



# CPS Supplier Portal

## Initial Logon and View Policy Acceptances

### Table of Contents

Introduction .....	2
Initial Logon.....	3
Email Confirmation .....	3
Accept CPS Policies .....	7
Accept Disclaimer and Terms and Conditions .....	8
Accept Ethics Policy.....	9
Accept Indebtedness Policy .....	10
Accept Purchase Orders Terms and Conditions.....	11
Set Primary Contact .....	12
Supplier Portal Home Page .....	14
Home Page .....	14
View Acceptance Status.....	15
Change Password .....	16



## **CPS Supplier Portal**

### **Initial Logon and View Policy Acceptances**

#### **Introduction**

Chicago Public Schools (CPS) Supplier Collaboration Network is available to all current suppliers. This application enhances the exchange of information and enables secure transactions between CPS and our suppliers using the Internet and our Oracle Supplier Portal. Suppliers can monitor purchase orders, invoices and payments.

This User Guide is designed to assist you with learning the functionality of the Oracle Supplier Portal. There is an abundance of functionality that exists within the Oracle Supplier Portal.

When utilizing this functionality, please ensure that you use Internet Explorer as your Browser.



# CPS Supplier Portal Initial Logon and View Policy Acceptances

## Initial Logon

Once your request to register a supplier user is approved by Chicago Public Schools, you will receive an email with login credentials and temporary password. You should follow the steps below to successfully confirm your registration and to use the portal.

### Email Confirmation

Step	Action
1.	Open your "Registration Approval" email  This email will be sent to the email address provided on the user account request form.

An example of the "Registration Approval" email is displayed below:

-----Original Message-----

**From:** Oracle Workflow Mailer

**Sent:** Wednesday, February 12, 2020 1:57:47 PM

**To:** OSCAR JIMENEZ

**Subject:** FYI: Chicago Public Schools Supplier Portal: Registration Approval

To **ABC XYZ**  
 Sent **12-FEB-2020 13:57:12**  
 ID **37399385**

Your request to register with Chicago Public Schools for access to its Supplier Portal has been approved. Your Supplier Number is xxxxx. You can now log on to the [CPS Supplier Portal](#) using your username (ABC@ABCD.COM) and the temporary password Xk5\*30C9.

There are training documents posted on the CPS Supplier Portal to help navigate through the site <https://supplier.efs.cps.edu/training.html>

All invoices must be sent to [CPSInvoice@cps.edu](mailto:CPSInvoice@cps.edu)

Any questions regarding payments, invoice processing, and Direct Deposit are to be sent to the **Accounts Payable Department:** [accountspayable@cps.edu](mailto:accountspayable@cps.edu)



## CPS Supplier Portal Initial Logon and View Policy Acceptances

Vendors will become inactive if there has not been any activity for **12 months**. To be reactivated, inactive vendors must follow the same process as a new vendor.

Please remember, Chicago Public Schools [Board Rule 7-13\(b\)](#) requires that all CPS vendors **must obtain an approved purchase order prior to providing any goods and/or services**. If a company or individual delivers goods and/or provides services to a CPS School or Department without an approved purchase order, payment to the company or individual is not guaranteed and invoice processing may be delayed.

If you have any further questions or require additional information, please contact [Purchasing@cps.edu](mailto:Purchasing@cps.edu).




# CPS Supplier Portal

## Initial Logon and View Policy Acceptances

Step	Action
2.	Click on the <a href="#">CPS Supplier Portal</a> link to access the CPS Supplier Portal Website Page. You can access the Supplier Portal page either through <a href="https://supplier.efs.cps.edu">https://supplier.efs.cps.edu</a> or directly by clicking the link contained in your registration confirmation email.

The CPS Supplier Portal website is displayed.

[Welcome](#) [Training](#) [Contact](#)

## CPS Supplier Portal

Welcome to the CPS Supplier Portal! Chicago Public Schools has a district-wide initiative for paperless collaboration with our Suppliers, and this Supplier Portal is designed to enhance communication and collaboration with our Suppliers. Through this portal, Suppliers will have access to the following:

- Download approved purchase orders and view purchase order history
- Request email delivery of purchase orders
- Review invoices and payment status
- Provide updates to business information

### New Features

Beginning March 6, 2020, CPS is introducing a new **Business Administrator** access role for CPS Supplier Portal users. All users will continue to be able to view purchase orders and payment information, as well as manage supplier contacts. Users with the Business Administrator role will also have access to update your organization's business information in the CPS Supplier Portal, as well as designate who else within your organization should be a Business Administrator.


