



E-PSR User Manual – Training Module 2 (Supplier):

Supplier Account Management and Adding Users



(www.suppliers.gov.bs)

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GLOSSARY OF TERMS

Activity: an action performed on the Supplier Account by any users allowed access to the account. Activities are recorded and listed in the Activity Log and can be downloaded in Excel format for monitoring purposes.

Activity Centre: the central workspace in a Supplier Account that provides access to all functions within the electronic procurement system, such as supplier profile, account management and tender related activities (response to invitations and tenders).

Activity Log: full audit trail of actions created within the website, from inviting users to creating calendar entries.

Asset: anything that is created in the Supplier Account, such as Supplier Profile, Organisation Profile, or Response, etc. The Supplier Administrator can move assets to another user within the account.

Dashboard: workspace within the Organisation work section that allows the Supplier Administrator to access and manage the Organisation profile and added users.

E-PSR Portal: The electronic Procurement and Supplier Registry web-based system is the Government of The Bahamas' procurement system for online procurement activities.

Group: groups form the organisation/company structure in a Supplier Account. When a Supplier Administrator registers its company, a group with the company business name is created by default. Sub-groups can be created and added by the Supplier Administrator any time.

My Account: one component of the "Account" field accessible to the Supplier Administrator, along with My Organisation, for management purposes.

My Organisation Profile: key business and activities details of the supplier organisation or company.

Organisation: generic term used in a Supplier Account to design the registered supplier entity, whether a business, company, association or individual.

Subscription: category of functions open to the Supplier user within an account and including at the highest role level: Portal, Collaboration Creation, Allow Hierarchy, and Receive Alert. Access to a category of function or subscription is dependent on the role attributed to the supplier user (administrator or simple registered user).

Supplier Administrator: highest role in a Supplier Account that has access to all assets created within the Organisation and has the ability to manage all users. This level of access should be reserved for only one or two users within the Organisation.

Supplier Registered User: lowest role in a Supplier Account that has limited powers under the supervision of the Supplier Administrator. The registered user can edit assets, but cannot publish Profiles, or invite other users or send a tender response.

User Account Profile: key personal information details of the Supplier Administrator of an account.

PURPOSE OF TRAINING MODULE

The purpose of this module is to serve as a reference guide for registered suppliers on how to use the function “**Manage your Account and Add Users**” found on the Activity Centre page of a Supplier Account. This function allows the Supplier Administrator(s) to view and manage the organisation/company account details, create and manage any groups created within the organisation, and also invite new users to join the account in a selected role, whether administrator or simple registered user. The role of a user, administrator or simple user, will define the range of powers and functions accessibility in the account of the user.

Learning Objectives

This training module was created to walk you through the different features available in the context of the management of a Supplier Account on the e-PSR portal. By the end of this hands-on training, you, as Supplier Administrator, will be able to:

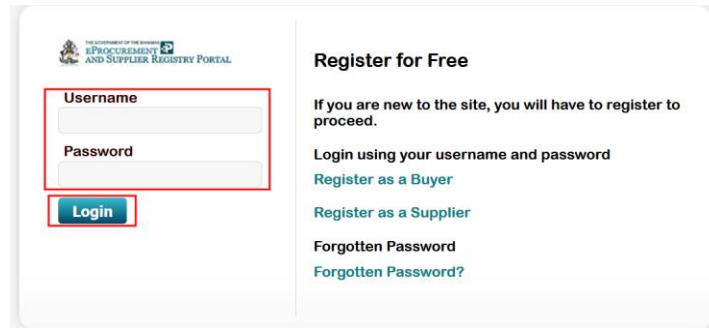
- i) View, review and update the different Profiles described in the account;
- ii) Monitor the activities and actions performed by any user on the account;
- iii) Create sub-groups within the account structure;
- iv) Add and invite other users (of the registered entity) to join the account.

