

Managing Enterprise Vendor Portal Users

Reference Guide for Vendor
Portal Administrators

Managing Vendor Portal Users

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v. 2020-12-08

Managing Vendor Portal Users

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Managing Vendor Portal Users

Section 1: Introduction

Purpose

The purpose of this guide is to provide you, as a Portal Administrator, with information and tools that will allow you to be successful in executing various tasks in Enterprise Vendor Portal (EVP) including providing access to users within your organization and being the first point of contact for support.

Background

The Enterprise Vendor Portal (EVP) is a single point of entry for all vendors performing online interactions with Loblaw. Each vendor will be assigned one Portal Administrator to be the primary administrator. In addition, up to a maximum of two additional individuals may be designated to act as a back-up to the primary Portal Administrator. The additional Portal Administrators will be able to support the primary Portal Administrator in times where you may not be available/accessible to perform various tasks.

As a Portal Administrator, your key role and responsibilities include:

- Acting as the primary contact within your organization for the EVP
- Managing users in your organization
- Onboarding new users and providing them with the required access to applications within the EVP
- Offboarding users as they leave your organization or change roles

Objective

By completing this guide, you should be able to:

- Create and modify users within the EVP
- Assign Portal Administrators and user roles
- Disable and reactivate users
- Manage user profiles
- Reset user passwords



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Vendor Organization

Vendors are assigned a vendor number (their SAP number) when they are on-boarded during the Vendor Workflow Process. As a Loblaw Companies Limited (LCL) vendor, you will have a unique identifier, which will be used by the Enterprise Vendor Portal.

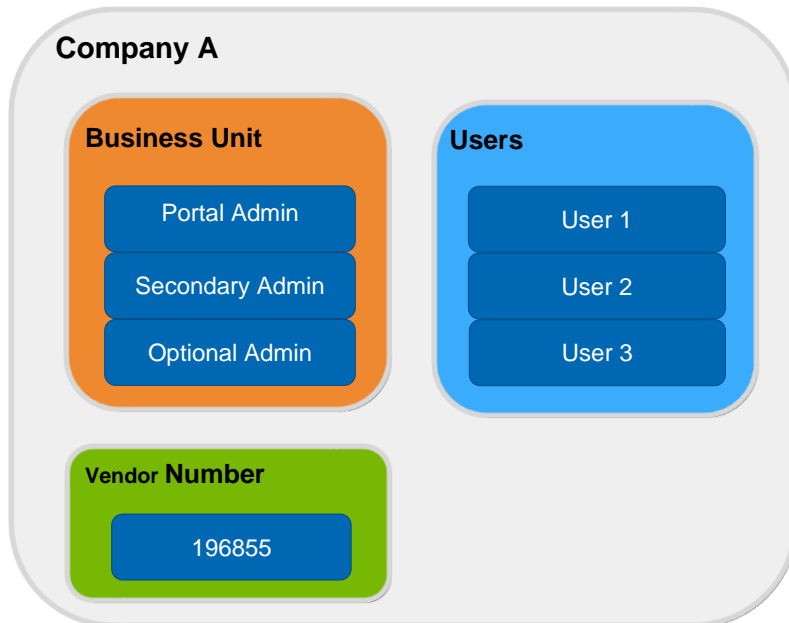
For the purposes of this document, there are two vendor types:

- Single Vendor – a vendor which has only one vendor number
- Multi-Vendor – a vendor that has more than one vendor number

Single Vendor

A single vendor is a single organization with only one vendor number. A single Portal Administrator, with an opportunity to add a secondary administrator, and an optional third administrator.

In the diagram below, you can see that a single vendor will have one or more users, up to three administrators and a single vendor number.