As part of this change, all CPS Suppliers will be required to select one (1) **Primary Contact**. The Primary Contact will be the one point of contact for CPS business communications, will have Business Administrator access to update the Supplier Portal, and will also be responsible for completing the upcoming CPS Yearly Attestation in order to remain an active CPS Supplier.

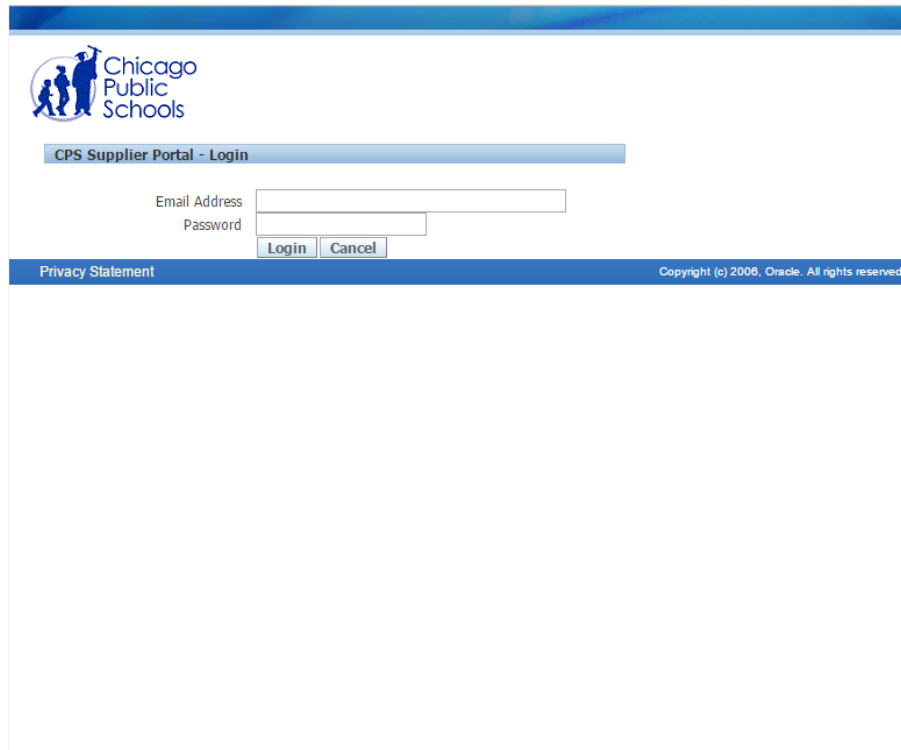
### Supplier Login

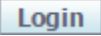
[Login](#) [Reset Password](#)



## CPS Supplier Portal Initial Logon and View Policy Acceptances

Step	Action
3.	Click on the  button. This will open the Supplier Portal Login page in a new tab.



Step	Action
4.	Enter the <b>User Name</b> (Email Address) This is the email address that you entered on the account request form.
5.	Enter the <b>Password</b> This is the temporary password that you were assigned in the registration acceptance email.
6.	Click the  button

Upon initial login or if you haven't accepted all of the CPS Policies, you will be re-directed to the Policies Acceptance Page.



# CPS Supplier Portal Initial Logon and View Policy Acceptances

## Accept CPS Policies

You will need to review and accept the various policies to comply with Code of Ethics, Indebtedness, Purchase Order Terms and Conditions, and Portal Usage.

The screenshot shows the Oracle Policies Acceptance Page. At the top, the Oracle logo is visible. Below it, the page title is "Policies Acceptance Page". The page displays the following information:

- Supplier Name: XYZ Corp
- Supplier Number: 887799
- User Name: AAB@XYZ.COM

A "Cancel" button is located in the top right corner. Below the user information, there is a note: "NOTE You must accept the following policies before you may enter the site." Underneath the note is a "View Policy" button. A table titled "Select Policy Name" contains the following items:

Select Policy Name
<input type="radio"/> Disclaimer and Terms and Conditions
<input type="radio"/> Ethics Policy
<input type="radio"/> Indebtedness Policy
<input type="radio"/> Purchase Orders Terms and Conditions

At the bottom right of the page, there is another "Cancel" button. The footer contains links for "About this Page" and "Privacy Statement", and a copyright notice: "Copyright (c) 2008, Oracle. All rights reserved."



## CPS Supplier Portal Initial Logon and View Policy Acceptances

### Accept Disclaimer and Terms and Conditions

Step	Action
1.	Select 'Disclaimer and Terms and Conditions' and click on View Policy. The policy document will be displayed.

Step	Action
2.	<p>Read through the policy and confirm your acceptance at the top of the window.</p> <p>Click the <b>I Accept</b> checkbox option, enter your Initials and click the <b>ACCEPT</b> button.</p> <p>You will be redirected to the Policies Acceptances Page where the remaining unaccepted policies, if any, will be displayed.</p>





# CPS Supplier Portal Initial Logon and View Policy Acceptances

## Accept Ethics Policy

Step	Action
1.	Select 'Ethics Policy' and click on View Policy. The policy document will be displayed.

**ORACLE**

Welcome to the Supplier Portal User Policies Acceptance

**Ethics Policy**

✔ **NOTE** By checking the box and typing your initials, the Supplier agrees to the Ethics Policy shown on this page.

I Accept  \* Initials  **Accept** Cancel/Return

**Chicago Public Schools Policy Manual**

**Title:** CODE OF ETHICS  
**Section:** 503.1  
**Board Report:** 11-0525-PO2 **Date Adopted:** May 25, 2011

**Policy:**

**THE CHIEF EXECUTIVE OFFICER RECOMMENDS:**

That the Board rescind Board Reports 04-0623-PO4 and 10-0526-RS14 and adopt a new Code of Ethics.

**PURPOSE:** The Chicago Board of Education is committed to ensuring that Board Members, Local School Council members, and Officials and Employees act in the highest ethical manner in order to preserve the public trust of residents and taxpayers. Further, it is essential to set a good example for and act in the best interest of Chicago Public School students. In order to meet these imperatives, the following ethical

Privacy Statement Copyright (c) 2006, Oracle. All rights reserved.

Step	Action
2.	<p>Read through the policy and confirm your acceptance at the top of the window.</p> <p>Click the <b>I Accept</b> checkbox option, enter your <b>Initials</b> and click the <b>ACCEPT</b> button.</p> <p>You will be redirected to the Policies Acceptances Page where the remaining unaccepted policies will be displayed.</p>



## CPS Supplier Portal Initial Logon and View Policy Acceptances

### Accept Indebtedness Policy

Step	Action
1.	Select 'Indebtedness Policy' and click on View Policy. The policy document will be displayed.

Step	Action
2.	<p>Read through the policy and confirm your acceptance at the top of the window.</p> <p>Click the <b>I Accept</b> checkbox option, enter your Initials and click the <b>ACCEPT</b> button.</p> <p>You will be redirected to the Policies Acceptances Page where the remaining unaccepted policies will be displayed.</p>



# CPS Supplier Portal Initial Logon and View Policy Acceptances

## Accept Purchase Orders Terms and Conditions

Step	Action
1.	Select 'Purchase Orders Terms and Conditions' and click on View Policy. The policy document will be displayed.

**ORACLE**

Welcome to the Supplier Portal User Policies Acceptance

**Purchase Orders Terms and Conditions**

✔ **NOTE** By checking the box and typing your initials, the Supplier agrees to the Purchase Orders Terms and Conditions shown on this page.

I Accept  \* Initials

**PURCHASE ORDER TERMS AND CONDITIONS**

**INSTRUCTIONS TO VENDOR**

This order is subject to the following instructions, terms and conditions.

- Under no circumstances is the amount of this purchase order to be exceeded without prior approval of the school or originating unit.
- Our purchase order number must appear on all invoices, delivery memoranda, bills of lading, packages, and correspondence.
- Address all communications concerning this purchase order to the school or originating unit.
- Non-construction funded Purchase Orders are generally cancelled after one (1) year after the date of issuance. Grant funded purchase orders have the cancellation date printed in bold letters on the face of the purchase order. All deliveries, invoices, and payments must be made before the purchase order cancels.
- Steven's Amendment – Activities for the below funds are provided by
 

220- Federal Special Education IDEA Programs	336- NCLB Title V Fund	362-Early Childhood Development
324- Miscellaneous Federal, State & Local Grants	353- Title II - Teacher Quality	367-Title I - Comprehensive School Reform
332- NCLB Title I Regular Fund	356-ELL & Bilingual Programs	369-Title I - School Improvement: Carl Perkins
334- NCLB Title I - Neglected & Delinquent	358-Title IV Safe & Drug Free Schools	

**CONDITIONS OF PURCHASE**

- Validation:** A purchase order is valid only when the following conditions have been met.
  - A purchase order number appears in the space provided.
- Authorization:** The Board of Education will not be responsible for articles delivered and/or services performed without a specific written order.
- Articles of Service:** articles to be delivered and/or services performed shall be in accordance with the terms, prices, delivery time, specifications, and conditions as recorded on your bid proposal

Privacy Statement Copyright (c) 2008, Oracle. All rights reserved.