LOGGING IN

You must be a registered supplier to access your organisation’s account on the Electronic Procurement and Supplier Registry Portal. Click the **Login/Registration** button on the e-PRS website (www.suppliers.gov.bs) to log into your account:



Enter your **username** (your registered email address) and **password**. Click on **Login** to proceed:



Register for Free

If you are new to the site, you will have to register to proceed.

Login using your username and password

[Register as a Buyer](#)

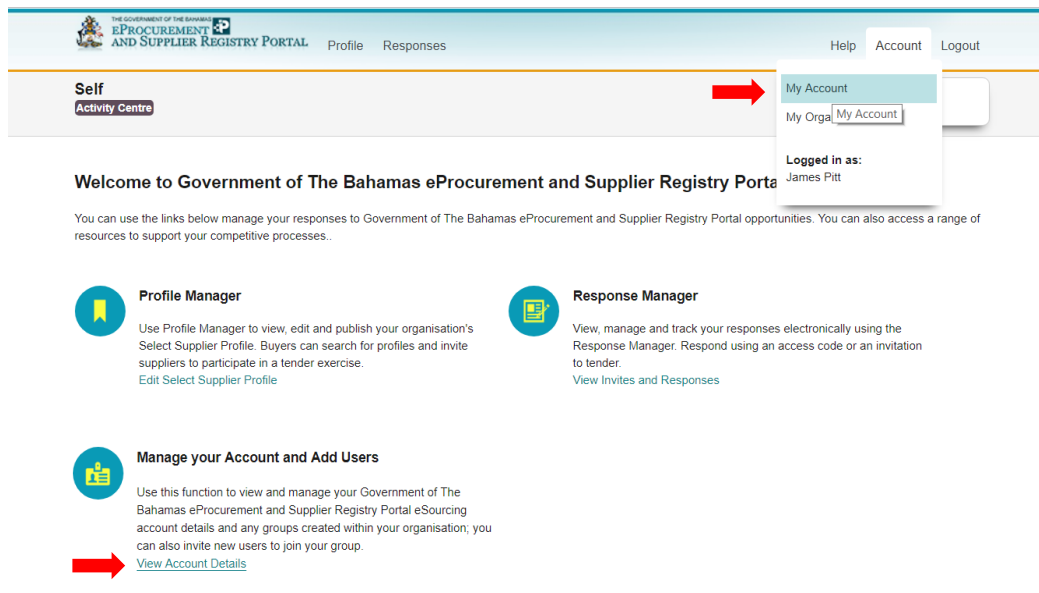
[Register as a Supplier](#)

[Forgotten Password](#)

[Forgotten Password?](#)

MANAGING USER ACCOUNT DETAILS

On the **Activity Centre** page, you (as the Supplier Administrator) can access your account details whether by clicking on **“My account”** from the drop-down menu on the top right-hand corner or on the link **“View Account Details”** at the bottom left-hand corner of the page:



Self
Activity Centre

Profile Responses Help Account Logout

My Account
My Orga My Account

Logged in as:
James Pitt

Welcome to Government of The Bahamas eProcurement and Supplier Registry Portal

You can use the links below manage your responses to Government of The Bahamas eProcurement and Supplier Registry Portal opportunities. You can also access a range of resources to support your competitive processes.