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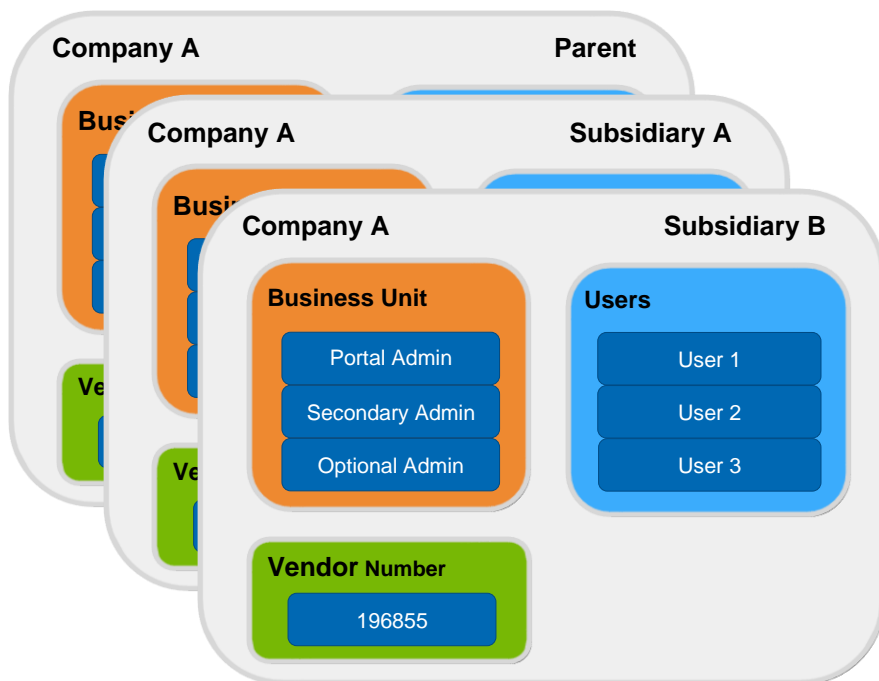
Multi-Vendor

This is an organization that has more than one vendor number with Loblaw. A multi-vendor's parent organization will have its own vendor number plus the associate subsidiaries or divisions. This parent company will have one or more users and have a single Portal Administrator, with an opportunity to add a secondary administrator, and an optional third administrator. A parent Portal Administrator is able to administer users who have access to all the associated vendor numbers: parent, subsidiaries and divisions.

In addition, a multi-vendor may restrict user access to only one subsidiary or division, each with a different vendor number, which can be outlined as follows:

- A subsidiary or division may, but not always, have it's own Portal Administrator that administers users of only that subsidiary's particular vendor number.

In the diagram below, you can see that this multi-vendor is composed of a parent company and two subsidiaries. Each entity will have a number of users, up to three administrators and it's own vendor number.



Section 2: Completing Initial Profile Setup

Once you have been setup on the Enterprise Vendor Portal (EVP) you will receive a welcome e-mail. The welcome e-mail will contain information, including a username and temporary password.

One of the first tasks you will need to complete once you receive your welcome e-mail, is your initial profile setup, which includes changing your temporary password, setting security questions for your password, and entering your contact information.



Your initial profile setup will need to be completed within 90 days of receiving your welcome e-mail; otherwise your account will be disabled.

After setting up your user profile, you be able to access the system and perform any needed functions, such as maintaining users.



For detailed steps on your first time login, please refer to the *First-Time User Login for Vendors* job aid. The link to this document can be found at <https://www.loblaw.ca/en/supplier/> under the *Help* section.


Section 3: Managing Users in the Enterprise Vendor Portal

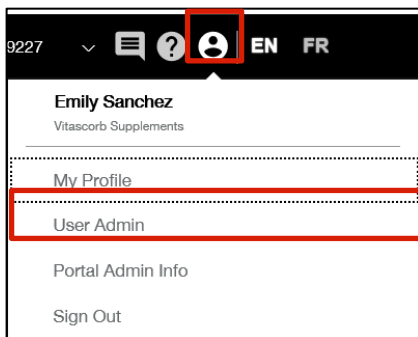
This section will show you how to manage users through the Enterprise Vendor Portal, including how to create, modify, re-activate and reset passwords for users.

Note: Please do not use Firefox to perform these activities as it is not supported in this section of the Vendor Portal. Please use IE, Edge, Chrome or Safari instead.