Step	Action
2.	<p>Read through the policy and confirm your acceptance at the top of the window.</p> <p>Click the <b>I Accept</b> checkbox option, enter your Initials and click the <b>ACCEPT</b> button.</p> <p>You will be redirected to the Policies Acceptances Page where the remaining unaccepted policies will be displayed.</p>



## CPS Supplier Portal Initial Logon and View Policy Acceptances

### Set Primary Contact

Once all policies have been accepted, you will be logged out of the system and re-directed back to the Supplier Portal Login page.

Step	Action
4.	Enter the <b>User Name</b> (Email Address) This is the email address that you entered on the account request form.
5.	Enter the <b>Password</b> This is the temporary password that you were assigned in the registration acceptance email.
6.	Click the <b>Login</b> button

Enter your credentials. On validation, you will be re-directed to the Primary Contact page (where you will see all your active user accounts) if you have not set one user as Primary contact for your CPS Supplier account. One Primary contact is mandatory and he/she will be the one point of contact for CPS business communications, will have access to update Supplier Account business information in the Supplier Portal.



# CPS Supplier Portal Initial Logon and View Policy Acceptances

**Primary Contact**

Cancel Confirm

**Primary Contact Details**

CPS recently updated the Supplier Portal, and all CPS Suppliers are now required to identify a Primary Contact for their CPS Supplier Account. The Primary Contact will be the one point of contact for CPS business communications, will have access to update Supplier Account business information in the iSupplier Portal, and will also be responsible for completing the new CPS Yearly Attestation in order to remain an active CPS Supplier.

From the following list of contacts at your organization, please select the one user who will be the Primary Contact for your CPS Supplier Account

Select User Name	Contact First Name	Contact Last Name	Job Title	Phone Area Code	Phone Number	Phone Extension
<input checked="" type="radio"/> AAB@XYZ.COM	John	Smith	CEO	878	1112222	
<input type="radio"/> PP@XYZ.COM	Parker	Peter	Supervisor	222	2221111	
<input type="radio"/> PJ@XYZ.COM	Peter	James	Analyst	111	2223333	
<input type="radio"/> JS@XYZ.COM	Smith	John	Manager	222	1112222	

Cancel Confirm

Select one user and click on 'Confirm' button to set your Primary account.

If you have already set the Primary Contact for your Supplier account you will be directed to the Portal Home page (see below).

ORACLE E-Business Suite

Favorites Diagnostics Logout Preferences Help

Oracle Applications Home Page

Logged In As AAB@XYZ.COM

**Main Menu**

Personalize

- CPS Supplier Portal (Supplier Access)
- Home Page
- View Acceptance Status

**Worklist**

Full List

From	Type	Subject	Sent	Due
Waites, Nicole	PO Approval	<a href="#">CPS Business Group - Standard Purchase Order 3671179_0</a>	27-Feb-2020	
Supplier User Registration Workflow Version 2 <a href="#">Chicago Public Schools Supplier Collaboration Network: Confirmation of Registration</a> 26-Feb-2020				
✓TIP Vacation Rules - Redirect or auto-respond to notifications.				
✓TIP Worklist Access - Specify which users can view and act upon your notifications.				



# CPS Supplier Portal Initial Logon and View Policy Acceptances

## Supplier Portal Home Page

The portal is organized into two main menu options as displayed below.

The screenshot shows the Oracle E-Business Suite interface. At the top, it says 'ORACLE E-Business Suite' and 'Logged In As HF@GMAIL.COM'. The main area is divided into two sections: 'Main Menu' and 'Worklist'. The 'Main Menu' includes links for 'CPS Supplier Portal (Supplier Access)', 'Home Page', and 'View Acceptance Status'. The 'Worklist' section contains a table with columns for 'From Type', 'Subject', 'Sent', and 'Due'. Below the table are two tips: 'TIP Vacation Rules' and 'TIP Worklist Access'.

From Type	Subject	Sent	Due
Supplier User Registration Workflow Version 2	Chicago Public Schools Supplier Collaboration Network: Confirmation of Registration	13-Feb-2020	

## Home Page

The Home page provides access to all self-service functionality through tabs.

You may navigate to Order to view Purchase Order related Information. The 'Shipment' Tab will display Receipt related Information. The 'Accounts' tab has the details of the Invoice and the Payments.

The screenshot shows the Oracle iSupplier Portal interface. At the top, it says 'ORACLE iSupplier Portal'. Below the header, there are navigation tabs: 'Home', 'Orders', 'Shipments', 'Accounts', and 'Admin'. A search bar is present with 'PO Number' selected. The main area is divided into several sections: 'Notifications', 'Orders At A Glance', and a sidebar with 'Orders', 'Receipts', 'Invoices', and 'Payments'. The 'Orders At A Glance' section has a table with columns for 'PO Number', 'Description', and 'Order Date'. The sidebar lists links for 'Agreements', 'Purchase Orders', 'Purchase History', 'Receipts', 'Invoices', and 'Payments'.



## **CPS Supplier Portal**

### **Initial Logon and View Policy Acceptances**

#### [View Acceptance Status](#)

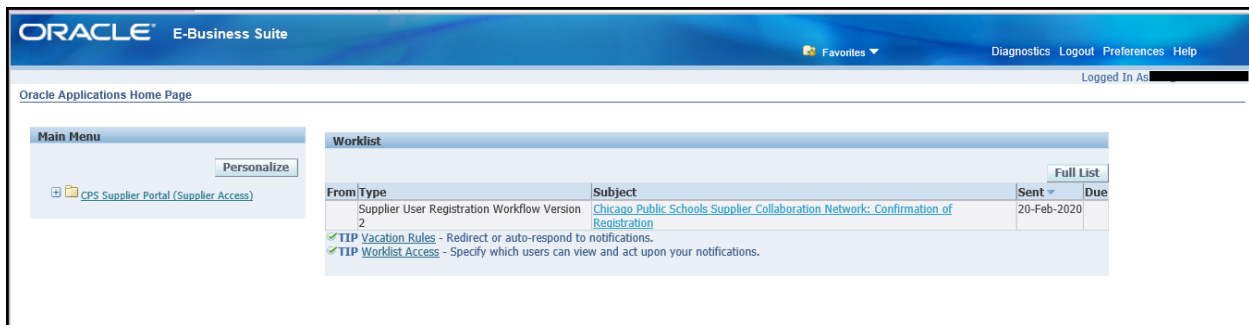
Allows users to review the policies accepted during the initial logon. Users can use this link to read the documents anytime.



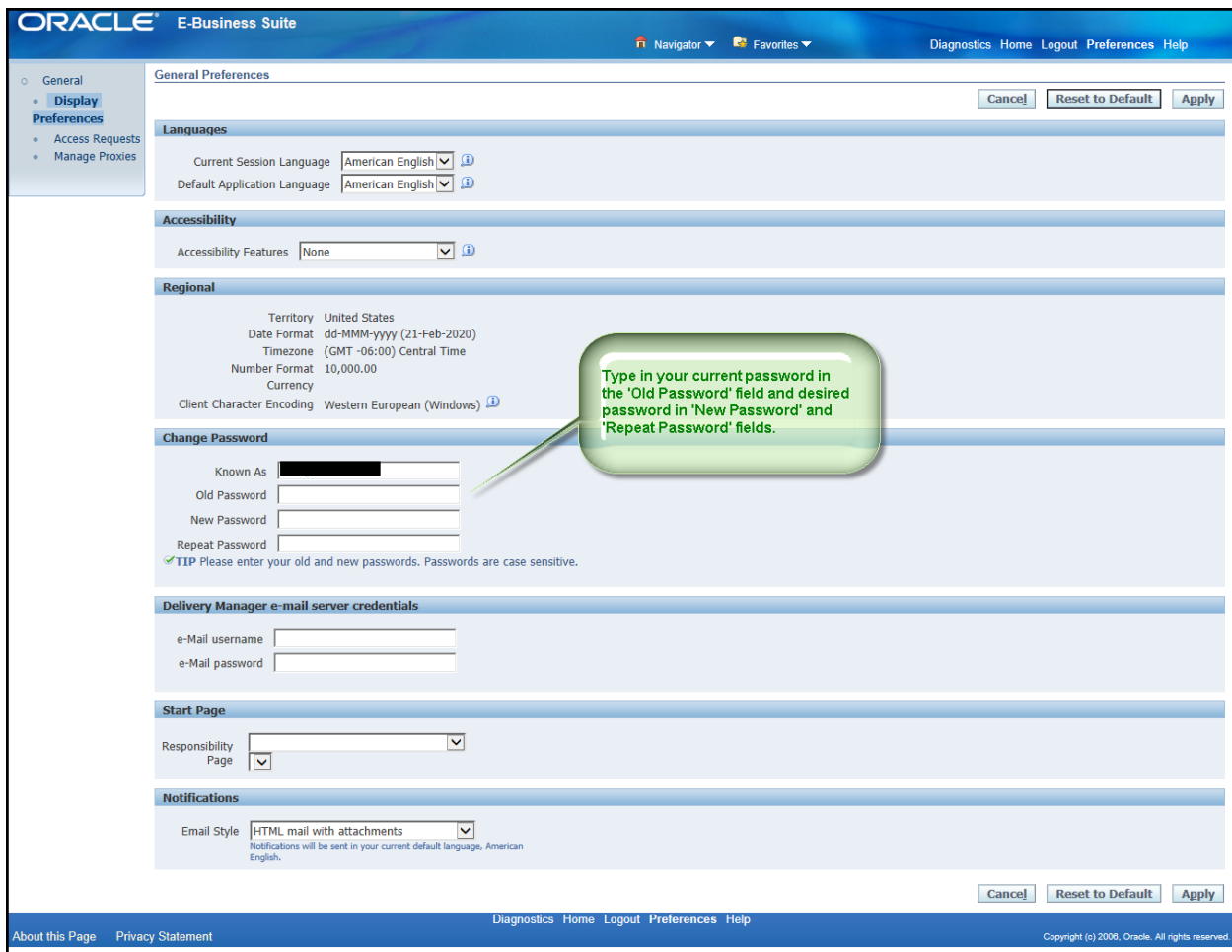
# CPS Supplier Portal Initial Logon and View Policy Acceptances

## Change Password

If you know your current password and would like to change it, follow the below instructions. While you logged in, visit the Preference link displayed at top left of the page.



The Change Password page will be displayed:







## CPS Supplier Portal Initial Logon and View Policy Acceptances


Step	Action
1.	Enter the user name in <b>E-Mail Address</b> field.
2.	Enter your CPS Vendor in the <b>CPS Vendor Number</b> field that was sent to you via email.
3.	Click on the <b>Reset</b> button.

Click on 'Apply' button to save the change of password.  
You will see an update message.

The screenshot shows the Oracle E-Business Suite interface. At the top, there is a navigation bar with 'Navigator', 'Favorites', 'Diagnostics', 'Home', 'Logout', 'Preferences', and 'Help'. On the left, a sidebar menu includes 'General', 'Display Preferences', and 'Access Requests'. The main content area displays a 'Confirmation' message with a green checkmark icon, stating: '1. Password is changed. 2. Updated'. Below this message is the 'General Preferences' section, which includes 'Languages' and 'Accessibility' sub-sections. The 'Languages' section has two dropdown menus: 'Current Session Language' and 'Default Application Language', both set to 'American English'. The 'Accessibility' section has a dropdown menu for 'Accessibility Features' set to 'None'. At the bottom right of the 'General Preferences' section, there are three buttons: 'Cancel', 'Reset to Default', and 'Apply'.



## CPS Supplier Portal Initial Logon and View Policy Acceptances

Step	Action
1.	Click the  sign to <b>expand</b> the 'CPS Supplier Portal (Supplier Access)' responsibility.
2.	Click the <b>View Acceptance Status</b> hyperlink.

**ORACLE** CPS Supplier Portal (Supplier Access) Navigator Favorites Diagnostics Home Logout Preferences

**Policy Acceptance Status**  
 ✓TIP Welcome to the Supplier Portal User Policies Acceptance Page.  
 Supplier Name : XYZ Corp Supplier Number : 887799 User Name : AAB@XYZ.COM


Acceptance Type	Acceptance Date	Start Date	End Date
Purchase Orders Terms and Conditions	28-Feb-2020 12:39:31	28-Feb-2020	
Indebtedness Policy	28-Feb-2020 12:39:26	28-Feb-2020	
Ethics Policy	28-Feb-2020 12:39:21	28-Feb-2020	
Disclaimer and Terms and Conditions	28-Feb-2020 12:39:16	28-Feb-2020	

View Policy

**Select Policy Name**

- Disclaimer and Terms and Conditions
- Ethics Policy
- Indebtedness Policy
- Purchase Orders Terms and Conditions

About this Page Privacy Statement Diagnostics Home Logout Preferences Copyright (c) 2006, Oracle. All rights reserved.

Step	Action
3.	Click the  link to return back to the home page.