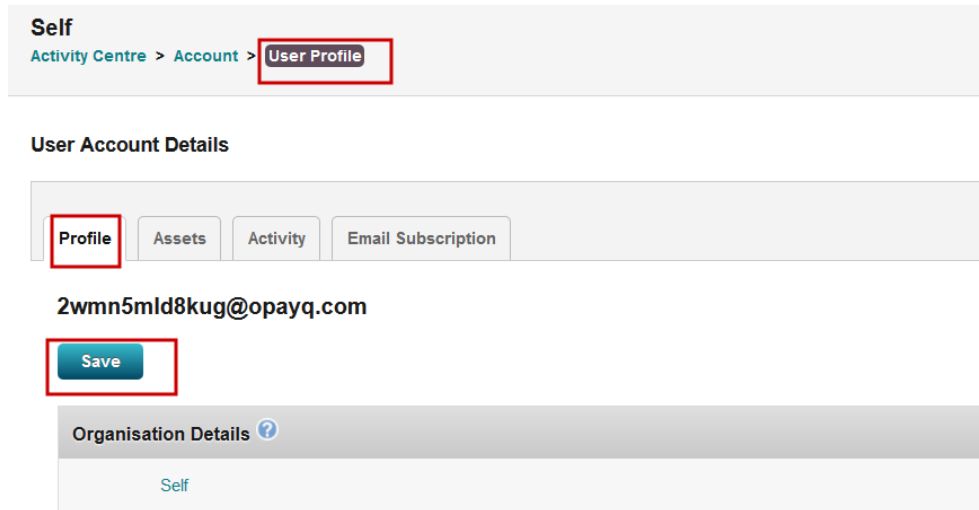
Profile Manager
Use Profile Manager to view, edit and publish your organisation's Select Supplier Profile. Buyers can search for profiles and invite suppliers to participate in a tender exercise.
[Edit Select Supplier Profile](#)

Response Manager
View, manage and track your responses electronically using the Response Manager. Respond using an access code or an invitation to tender.
[View Invites and Responses](#)

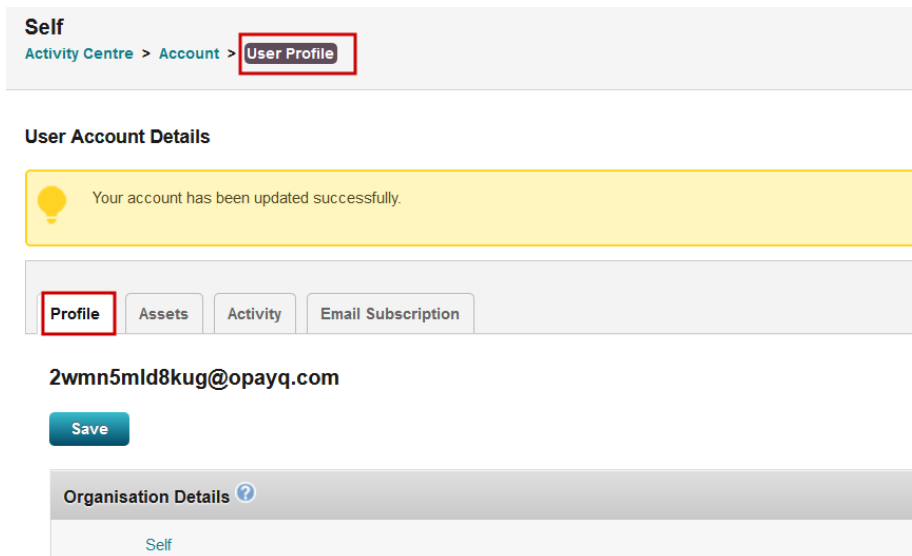
Manage your Account and Add Users
Use this function to view and manage your Government of The Bahamas eProcurement and Supplier Registry Portal eSourcing account details and any groups created within your organisation; you can also invite new users to join your group.
[View Account Details](#)

View & Modify Profile

The **User Account Details** page appears that includes four menu Tabs (Profile, Assets, Activity, and Email Subscription). Click on the **Profile Tab** to review, update or modify your personal details, including email address and password, and click on the **“Save”** button on the left top or bottom page:



A **message** will confirm that the Profile section has been successfully updated and saved:



Note: The information details included both in the User Profile and the Supplier Profile will only be modified in the User Profile when the Supplier Profile is in published status. You will need to unpublish the Supplier Profile, update the details as in the User Profile, and re-publish the Supplier Profile (see Supplier Training Module 1)

View & Transfer Assets

In the next Tab “**Assets**”, you can view all items that you have created on the account. You can transfer to another registered user within your account/organisation any listed assets. Select the relevant items and assign a previously registered user member (see below how to add registered users) in the drop down menu appearing on the screen. The new user will be thus be given the ability to also access and work on the transferred items.

