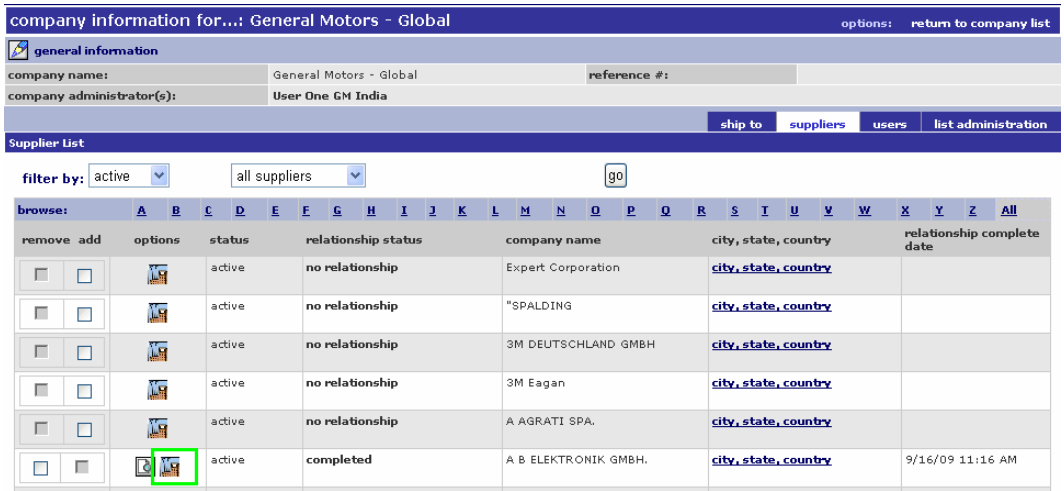
MANAGING SHIP-FROM LOCATIONS

Viewing Ship-From Locations Per Supplier



1. From the administration menu, click **administer company**.
2. Click **suppliers** tab. A list of your existing supplier trading partner relationships is displayed.
3. From the filter by drop down menu, select **my suppliers**, then click **go**.
4. **Click** . A list of all ship-from locations for the supplier is displayed.

   Where is there factory icon?



Icons Used on the Ship-From Screen

Add icon - used to add a Ship-From / Ship-To relationship record.

Copy icon - used to create a new ship-from / ship-to relationship with data from an existing relationship by copying the EDI setup from an established relationship record. After clicking on the copy icon, data fields will be pre-populated with the information from selected relationship record. Complete the relationship by selecting the target ship-to location and entering a dock code, if any.

Edit icon - used to edit ship-from location information

RESULT:

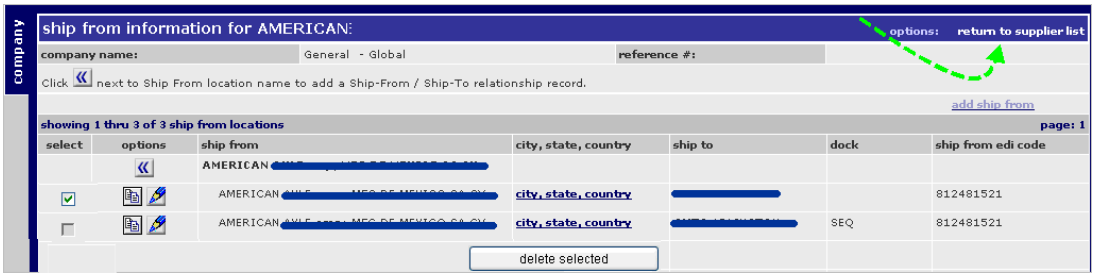
You have successfully viewed ship-from locations for a supplier.

Adding a Ship-From Location

Creating a new trading partner relationship is a multi-step process. Those are:

- Task 1: Create the relationship
- Task 2: Create the ship-from location
- Task 3: Create ship-to relationship record

1. Navigate to the view screen of the ship-from locations for the supplier. Refer to the section entitled Viewing Ship-From Locations Per Supplier.



2. Click **add ship from** in the upper right corner of the screen.
3. Key in required fields as follows: (Required fields are identified with red font and an asterisk)
   a. In the location name field, key in the name of the new ship-from location.
   b. In the city field, key in the name of the city of the new ship-from location.
   c. In the country field, key in the name of the country of the new ship-from location.
4. Key in additional fields as desired.
5. Scroll to the bottom of the screen and click **Save.** The screen refreshes, and the ship-from location is added to the supplier's list.
6. Perform one of the following:

IF YOU WISH TO...	RESULT:
create a relationship record for the new ship from location	Click « next to the ship-from location. Refer to the section entitled Task 3: Create Ship-To Relationship Record for further details.
return to the supplier list without creating a relationship record	Click **return to supplier list** in the upper right corner of the screen.

RESULT:

You have successfully added a ship-from location. Next, proceed to the section entitled Task 3: Create Ship-To Relationship Record

Deleting a Ship-From Location

1. Navigate to the view screen of the ship-from location for the supplier. Refer to the section entitled [Viewing Ship-From Locations Per Supplier](#) for details.

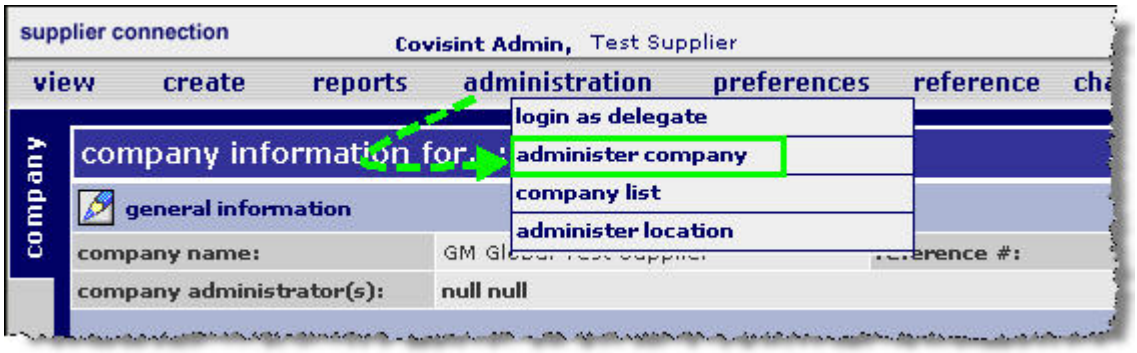
You are not able to delete ship from locations for which document activity has occurred. This is indicated by being unable to click the checkbox in the select column of a ship-from location, as displayed in the image above for the second ship-from location listed.

2. Enable the *select* checkbox of each Ship From location you wish to delete.
3. Scroll to the bottom of the screen and click **delete selected.** The screen refreshes, and the ship-from location is deleted.
4. Click **return to supplier list**.

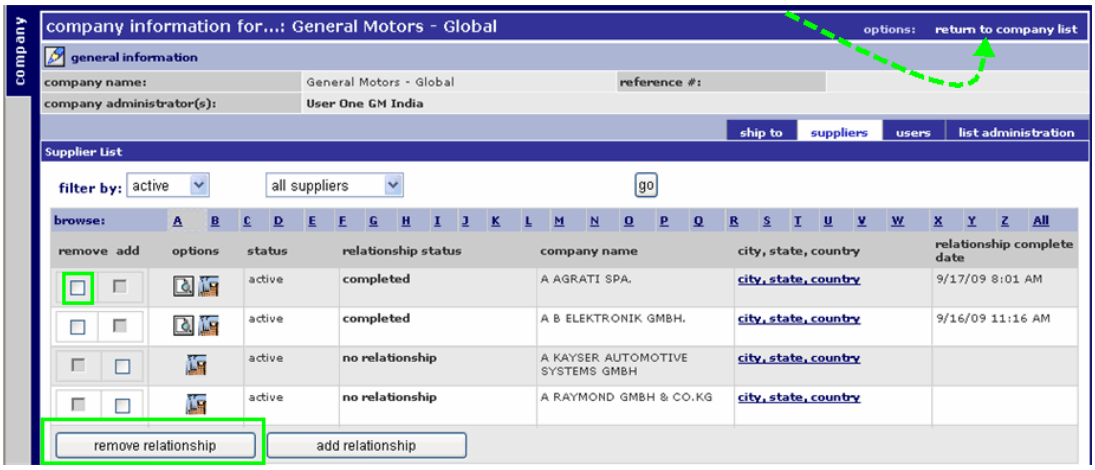
RESULT:

You have successfully deleted a ship-from location.