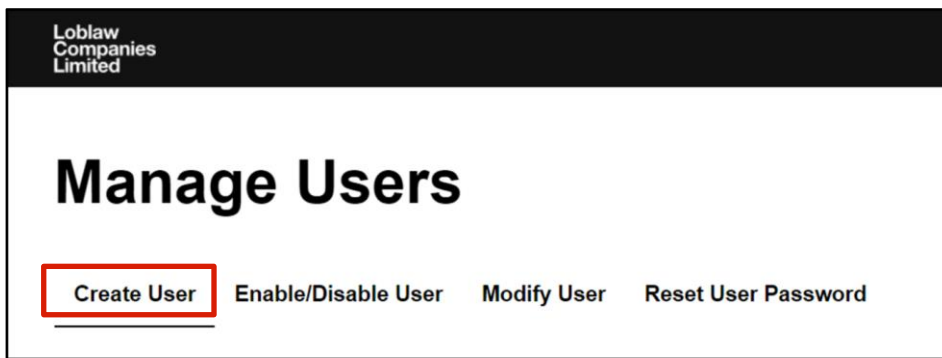
Creating a User (Portal Administrators Only)

To create a new user in the Enterprise Vendor Portal:

1. Navigate to the Enterprise Vendor Portal: <https://www.loblaw.ca/en/supplier/>.
2. Enter your **Username** and **Password**, then click **Login**.
3. In the top-right corner of the Enterprise Vendor Portal, click the  icon and then **User Admin**.

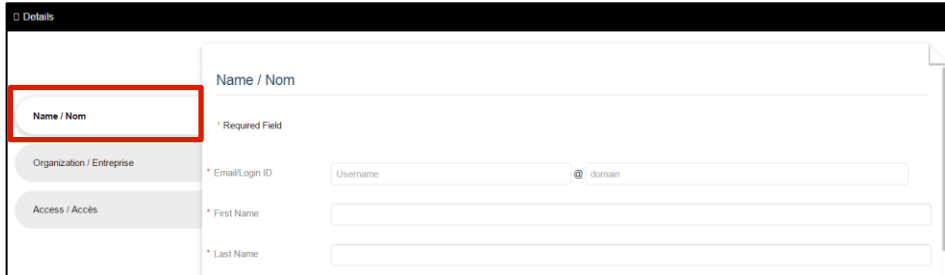


4. Click the **Create User** tab, which will display three sections: "Name", "Organization" and "Access".



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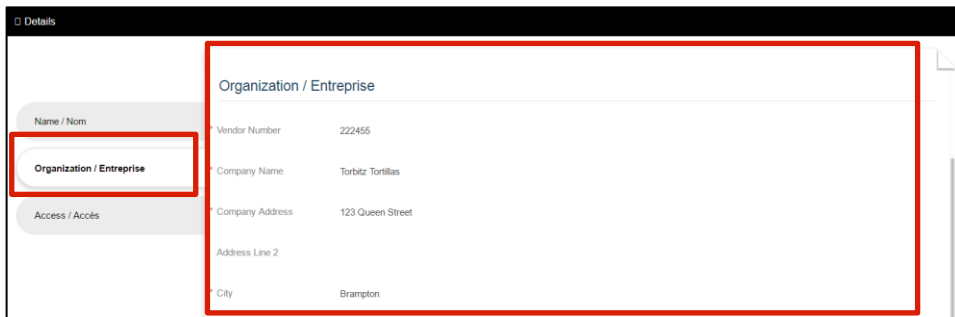
5. Click each section or scroll down to complete the required information.
- **Name** – enter the user’s name and e-mail address. **Note:** An e-mail address must be unique, which means, the same e-mail address cannot be used for more than one user.



The screenshot shows a web form titled "Details" with a sidebar on the left containing three sections: "Name / Nom", "Organization / Entreprise", and "Access / Accès". The "Name / Nom" section is highlighted with a red box. The main form area contains the following fields:

- Name / Nom (Required Field)
- Email/Login ID: Username @ domain
- First Name
- Last Name

- **Organization** – used to verify organization details. Organization details are the same for all users within the same organization.



The screenshot shows the same "Details" form, but the "Organization / Entreprise" section in the sidebar is highlighted with a red box. The main form area displays the following organization details:

- Vendor Number: 222455
- Company Name: Torbitz Tortillas
- Company Address: 123 Queen Street
- Address Line 2
- City: Brampton



It is the Portal Administrator’s responsibility to ensure their users are on-boarded with the correct Privilege level. To on-board an administrator, you must select ‘Portal Administrator’ from the drop-down list. To on-board a user, you must select ‘User’ from the drop-down list.

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- **Access** – in the **Privilege Level** field, select **Portal Administrator** or **Vendor User**. By default, all the available EVP applications are selected. To remove access for the user to a specific application, uncheck the corresponding checkbox and then click **Submit**.

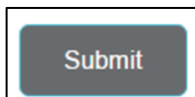
The screenshot shows a user management interface with a sidebar on the left containing tabs for 'Name / Nom', 'Organization / Entreprise', and 'Access / Accès'. The 'Access / Accès' tab is selected and highlighted with a red box. The main content area, also highlighted with a red box, is titled 'Access / Accès' and contains the following fields:

- * Status: Enabled
- * Privilege Level: User
- Application List:
 - Article Workflow ⓘ
 - Food Safety Certificate Management ⓘ
 - Health & Beauty Receivable Reports ⓘ
 - Joint Business Planning Reports ⓘ
 - Quality Issue Management ⓘ
 - Vendor Deal Sheet ⓘ
 - Vendor Income Reports ⓘ
 - Vendor Workflow ⓘ

- **Article Workflow** – create and maintain article listings.
- **Food Safety Certificate Management System (FSCMS)** - Track and validate food safety & food claim information and certificates at a production facility level.
- **Health & Beauty Receivable Reports** – access your health & beauty receivable reports.
- **Joint Business Planning Reports (JBP)** – access your JBP reports.
- **Quality Issue Management** – quality issue management worklists, activities, and documents.
- **Vendor Deal Sheet** – create, update, and review Vendor income proposals.
- **Vendor Income Reports** – Vendor income debit memo search and review settlement reports.
- **Vendor Workflow** – manage updates to your company profile such as general data and shipping locations.

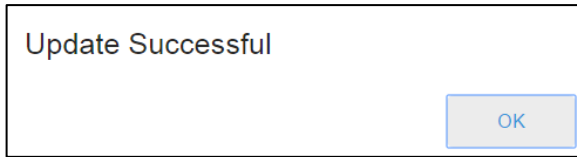
Note: Some applications are not provisioned immediately after initial setup. Access to these applications may take up to one business day to take effect.

6. Click the **Submit** button once you have made the required changes.



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7. After submitting a change, you will see confirmation that the submission was successful.




8. Click **OK** to return to the portal.

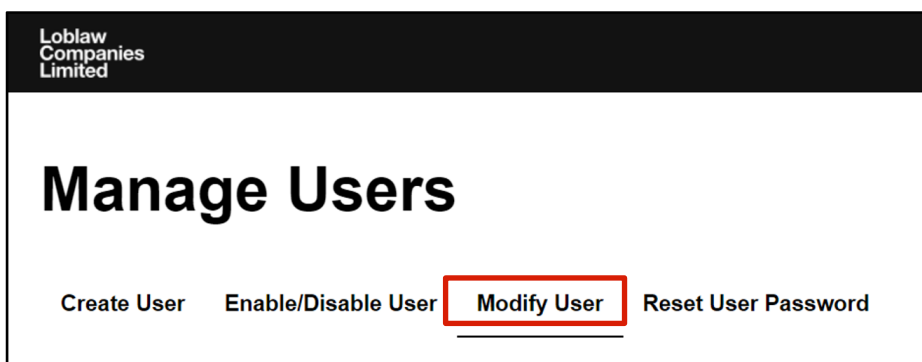


- You can create a maximum of 200 user accounts.
- If you are a secondary Portal Administrator or optional Portal Administrator, contact your primary Portal Administrator for any issues.
- If you are a Primary Administrator, fill out the [Loblaw Vendor Portal Support Form](#) at <https://www.loblaw.ca/en/supplier/> under the *Help Materials* for any issues that you are unable to resolve.