Self
Activity Centre > Account > **User Assets** Alan Pitt
Supplier Administrator

User Assets

Profile **Assets** Activity Email Subscription

2wmn5mld8kug@opayq.com

You can move assets to another user within your organisation. Please select the assets you wish to move then assign to another user using the drop down menu below.

Select: All | None

Asset Type	Name Of Asset	Collaboration Context	Activity Log
<input type="checkbox"/> Supplier Profile	Self	Self	Activity Log
<input type="checkbox"/> Organisation Profile	Self	Self	

2 items found, displaying all items.

Transfer Selected Assets To Other Users in the Organisation

Monitor Activities

You can monitor users’ actions on the account through the **Activity Log** and download the list in an Excel format:

Self
Activity Centre > Account > **Activity Log** Alan Pitt
Supplier Administrator

Activity Log

Profile Assets **Activity** Email Subscription

This log displays all actions performed on this asset and may include actions made by other members of your organisation.

Filter Activity Log

Logged On	User	Action	Event	Asset
16/08/2019 23:27:58	2wmn5mld8kug@opayq.com	User logged in	Login date: Fri Aug 16 23:27:58 EDT 2019, IP:172.17.1.3	Consortium , Organisation Group
16/08/2019 08:05:19	2wmn5mld8kug@opayq.com	User Profile Updated	Updated User Profile: 2wmn5mld8kug@opayq.com to 2wmn5mld8kug@opayq.com	Organisation Group , User
14/08/2019 06:41:31	2wmn5mld8kug@opayq.com	User logged in	Login date: Wed Aug 14 06:41:31 EDT 2019, IP:172.17.1.3	Consortium , Organisation Group
14/08/2019 06:41:31	2wmn5mld8kug@opayq.com	User logged in	Login date: Wed Aug 14 06:41:31 EDT 2019, IP:172.17.1.3	Consortium , Organisation Group

First Prev 1 2 3 Next Last

Export

57 items found, displaying 1 to 25.

Subscribe/Unsubscribe to Email Alerts

The last Tab “**Email subscription**” shows that by default you have subscribed to receiving contract opportunities alerts by publishing the Supplier Profile. If you don’t want to receive email alerts anymore, untick the box and click on the “**Update**” button:

Self
Activity Centre
Account Email Subscription
Alan Pitt
Supplier Admin

Email Subscription

Profile Assets Activity **Email Subscription**

Email Subscription

Would you like to receive email alerts?

Update

MANAGING ORGANISATION ACCOUNT DETAILS

Through the drop down menu Tab “**Account**”, select “**My organisation**” to access elements of the organisation that can be administered, such as the business Profile and the different Users allowed to intervene on the Account:

THE GOVERNMENT OF THE BAHAMAS
ePROCUREMENT AND SUPPLIER REGISTRY PORTAL Profile Responses Help Account Logout

Self
Activity Centre
My Account
My Organisation
Logged in as:
Alan Pitt

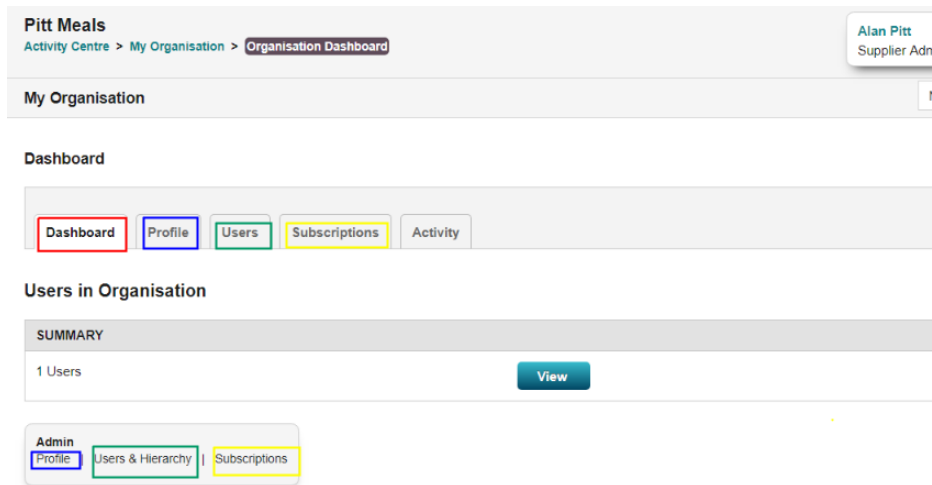
Welcome to Government of The Bahamas eProcurement and Supplier Registry Portal