Removing Relationship Records of a Ship-From Location



1. From the administration menu, click **administer company**.
2. Click **suppliers** tab. A list of your existing supplier trading partner relationships is displayed.
3. Locate the supplier of the relationship record you wish to remove by selecting from the filter by supplier drop down menu, then click **go**.



You are not able to remove relationships for which document activity has occurred. This is indicated by being unable to click the checkbox in the remove column of a relationship record (as displayed in the image above for company name = A RAYMOND GMBH & CO. KG).

4. Enable the *remove* checkbox of each relationship record you wish to remove.
5. Scroll to the bottom of the screen and click **remove relationship.** The screen refreshes, and the relationship record is removed.

6. Click **return to company list.**

RESULT:

You have successfully removed a relationship record.

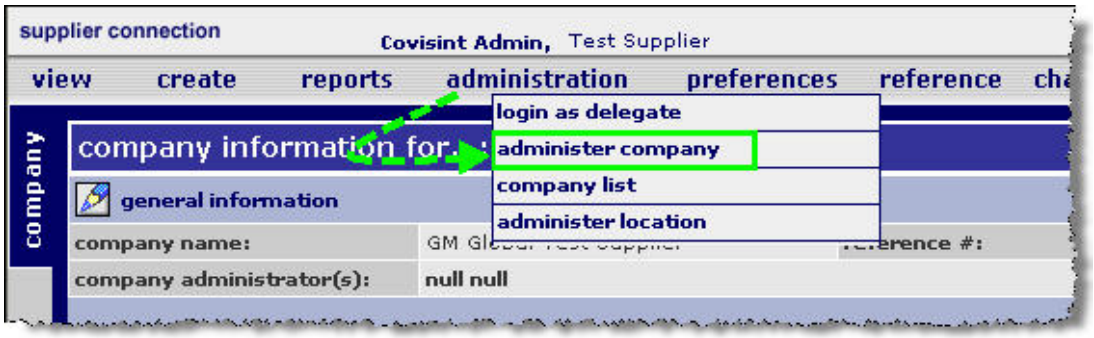
CREATING NEW TRADING PARTNER RELATIONSHIPS

Creating a Relationship

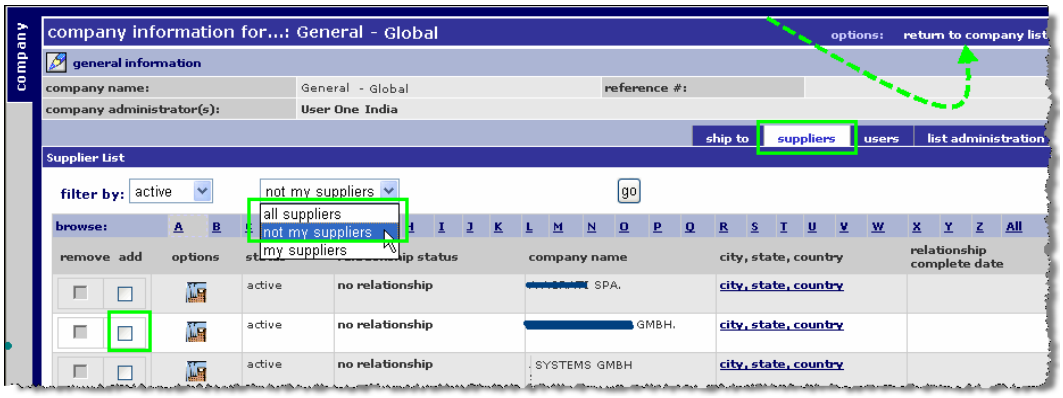
You must create a ship-to location in the system before completing the steps below to create the trading partner relationship.

Creating a new trading partner relationship is a multi-step process. Those are:

- Task 1: Create the relationship
- Task 2: Create the ship-from location
- Task 3: Create ship-to relationship record



1. From the administration menu, click **administer company**.



2. **Icons Used on the Supplier List Screen**

   Factory icon

   - Suppliers with a status of 'no relationship' - Hover your mouse over the icon to view ship from location records stored within Supplier Connection.
   - Suppliers with a relationship status of 'completed' - Hover your mouse over the icon to view ship-from plants and conduct EDI parameter setup at the plant level.

   Magnifying glass icon

   - Only displayed to suppliers with a relationship status of 'completed'
   - Hover your mouse over the icon to view company information and, for some buyer companies, to conduct EDI parameter setup at the company level (company level setup is not recommended).

1. Click **suppliers** tab. A list of your existing supplier trading partner relationships is displayed.
2. From the filter by drop down menu, select **all suppliers** or **not my suppliers**, then click **go**. A list of current suppliers registered in Supplier Connection is displayed.
3. Enable the checkbox in the ADD column next to the supplier with whom you wish to establish a trading partner relationship.
4. Scroll to the bottom of the screen and click **add relationship. T**he Add Relationship confirmation screen is displayed**.**
5. Click **confirm**. If prompted, click **OK** to confirm again. The screen refreshes, and the supplier list displays both the company and factory icons and the relationship status is displayed as 'complete'.
6. Click . A list of ship-from locations is displayed. (If you have never added ship-from locations, none will be displayed. You will need to complete the steps described in the topic entitled Adding a Ship-From Location).
7. Proceed to Task 2: Creating a Ship From Relationship Record.

RESULT:

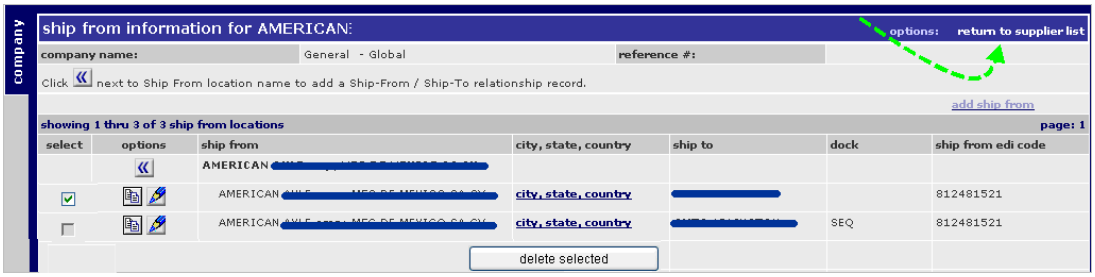
You have successfully created a new trading partner relationship. Next, create a ship-from / ship-to relationship record for the location. Refer to the section entitled Task 2: Creating Ship From Location.

Adding a Ship-From Location

Creating a new trading partner relationship is a multi-step process. Those are:

- Task 1: Create the relationship
- Task 2: Create the ship-from location
- Task 3: Create ship-to relationship record

1. Navigate to the view screen of the ship-from locations for the supplier. Refer to the section entitled Viewing Ship-From Locations Per Supplier.



2. Click **add ship from** in the upper right corner of the screen.
3. Key in required fields as follows: (Required fields are identified with red font and an asterisk)
   a. In the location name field, key in the name of the new ship-from location.
   b. In the city field, key in the name of the city of the new ship-from location.
   c. In the country field, key in the name of the country of the new ship-from location.
4. Key in additional fields as desired.
5. Scroll to the bottom of the screen and click **Save.** The screen refreshes, and the ship-from location is added to the supplier's list.
6. Perform one of the following:

IF YOU WISH TO...	RESULT:
create a relationship record for the new ship from location	Click « next to the ship-from location. Refer to the section entitled Task 3: Create Ship-To Relationship Record for further details.
return to the supplier list without creating a relationship record	Click **return to supplier list** in the upper right corner of the screen.

RESULT:

You have successfully added a ship-from location. Next, proceed to the section entitled Task 3: Create Ship-To Relationship Record

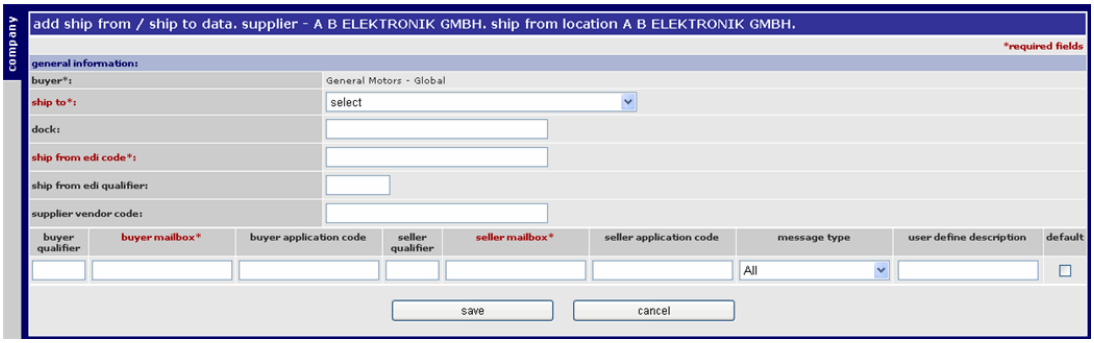
Create Ship-To Relationship Record

You must create a ship-to location and create a ship-from location in the system before completing the steps below to create the trading partner relationship record.

Creating a new trading partner relationship is a multi-step process. Those are:

- Task 1: Create the relationship
- Task 2: Create the ship-from location
- Task 3: Create ship-to relationship record

1. Navigate to the View Ship-From Location Per Suppliers screen.
2. Click « next to the ship-from location ***template record*** for which you wish to create a ship-to relationship record. The Add Ship-From / Ship - To Data screen is displayed.



3. Key in all required fields. Required fields are identified by bold red font and an asterisk next to the field name.
   a. Select the *ship to* location from the ship to drop down menu.
   b. Key in the *ship from edi code* in the open text field.
4. Key in optional fields as desired.
5. Key in the following fields for the new ship-from / ship-to relationship:
   a. Buyer Qualifier - key in the buyer qualifier code, e.g. ZZ, 01
   b. Buyer Mailbox - key in the buyer mailbox code
   c. Seller Qualifier - key in the seller qualifier code, e.g. ZZ, 01
   d. Seller Mailbox - key in the seller mailbox code
   e. Message Type - select **all** in the message type drop down menu
   f. User Defined Desc. - (optional)
   g. Default - enable the check box
6. Scroll to the bottom of the screen and click **save**.

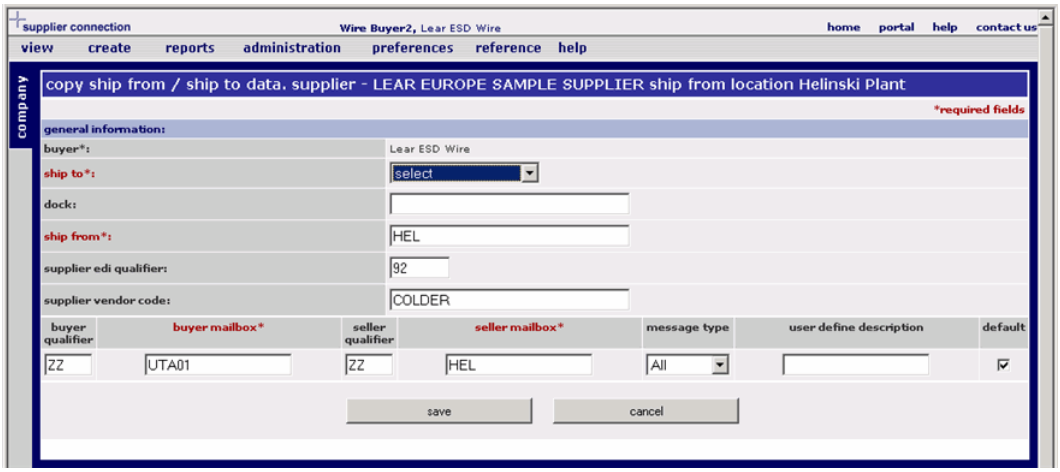
RESULT:

You have successfully created a ship-to relationship record.

Copy a Ship-To Relationship Record to Create a New Relationship Record

Copy the EDI setup from an established ship-to relationship record to create a new relationship record. This allows the EDI setup data from the selected record to pre-populate a new record.

1. Navigate to the View Ship-From Location Per Suppliers screen.
2. Click next to the ship-from location ***relationship record*** to which you wish to relate to a ship-to location. The copy data screen is displayed, and is pre-populated with information from selected relationship record.



3. Select the *ship to* location from the drop down menu.
4. Modify additional fields as necessary.
5. Click **save**.

RESULT:

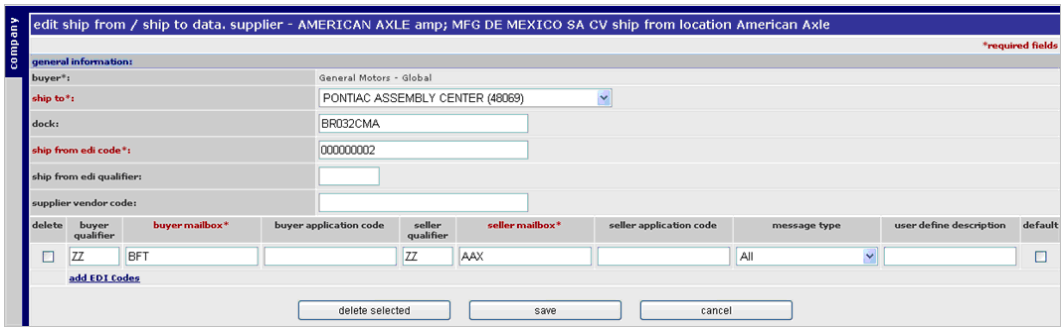
You have successfully copied a ship-to relationship record to a new relationship record.

MANAGING SHIP-FROM / SHIP-TO RELATIONSHIP RECORDS

Complete the following steps when you need to edit ***relationship records*** such as:

- editing ship-to location
- editing ship from edi code
- editing other general information
- editing buyer qualifier
- editing buyer and / or seller mailbox
- changing the default setting
- adding additional edi codes
- deleting existing edi codes

1. Navigate to the view screen of the ship-from location for the supplier. Refer to the section entitled Viewing Ship-From Locations Per Supplier for details.
2. Click . The Edit Ship-From / Ship -To Data Screen for the supplier is displayed.



3. Perform one or more of the following:

IF YOU WISH TO...	THEN:
change the ship-to for a relationship	select the new ship to in the ship to drop down menu.
edit the ship from edi code	key in the new ship from edi code in the ship from edi code open text box.
edit other general information	modify optional information as desired.
edit buyer qualifier	modify the buyer qualifier code as desired.
edit buyer and / or seller mailbox	modify the mailbox code(s) as desired.
change the default setting	enable or disable the default checkbox accordingly.
add additional edi codes	a. click add EDI codes link. b. key in all fields as required / desired.
delete existing edi codes	a. enable the checkbox next to the edi code you wish to remove. b. click **delete selected**.

4. Click **Save**.

RESULT:

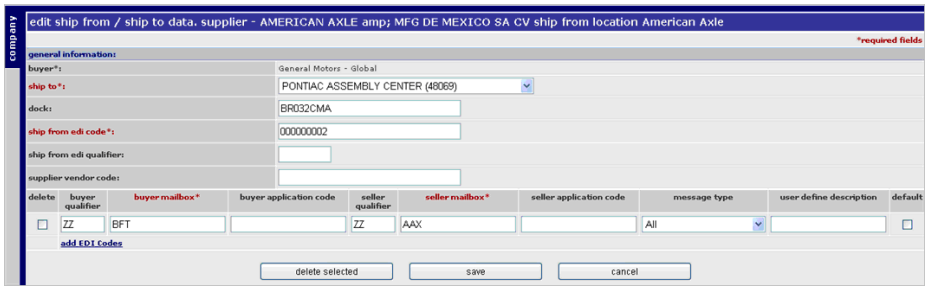
You have successfully managed ship-to / ship-from relationship records.

Managing Ship-To / Ship-From Relationship Records

Complete the following steps when you need to edit ***relationship records*** such as:

- editing ship-to location
- editing ship from edi code
- editing other general information
- editing buyer qualifier
- editing buyer and / or seller mailbox
- changing the default setting
- adding additional edi codes
- deleting existing edi codes

1. Navigate to the view screen of the ship-from location for the supplier. Refer to the section entitled Viewing Ship-From Locations Per Supplier for details.
2. Click . The Edit Ship-From / Ship -To Data Screen for the supplier is displayed.



3. Perform one or more of the following:

IF YOU WISH TO...	THEN:
change the ship-to for a relationship	select the new ship to in the ship to drop down menu.
edit the ship from edi code	key in the new ship from edi code in the ship from edi code open text box.
edit other general information	modify optional information as desired.
edit buyer qualifier	modify the buyer qualifier code as desired.
edit buyer and / or seller mailbox	modify the mailbox code(s) as desired.
change the default setting	enable or disable the default checkbox accordingly.
add additional edi codes	a. click add EDI codes link. b. key in all fields as required / desired.
delete existing edi codes	a. enable the checkbox next to the edi code you wish to remove. b. click **delete selected**.

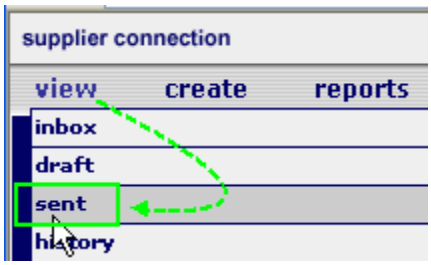
4. Click **Save**.

RESULT:

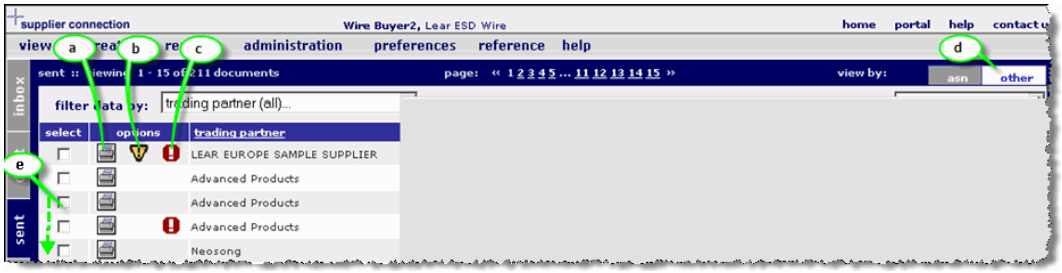
You have successfully managed ship-to / ship-from relationship records.

MANAGING SENT DOCUMENTS

Viewing Sent Documents



1. From the view menu, click **sent**. The Sent folder is displayed
2. Validate that "other" tab is selected (see d in screen shot below). A list of Material Releases that have been sent is displayed.



Details about the Sent Folder

a  **Printer icon** - print the material release in PDF format.

b  **Warning icon** - indicates that the release has not been read by the supplier. The icon will disappear after the supplier reads the release.

c  **Alert icon** - indicates a problem with transmission of the document. Click the alert icon to open the alert message and edit the errors in the supplier's ship-from location list. Refer to the section entitled Editing Material Release Errors for further details.

d **other other tab** - used to view material releases.

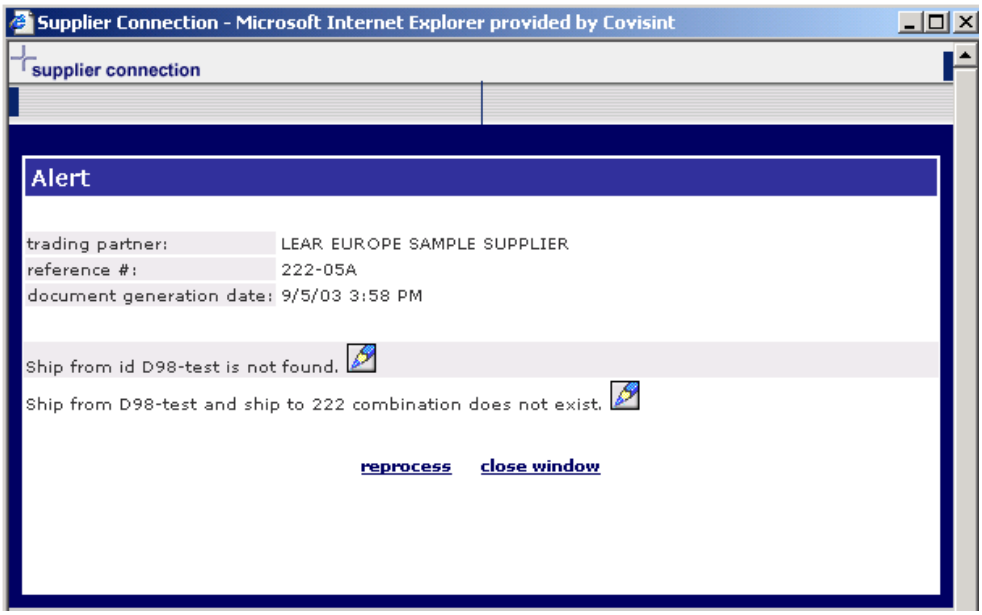
e **select** select checkbox - used to select the items you wish to delete from the sent box by enabling the checkbox then scrolling to the bottom of the screen to click delete.

RESULT:

You have successfully viewed sent material releases.

Reading / Processing Alert Messages

1. Navigate to the Sent folder. Refer to the section entitled Viewing Sent Documents for details.
2. Click (alert icon) next to the sent item. The Alert Message is displayed.



About the Alert Message

Alert messages describe where in the process an error occurred. In the above example, there are two items that need to be corrected so that the file can be reprocessed. Those are:

- the ship-from edi code field
- the ship-from / ship-to relationship record

There are three possible alerts types that could display on this screen. Those are the:

- ship-to id not found (For help fixing this type of error, refer to the topic Editing Ship to Location for details).
- ship-from edi code field (For help fixing this type of error, refer to the topic Viewing Ship-From Location Per Supplier for details).
- ship-from / ship-to relationship record (For help fixing this type of error, refer to the topic Managing Ship-From / Ship-To Relationship Records for details).

Pencil icon - click the pencil icon next to the error. The screen refreshes, and the field with the error is displayed for editing. Repeat the process for each error.

Reprocess link - click the reprocess link after correcting the errors in order to resend the transactions through the system to the supplier(s).

3. Click  next to an alert message.
4. Edit the fields as required, then click **Save**.
5. Click **reprocess**. The screen refreshes, and the transaction is reprocessed.

RESULT:

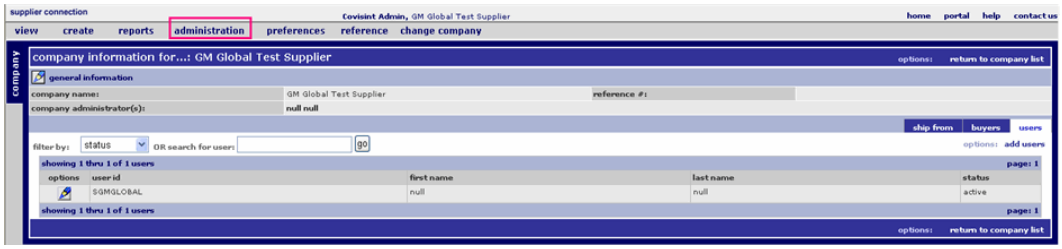
You have successfully read / processed alert messages.

USER ADMINISTRATION

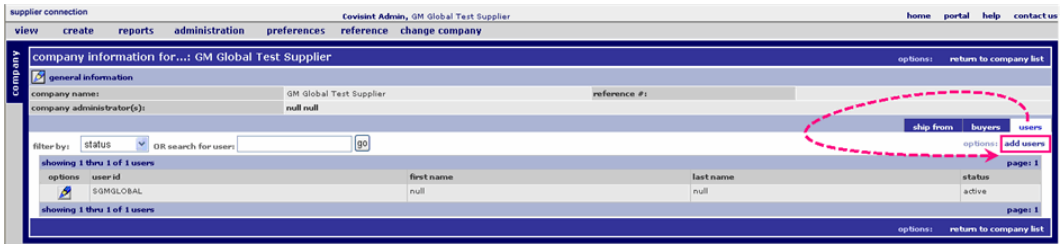
Adding New Users to Supplier Connection

You must be a Supplier Connection Administrator to perform this task, and the user must have already requested and been approved for the Supplier Connection application.

1. Log in to Supplier Connection.



2. Click **administration.**
3. Click **administer company** from the administration drop down menu. The Company Information screen is displayed.



4. Click **users** tab.
5. Click **add users**. The **add new users screen** is displayed.

Add New User Screen

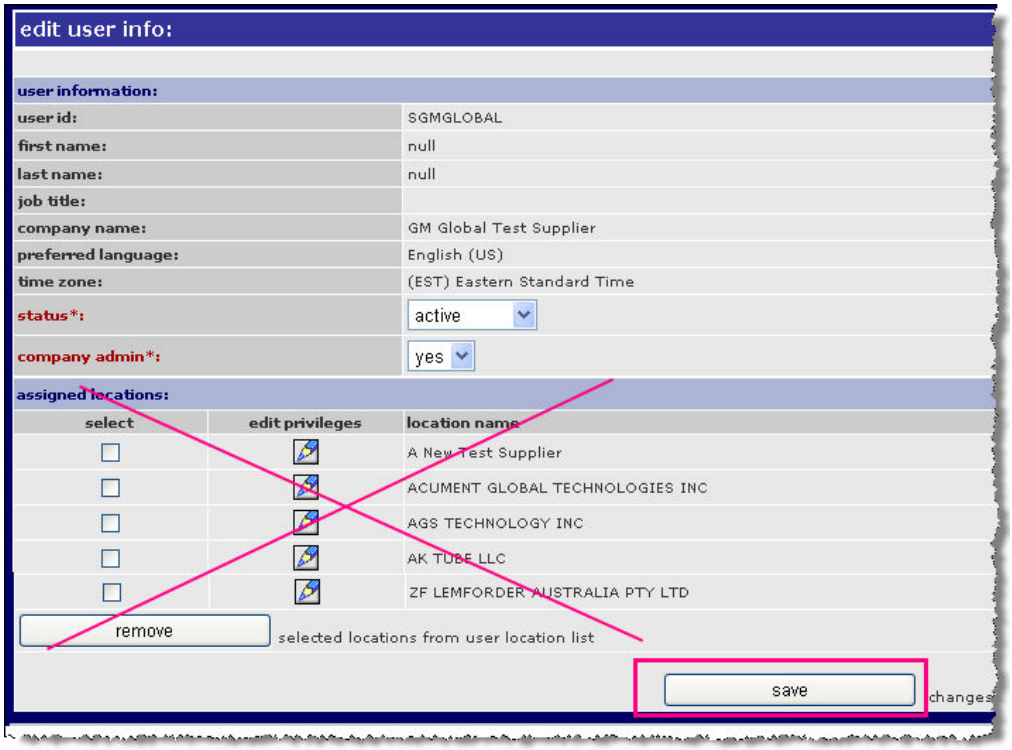
You can only add users into Supplier Connection that meet the following criteria:

- first, user's access has been granted to the Covisint Portal.
- second, user's access has been granted to the Supplier Connection service package within the portal.

Register for a User ID at: http://us.register.covisint.com/start.html The self registration request for a new User ID will be routed to your internal Security Administrator for approval.

6. Key in one portal user id in each open text field.
7. Click **add users.** The screen refreshes, and each user is added to the list.
8. Click in the options column next to the user id you added. The edit user info screen is displayed.
9. Select **active** in the status drop down menu.
10. Select **yes** from the company admin drop down menu if you wish to assign the Administrator role to the user.

Ignore all other options on this screen.

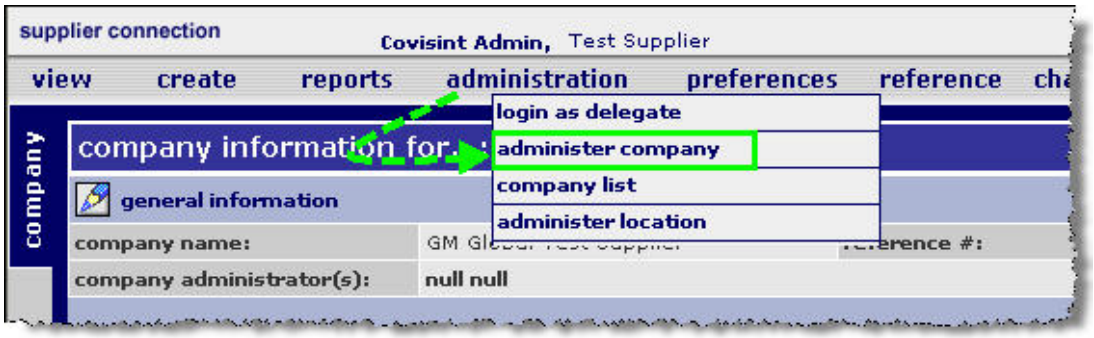


11. Scroll to the bottom of the screen and click **Save**.
12. Optionally, assign the Company Administrator role to the user.
13. Optionally, assign a user to a ship-to location.

RESULT:

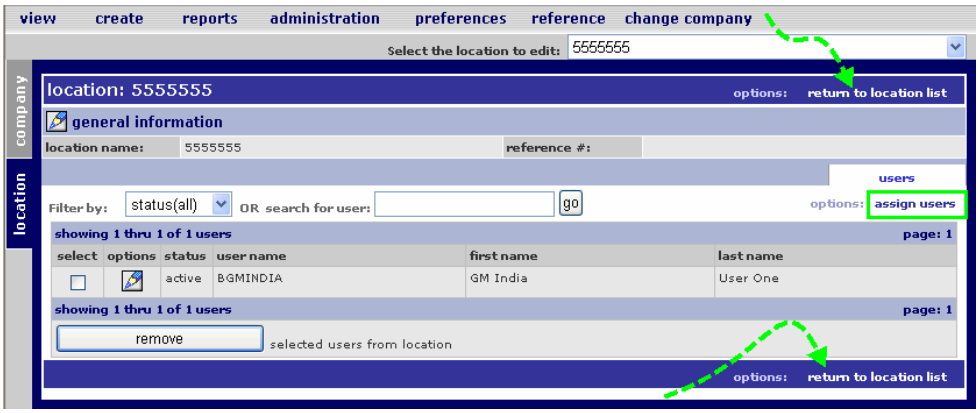
You have successfully added new users to Supplier Connection.

Assigning Users To Ship-To Locations



1. From the administration menu, click **administer company**.
2. Click **ship to**. The ship to screen is displayed.

3. Click  of the ship-to location for which you wish to view details. The Location Details screen is displayed.



4. Click **assign users.** The Assign Users to Location screen is displayed.

5. Key in the user id of the person you wish to assign to the location, then click **GO**.

User must meet the following criteria to be assigned to a location:
- registered for and been approved to access Supplier Connection
- added to Supplier Connection by the Administrator

6. Enable the checkbox next to the user you wish to add.
7. Click **assign**. The screen refreshes, and the user is available to be added to the location.
8. Click **cancel** to return to the location information screen.
9. Optionally, edit privileges for this user in this ship to location by completing the steps in the section entitled Assigning User Privileges per Ship To Location.

RESULT:

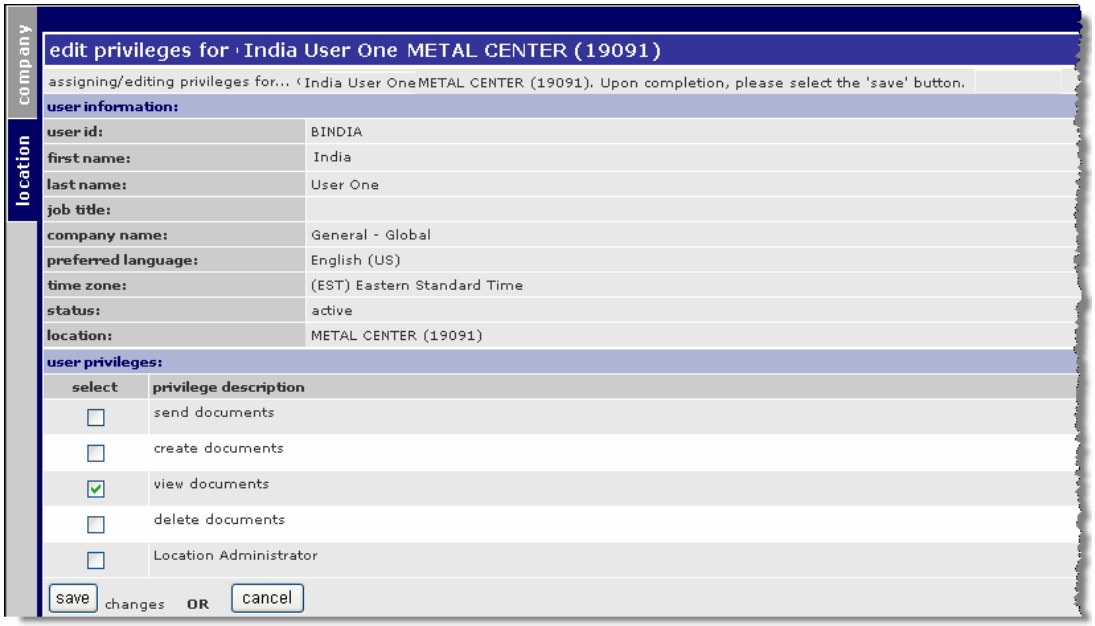
You have successfully assigned users to ship-to locations. You may wish to edit privileges for this user in this ship to location by completing the steps in the section entitled Assigning User Privileges per Ship To Location.

Assigning Users Privileges Per Ship-To Location

User must meet the following criteria before being assigned privileges per ship-to location:

- registered for and been approved to access Supplier Connection
- added to Supplier Connection by the Administrator
- assigned to the targeted ship-to location

1. Navigate to the View Details screen of the ship-to location for which you wish to assign user privileges. Refer to the section entitled Viewing Ship-To Locations for further details.
2. Click next to the user for whom you wish to assign privileges per location. A list of locations to which this user is assigned is displayed.
3. Click next to the location for which you wish to assign privileges. The edit privileges screen is displayed for this user in the selected location.



4. Enable the checkbox of each privilege you wish to assign to this user within this location.
5. Click **Save**. The screen refreshes, and the privileges are updated for the user.
6. Optionally, repeat steps 1 - 5 as necessary for additional ship to locations.

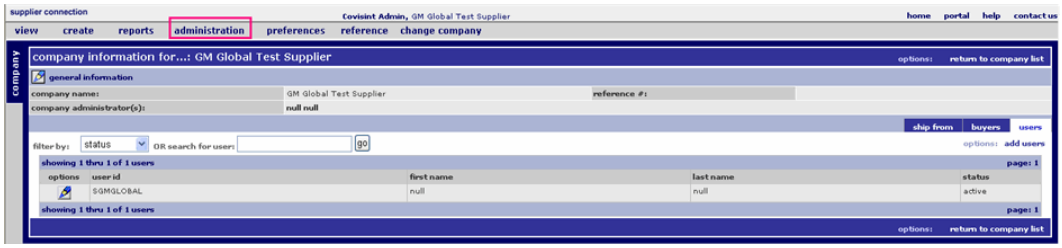
RESULT:

You have successfully assigned privileges for a user per ship-to location.

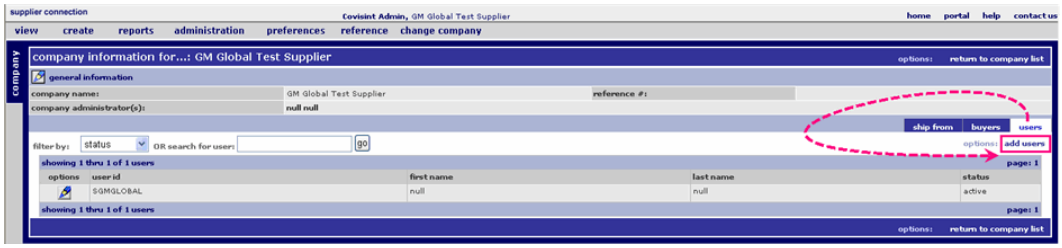
Assigning the Administrator Role

You must be a Supplier Connection Administrator to perform this task!

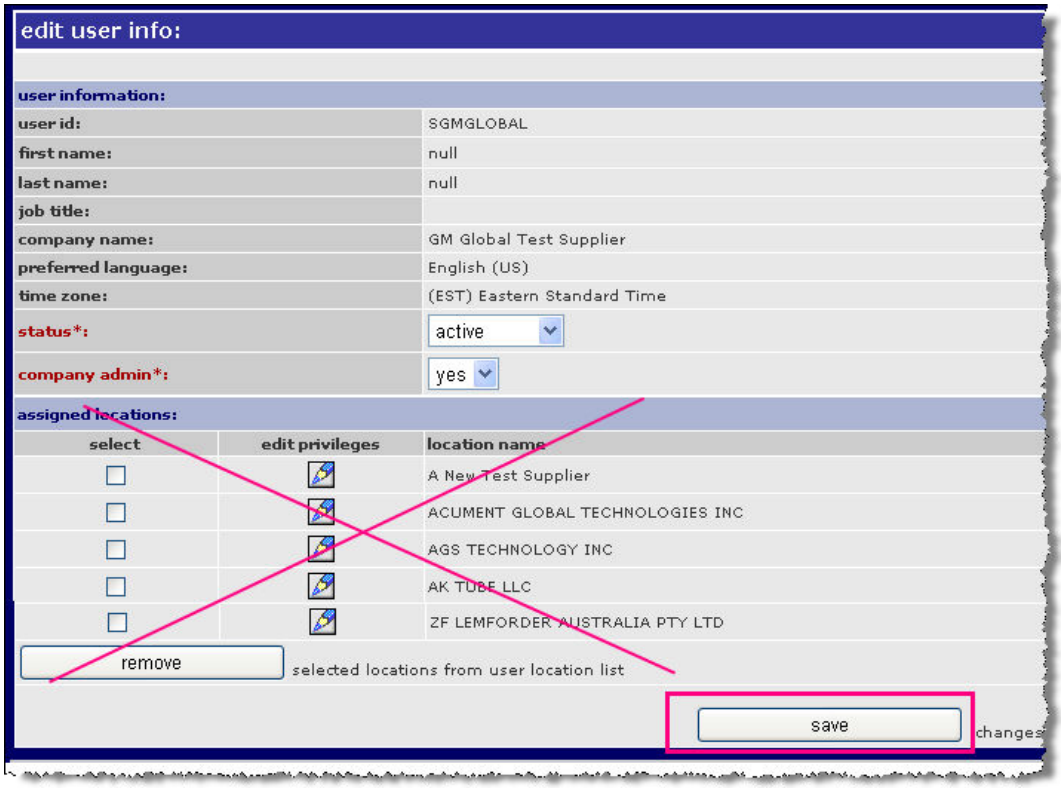
1. Log in to Supplier Connection.



2. Click **administration.**
3. Click **administer company** from the administration drop down menu.



4. Click **users** tab. A list of existing users is displayed.
5. Click  next to the user to whom you wish to assign Administrator role. The edit user information screen is displayed.
6. From the *company admin* drop down menu, select **yes**.
7. Scroll to the bottom of the screen and click **Save**.



RESULT:

You have successfully assigned the Supplier Connection Administrator role to a user.

Deactivating Users from a Location

You must be a Supplier Connection Administrator to perform this task! Users can only be deactivated, and not permanently removed from the system.

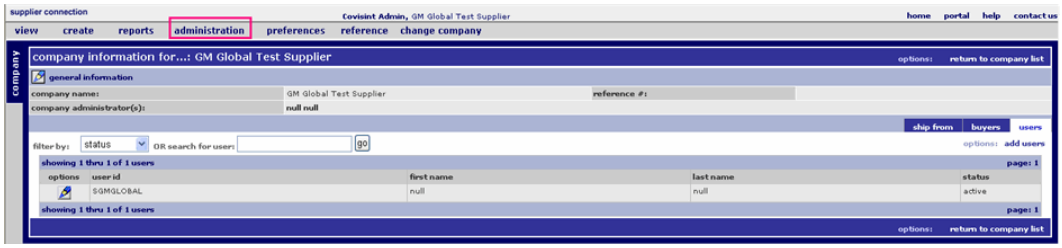
Completing these steps deactivates the user from the location, but not from the Supplier Connection application.

The application is still granted to the user, and will still display to the user in the Application List on the portal (as shown in the image below).

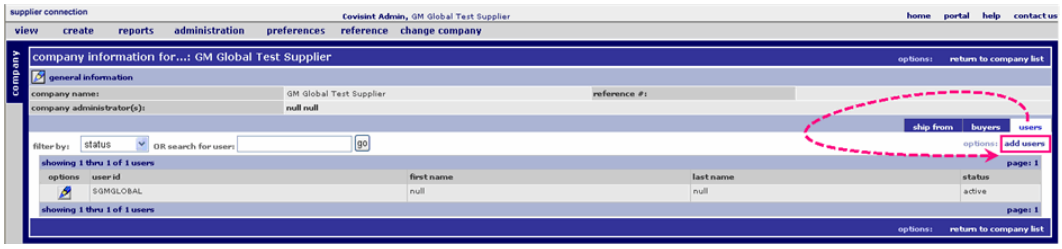
The application grant to Supplier Connection can be revoked by your organization's Security Administrator within the Administration Tools.

If you are unsure of who the Security Administrator is for your organization, click My Administrators.

1. Log in to Supplier Connection.



2. Click **administration.**
3. Click **administer company** from the administration drop down menu.



4. Click **users** tab. A list of existing users is displayed.
5. Click next to the user you wish to remove from Supplier Connection. The edit user information screen is displayed.
6. From the *status* drop down menu, select **deactivated**.
7. Scroll to the bottom of the screen and click **save**.

RESULT:

You have successfully deactivated users from a location. Optionally, revoke the application grant to Supplier Connection. **Learn more >>>**

Completing these steps deactivates the user from the location, but not from the Supplier Connection application.

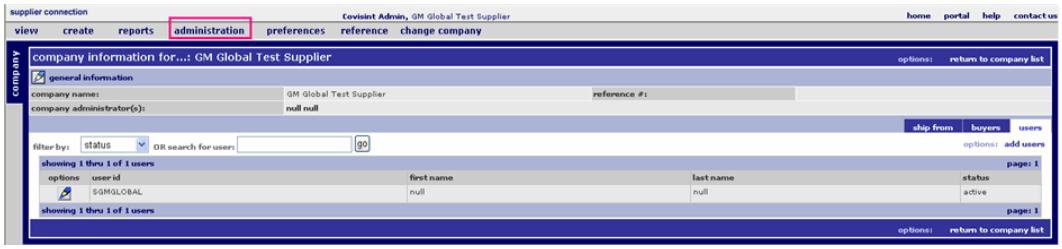
The application is still granted to the user, and will still display to the user in the Application List on the portal (as shown in the image below).

The application grant to Supplier Connection can be revoked by your organization's Security Administrator within the Administration Tools.

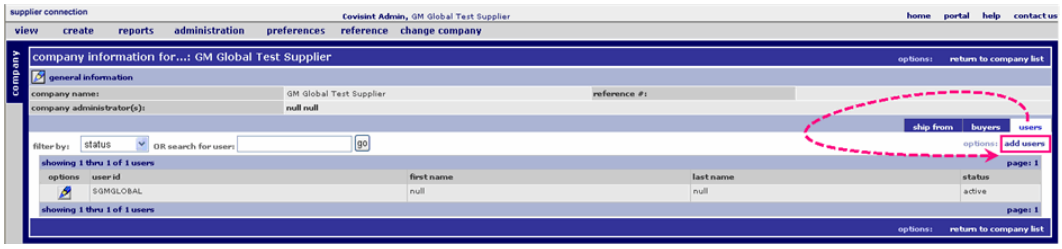
If you are unsure of who the Security Administrator is for your organization, click My Administrators.

Activating Users in a Ship-From Location

1. Log in to Supplier Connection.



2. Click **administration.**
3. Click **administer company** from the administration drop down menu.



4. Click **users** tab. A list of existing users is displayed.
5. Click  next to the user with status of deactivated. The edit user information screen is displayed.
6. From the *status* drop down menu, select **activate**.
7. Scroll to the bottom of the screen and click **save**.
8. Click **return to company list** (in the upper right corner of screen).

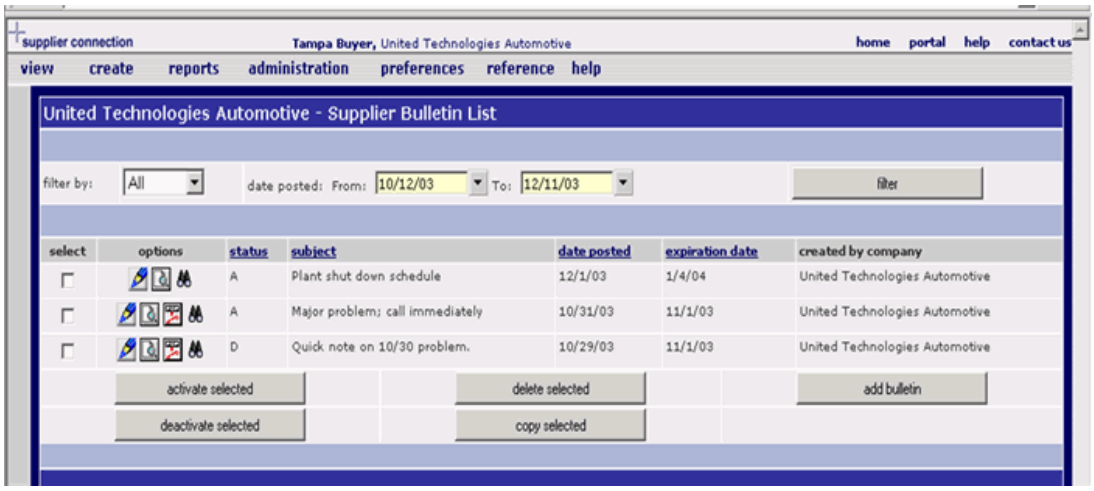
RESULT:

You have successfully activated in a ship-from location.

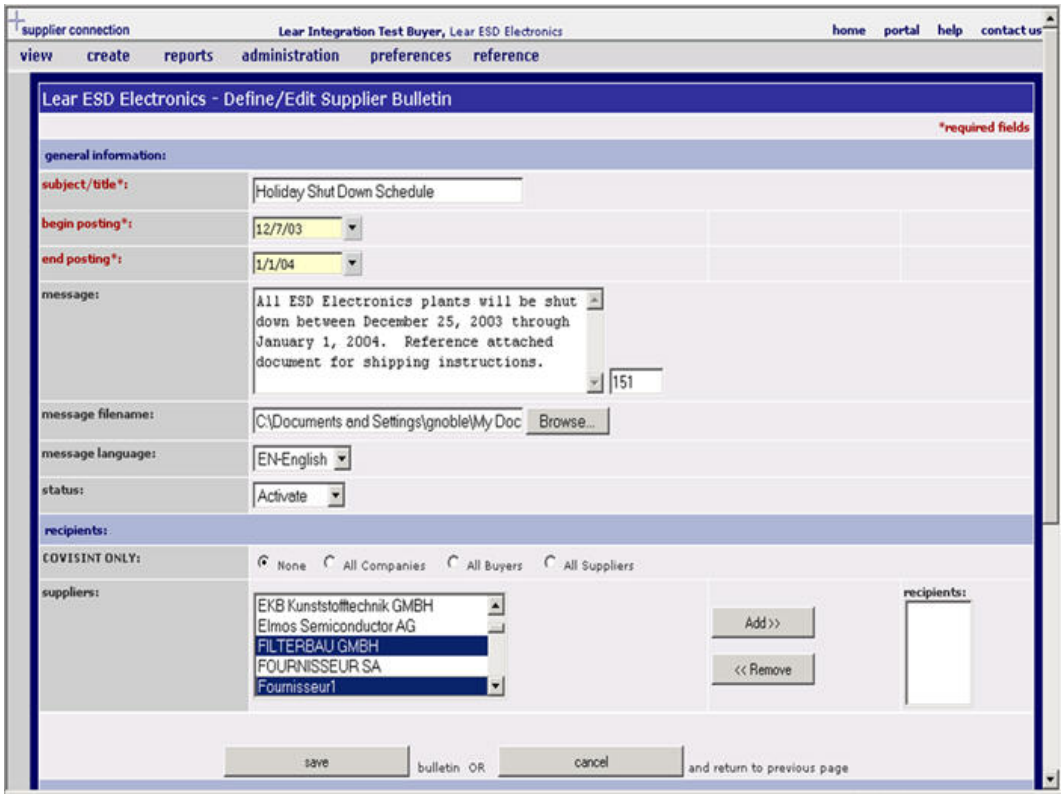
CREATING BULLETINS

You must be a Supplier Connection Administrator to perform this task!

Complete the following steps to create a ***bulletin***.



1. Click **administer bulletins** from the *administration* drop down menu.
2. Click **add bulletin.** The **Create Bulletin screen** is displayed.



3. Key in all required fields (identified with red font):

   a. subject / title - key in the subject of the bulletin as you wish it to appear on the main bulletin list.
   b. begin posting - the date that the bulletin should first be displayed on the main bulletin list. Select the calendar date from the drop down menu.
   c. end posting - the last date that the bulletin should be displayed on the main bulletin list. Select the calendar date from the drop down menu.
4. Optionally, click **browse** to select an attachment to add to the bulletin.
5. Key in optional fields as desired.
6. In the status drop down menu, select either:
   a. Activate - to publish the bulletin as soon as the 'begin posting' date is reached.
   b. Deactivate - to create a draft of the bulletin. it will not be posted on the 'begin posting' date until the status is changed to Activate.
7. Click on the name of each recipient in the Suppliers list (or choose All radio button), then click **Add>>>.**
8. Click **save**. The screen refreshes, and the bulletin is saved in the system.

RESULT:

You have successfully created a bulletin.

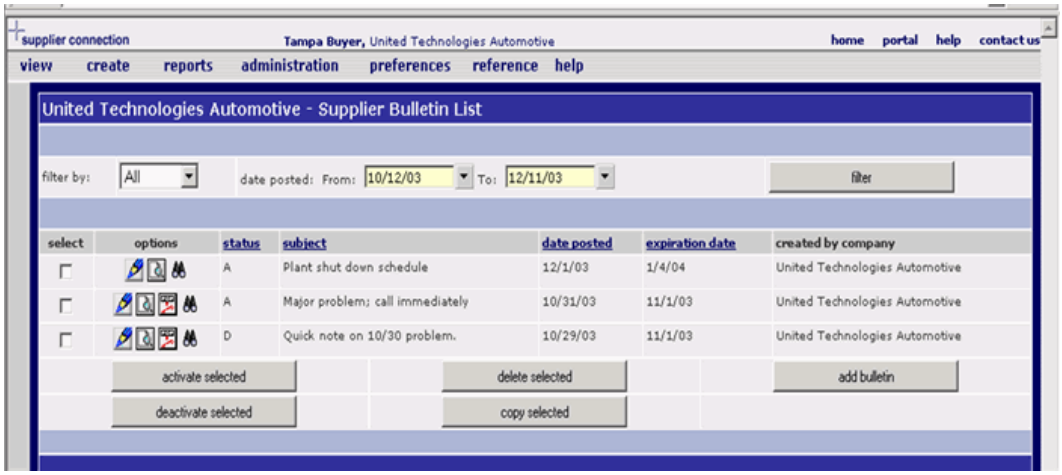
MANAGING BULLETINS

You must be a Supplier Connection Administrator to perform this task!

Complete the following steps to manage ***bulletins*** for your company. **Learn more about bulletin features >>>**

- Bulletins can include a text message and/or PDF attachment.
- Bulletins can be scheduled for automatic posting using an issue date and expiration date.
- Bulletins can be issued for individual suppliers, a group of suppliers or all of a Buyer Company's suppliers.
- Bulletins can be issued based on user's designated language preference.
- Multiple bulletins can be created and concurrently activated.
- Bulletins can be archived, deactivated/reactivated or copied to create a new bulletin.
- Supplier "read status" can be monitored.

1. Click **administer bulletins** from the *administration* drop down menu. A list of current bulletins is displayed.



Icons Defined:

- View text message. Only displayed if text message is available.
- Edit the bulletin.
- View PDF file. Only displayed if PDF has been attached.
- View recipient List. Displays a list of all suppliers in the bulletin's distribution list. Read / Unread status is highlighted.

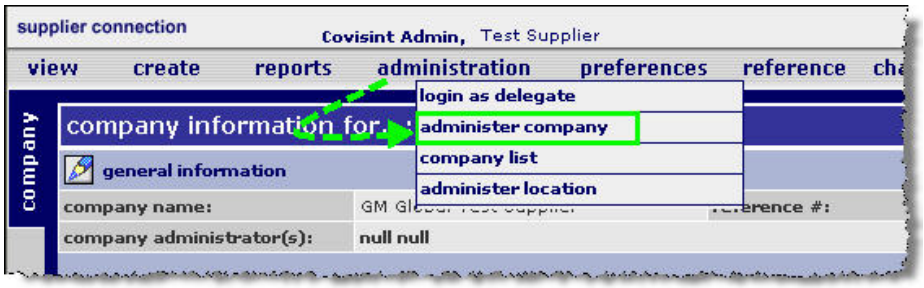
2. Perform one or more of the following:

IF YOU WISH TO...	THEN:
resend an existing bulletin	a. Enable the checkbox of the bulletin you wish to send. b. Click **activate selected.**
activate a draft bulletin	a. Enable the checkbox of the bulletin you wish to send. b. Click **activate selected.**
copy a bulletin	a. Enable the checkbox of the bulletin you wish to copy. b. Click **copy selected.**
create a new bulletin	a. Click **add bulletin**. b. Complete the steps in the section entitled **Creating a Bulletin.**
remove a bulletin from the list	a. Enable the checkbox of the bulletin you wish to remove from the list (but keep it in archives). b. Click **deactivate selected.**
delete a bulletin from the system	a. Enable the checkbox of the bulletin you wish to copy. b. Click **delete selected.**

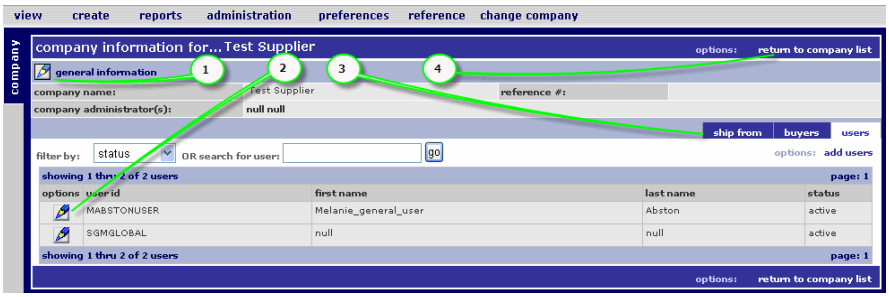
RESULT:

You have successfully managed bulletins.

MANAGING COMPANY INFORMATION



1. From the administration menu, click **administer company**. The Company Information screen is displayed.



Details About The Company Information Screen

1 **General information** - click the icon to edit your company's information.

2 - edit a user's profile

3 **Ship-from** - manage existing ship-from locations and add new locations.

4 **Return to company list** - go back to the Company Information screen

2. Click next to general information link. The Edit Company Information screen is displayed.
3. Edit as necessary.

In the required field: *Send Party ID*, key in **Not Used** in this required field if you do not use a send party ID.

4. Scroll to the bottom of the screen and click **save**.

RESULT:

You have successfully managed company information.