Modifying a User

This section will show you how to modify personal contact information, access to applications or role changes for the user. To do this, perform the following:

1. Navigate to the Enterprise Vendor Portal: <https://www.loblaw.ca/en/supplier/>.
2. Enter your **Username** and **Password**, then click **Login**.
3. In the top-right corner of the Enterprise Vendor Portal, click the  icon and then **User Admin**.
4. Click the **Modify User** tab.

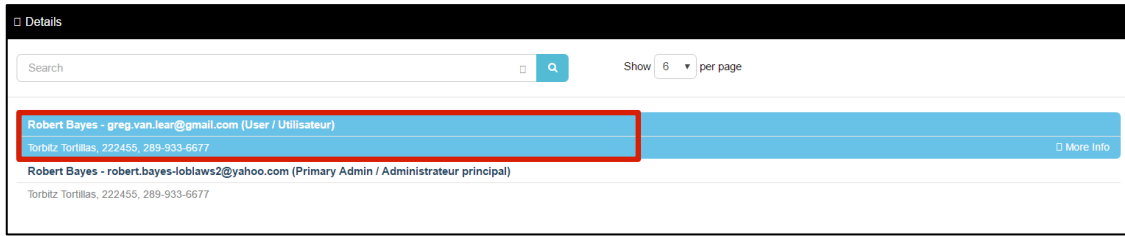


5. In the search bar, enter the name of the user, then click **Search**.



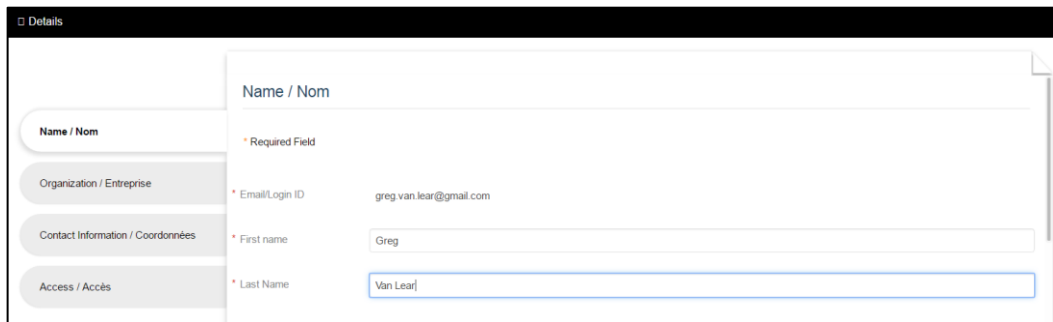
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6. Select the appropriate user from the list.

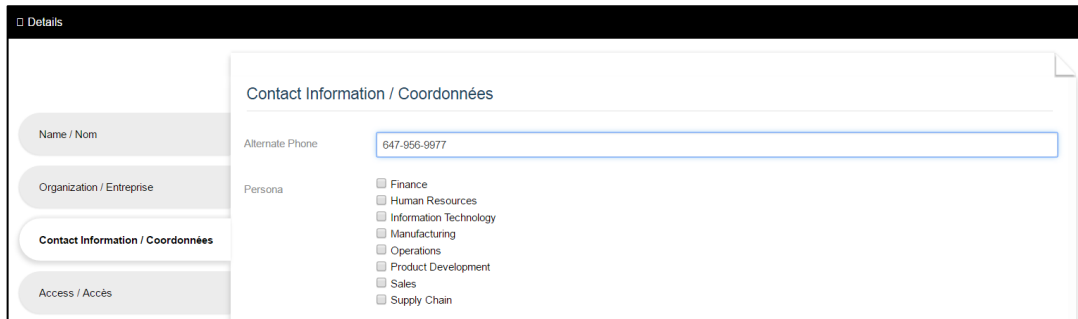


7. Make the required changes on the tabs:

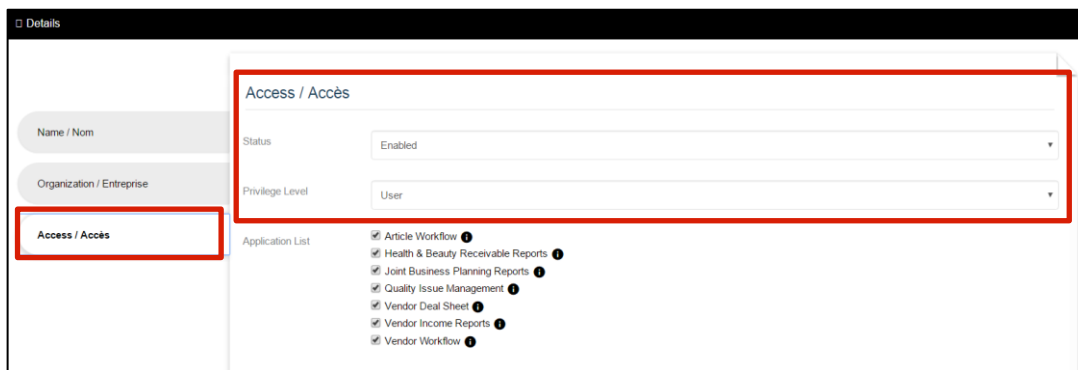
- **Name** – If you need to update the user’s name.



- **Contact information** – If you need to update the user’s contact number and department information.



- **Access** – To change access to specific applications or update the user’s role.



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8. Click the **Submit** button once you have made the required changes.
9. After submitting a change, you will see confirmation that the submission was successful.
10. Click **OK** to return to the main screen.

E-mail Notification


All users of the Enterprise Vendor Portal will receive e-mail notification whenever an update is made to their profile, such as a password reset or when their account has been activated or deactivated.

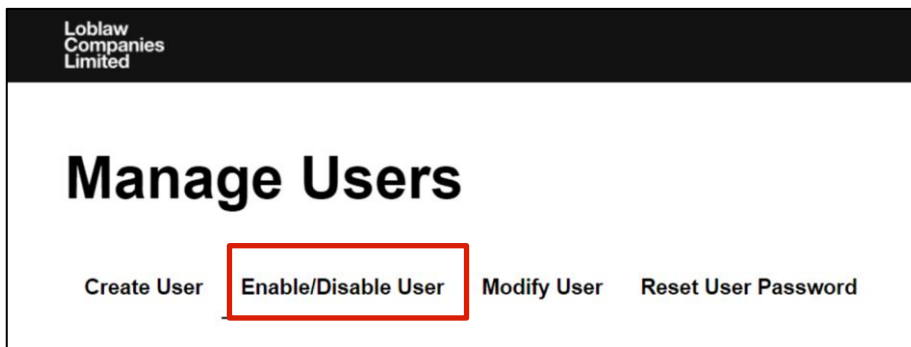
In addition, Loblaw Portal Administrators will receive e-mail notifications regarding system events and any other administration matters.


Reactivating or Disabling a User

If a user within your organization has been inactive for 90 days or has not logged in since the account was created, the account will be automatically disabled. Contact the Portal Administrator to reset the password.

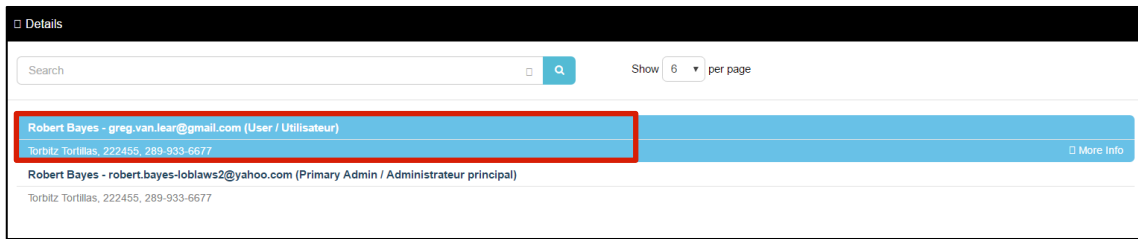
If someone leaves your organization, you will need to disable the account to successfully off-board the user. Follow the steps below to reactivate or disable a user:

1. Navigate to the Enterprise Vendor Portal: <https://www.loblaw.ca/en/supplier/>.
2. Enter your **Username** and **Password**, then click **Login**.
3. In the top-right corner of the Enterprise Vendor Portal, click the  icon and then **User Admin**.
4. Click the **Enable/Disable User** tab.



5. In the search bar, enter the name of the user, then click **Search**. 
6. Select the user to be re-activated from the list.

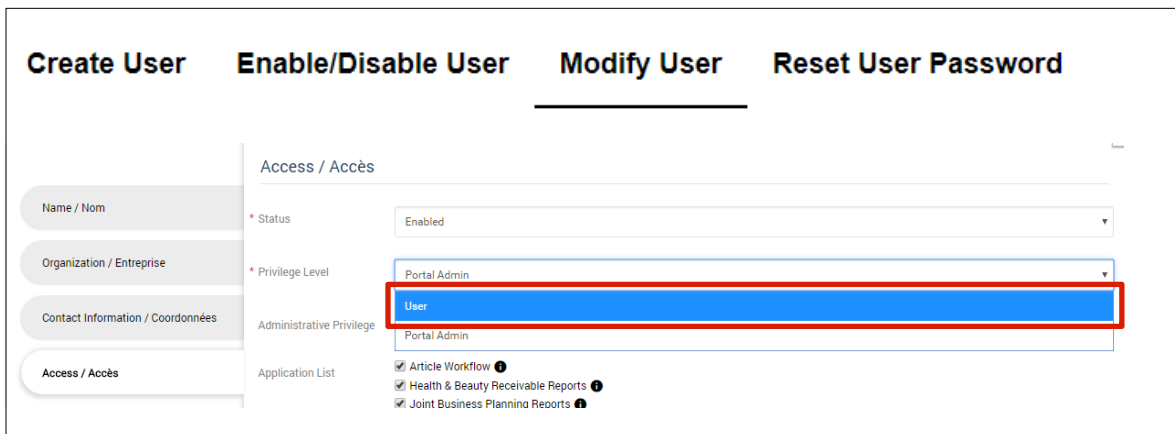
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- You will notice the user's status is currently set to **Enabled** (for an active user) or **Disabled**. Click the drop-down and select:
 - Enabled** – to re-activate a user that is currently inactive.
 - Disabled** – used to inactivate a user that is currently active. This only disables the account and does not delete it.



Note: If you are disabling a Portal Admin, you should change their status from *Portal Admin* to a *User* on the **Modify User tab** which is shown below before disabling their account. If this is not completed they will still appear in the search list as a Portal Admin.




- Click the **Submit** button once you have made the required changes.
- After submitting a change, you will see confirmation that the submission was successful.
- Click **OK** to return to the main screen.

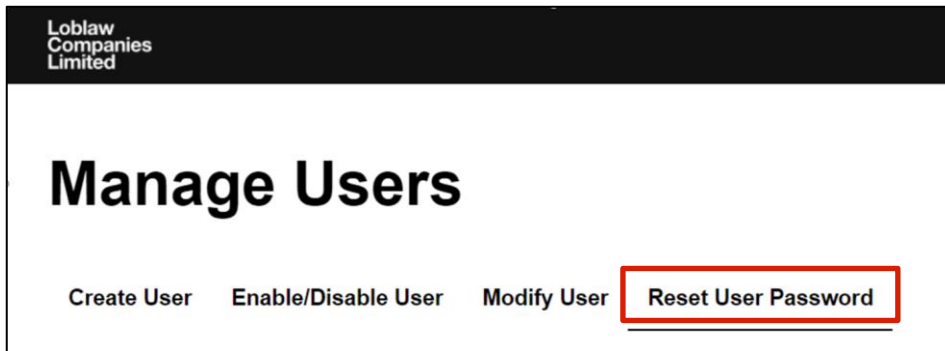
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Resetting a Password

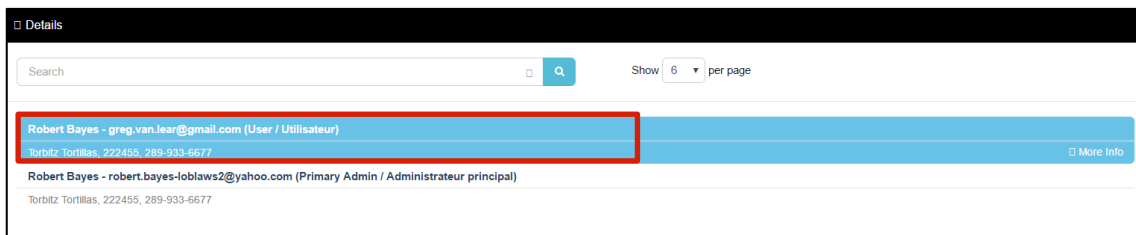
At times, it will be necessary to reset a user's password when they cannot remember it. Resetting a password will trigger an e-mail that will be sent to the user indicating that their password has been reset to a temporary password and they are to login to create their own password.

To perform a password reset:

1. Navigate to the Enterprise Vendor Portal: <https://www.loblaw.ca/en/supplier/>.
2. Enter your **Username** and **Password**, then click **Login**.
3. In the top-right corner of the Enterprise Vendor Portal, click the  icon and then **User Admin**.
4. Click the **Reset User Password** tab.

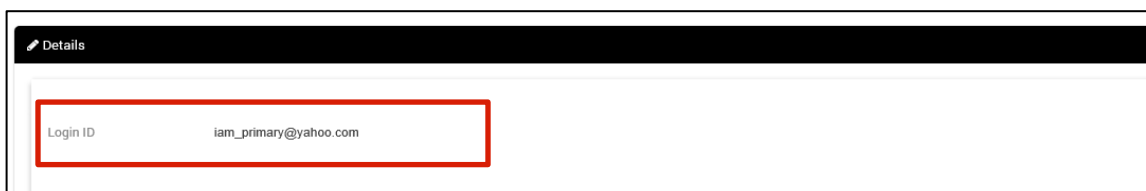


5. In the search bar, enter the name of the user, then click **Search**. 
6. Select the user to be reactivated from the list.



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7. Select the appropriate user from the list, then click **Submit**. An e-mail with a temporary password will be sent to the user.



8. Click the Submit button.
9. After submitting a change, you will see confirmation that the submission was successful.
10. Click **OK** to return to the main screen.

Section 4: User Self-Serve

All users who have access to EVP (Portal Administrators and users) can manage their own profiles. This includes having the ability to modify their contact number and security questions, change passwords or use the “forgot password” function to trigger a temporary password.

Self-serve options consists of the following elements:

1. Update your account contact number
2. Update your security questions
3. Update password information



For detailed steps on Self-Serve, please refer to the *User Self-Serve* job aid. The link to this document can be found at <https://www.loblaw.ca/en/supplier/> under the *Help Materials* section.

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Section 5: Need Help?

Loblaw Enterprise is committed to providing the best support to our vendors. To ensure timely service, please use our support options.

Reference Materials

You can find links to reference guides and job aids right on the Enterprise Vendor Portal web site. At <https://www.loblaw.ca/en/supplier/> look for the section titled Job Aids.

Job Aids

Vendor User: [First-time login](#)
Vendor User: [Account self-service](#)
Vendor Admin: [Create and manage users](#)

Loblaw Help Link

If you are having difficulty and cannot resolve your issue, please fill out the Enterprise Vendor Portal Support form and submit it to us. The help form link can be found on the login page of the portal, as shown below.

Reference Materials

- Control Brand Supplier Policies
- National Brand Supplier Policies
- **Help Materials**

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Broker Consent Form to Access Enterprise Vendor Portal

If you are working with a broker, you can fill out the *Broker Consent Form to Access Enterprise Vendor Portal* form and submit it to us. This will allow the named broker to access all the applications and any data within these applications pertaining to your organization. This will include vendor related general and financial information, reporting, vendor contacts and shipping locations.

Parent Company Authorization to Access Enterprise Vendor Portal

If you have multiple divisions and wish to add a parent organization, you can fill out a *Parent Company Authorization to Access Enterprise Vendor Portal* form. By filling out and submitting this form, you are providing consent to allow individuals with parent company access the ability to access all the applications and any data within these applications pertaining to your organization. This will include vendor related general and financial information, reporting, vendor contacts and shipping locations.