You can use the links below manage your responses to Government of The Bahamas eProcurement and Supplier Registry Portal opportunities. You can also access a range of resources to support your competitive processes.

Profile Manager **Response Manager**

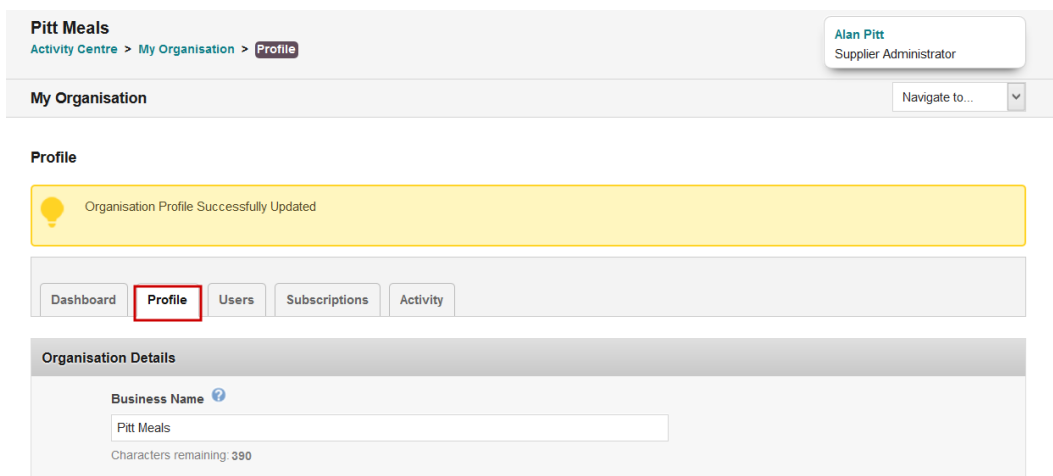
Dashboard

The next screen opens on a central page, the "**dashboard**", where all the elements of the Organisation administration are accessible. The **Profile** and **Users & Hierarchy** Tabs are the main active aspects. Subscriptions and Activity Log Tabs give information status and do not require any specific action:



Organisation Profile

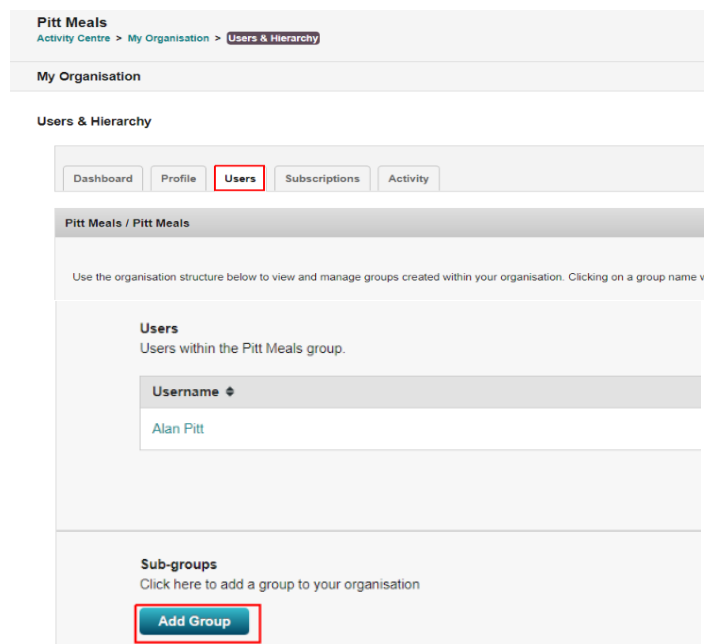
On the business Profile page, you can review, update or modify the Organisation details, including contact information and ISIC codes. Click on the "**Save**" button at the bottom of the Profile page to actualise details. Once saved, a **message** will appear on the page confirming that the Organisation Profile has been successfully updated:



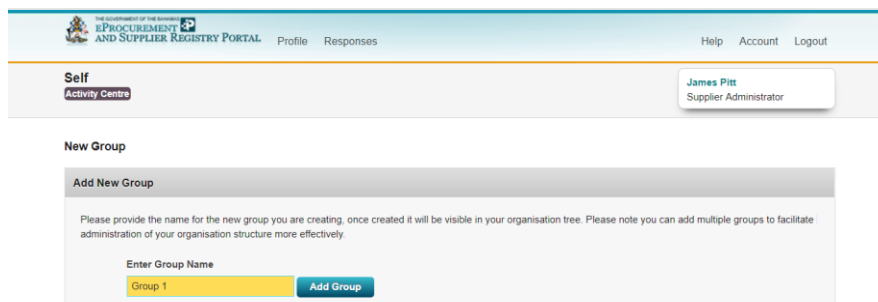
Note/Reminder: The information details included both in the Organisation Profile and the Supplier Profile will only be modified in the Organisation Profile when the Supplier Profile is in “published” status. You will need to unpublish the Supplier Profile, update the details as in the Organisation Profile, and re-publish the Supplier Profile (see Supplier Training Module 1) in order for the updated information to be available to government Buyers.

CREATE AND MANAGE ORGANISATION GROUPS

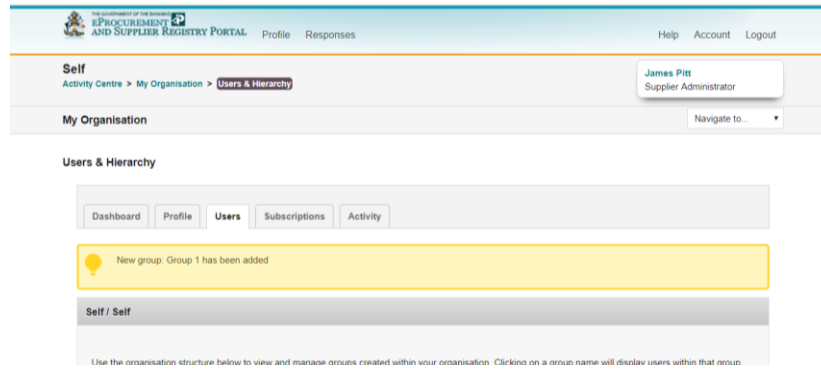
You can manage the structure of your Organisation Account by creating Groups (or sub-groups) where users will be assigned. To create a Group, go to the “Users” Tab on “My Organisation” page and click on the “Add Group” button:



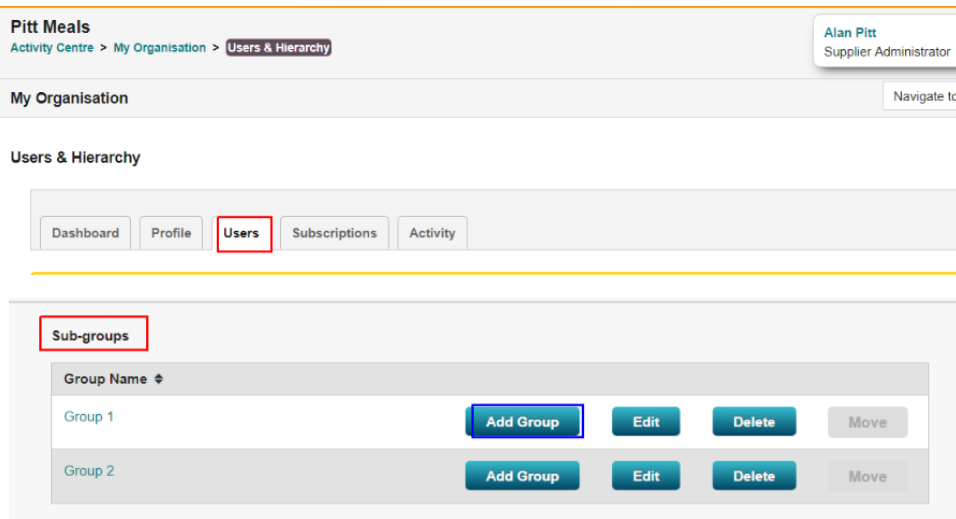
On the new page, enter the name for the new Group you are creating and click on the “Add Group” button:



A **message** will appear to confirm the successful creation of a Group:



Once created, the new Group(s) will be visible in your Organisation tree in the Section “**Sub-groups**” on the “Users” page. You can also create sub-group(s) within a Group by clicking on the button “**Add Group**” (circled in blue). You can change the name of a Group through the “**Edit**” button and also “**Delete**” any Group created:



ADD NEW ACCOUNT USERS

Within the **Users & Hierarchy** page, you can use a specific function to **invite new users** to join your Organisation workspace and manage the progress of invitations (placed below the Add Group function). Click on the **“Invite New Users”** button:

Pitt Meals
Activity Centre > My Organisation > Users & Hierarchy

Alan Pitt
Supplier Administrator

My Organisation Navigate to...

Users & Hierarchy

Dashboard Profile **Users** Subscriptions Activity

Add Group 2 items found, displaying all items.

Invite New Users
Use this function to invite new users to join your organisation and manage progress of invitations.

Invite New Users **View Pending Invitations**

Generate organisation report
Use this to generate a report on the users and groups within the org and the subscriptions they have

Download Org Report

The next page displays the main steps and the status of the process. Click on the **“Add E-mail”** button to continue with the process:

Self
Activity Centre > My Organisation > Users & Hierarchy > Invite Users

James Pitt
Supplier Admini

My Organisation Nav

Invite new users to your organisation

Step One Add User Details **Step Two** Send Invitations **Step Three** Confirmation

This function allows you to invite other people from your organisation to register. In doing so you are confirming that they belong to your organisation.

Email	Name	Role
No users added yet - click the Add Email button		

Add E-mail **Next**

User Details

On the next page, enter the **email address** of the individual you want to add as a User of the account. Then, select the role of this new user in the drop down menu "**Role**", *whether Supplier Administrator or Supplier Registered User*, depending on the powers you want to give the new user. Last, select the **Group**, if any, you want the new user to be associated with, and click on the button "**Add E-mail**" to proceed to the next step:

Self
Activity Centre > My Organisation > Users & Hierarchy > Invite Users

My Organisation

Invite new users to your organisation

Step One Invite User | **Step Two Add Email** | Step Three Add Message | Step Four Confirm

This section will be completed once roles will be defined as that is the information that would be required in help section. Enter email address and invite.

User details

Email address:

Role: SupplierRegisteredUser

Select which Organisation Group the invited user is to be inserted into: Group 1

Add E-mail Cancel

When the message appears confirming that the new user(s) email(s) has/have been added to the invitation list, click on the button "**next**" to continue the process. If you want to add more users, click on the button "**Add E-mail**" and repeat the process:

Invite new users to your organisation

Step One Add User Details | Step Two Send Invitations | Step Three Confirmation

User: 4e50eiu35ue0@...com has been successfully added to your invitation list. Click 'Next' to send invites.

This function allows you to invite other people from your organisation to register. In doing so you are confirming that they belong to your organisation.

Email	Name	Role	
4e50eiu35ue0@...com		Supplier Registered User	Remove E-mail

Add E-mail **Next**

[Return to Organisation](#)

Confirmation Email

Invited user(s) will receive an **email message** confirming that they are invited to register as a *Supplier Registered User or Supplier Administrator* in order to gain access to the Organisation workspace area that is open to them according to their designated role within the Organisation hierarchy:

