



# RIFANS Supplier Portal User's Guide

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# RIFANS Supplier Portal User's Guide

## Introduction

The State of Rhode Island has upgraded its RIFANS Purchasing system by implementing a new RIFANS Supplier Portal. This User's Guide is intended to help suppliers understand and use this new on-line tool.

The RIFANS Supplier Portal is the internet interface by which suppliers can view their purchase orders, deliveries, invoices, and payment status. Suppliers can also maintain their account information such as address changes and maintain their contacts. This system also allows the State of Rhode Island to send suppliers electronic notification of bid opportunities for the commodity categories the suppliers have indicated on their supplier profiles.

The RIFANS Supplier Portal is a completely electronic interface. No special software, aside from an up-to-date web browser such as Microsoft's Internet Explorer, is required to access this system.

You must be logged on to the internet in order to access the RIFANS Supplier Portal. If you do not have internet access of your own, our site can be accessed using any public computer such as at your public library or one of the computers available in the Purchasing Department at the Department of Administration.

The following conventions are used in this Guide:

<b><u>Links</u></b>	Clicking a link will take you to another location or drill down to other information.
<b>[Buttons]</b>	Clicking a button will perform an operation.

# RIFANS Supplier Portal User's Guide

## Registering in the Portal

### *New Suppliers*

1. Before the State of Rhode Island can approve your supplier registration, your company must mail in the Supplier Registration Package found by going to <http://www.purchasing.ri.gov>. On the home page, look for Vendor Registration Information towards the bottom of the page. Click on the "complete supplier registration package" link. Click "download registration package" at the bottom of the screen.

- **Form W-9 Request for Taxpayer Identification Number and Certification** can also be found by going to <http://www.purchasing.ri.gov>>Vendor Information>General Information>Standard Forms>IRS W9.

Future changes to your business's profile will require approval by the State of Rhode Island.

# RIFANS Supplier Portal User's Guide

## Registering in the Portal

### *Existing Suppliers*

If you are already a supplier (previously filled out the Supplier Registration Package) with the State of Rhode Island, you will need to contact the Department of Accounts & Control at [Help\\_State\\_Portal@admin.ri.gov](mailto:Help_State_Portal@admin.ri.gov) or 401-222-1888, and they will send you a username and password to begin using the Supplier Portal.

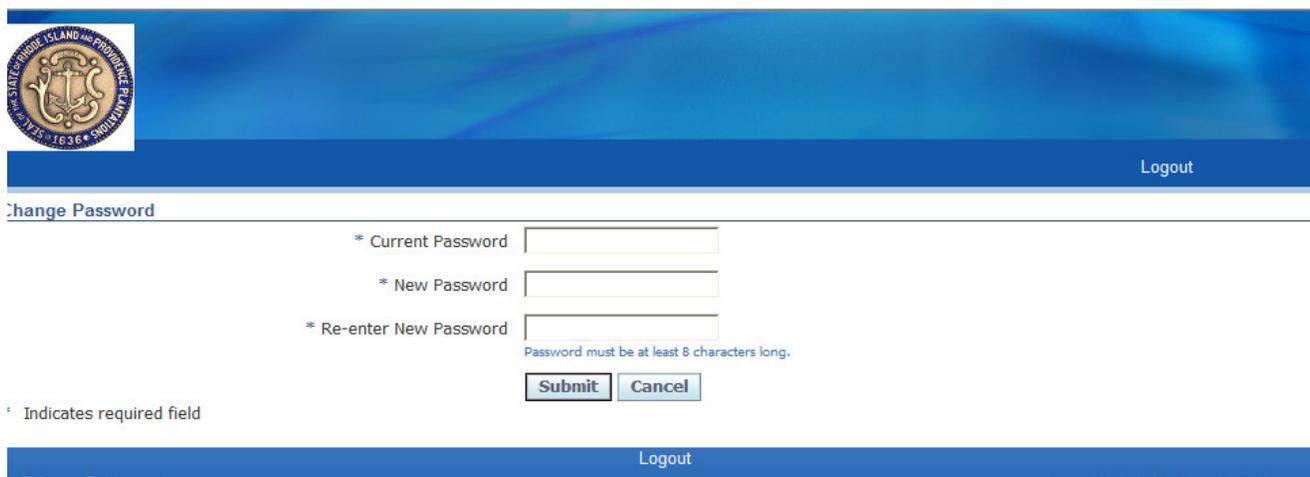
# RIFANS Supplier Portal User's Guide

## Password Maintenance

You will be required to change your password the first time you log in. The password requirements are:

- Password must be at least 8 characters long.
- Password must contain at least one letter and at least one number.
- Password cannot contain the username.
- Password cannot contain consecutively repeating characters.
- Password is case sensitive.

The password is set to expire every 90 days. The same password cannot be used for another 20 times once changed.



The screenshot shows the top navigation bar with the Rhode Island State Seal on the left and a "Logout" link on the right. Below the navigation bar is a "Change Password" section. It contains three required fields: "\* Current Password", "\* New Password", and "\* Re-enter New Password". A blue error message states "Password must be at least 8 characters long." Below the fields are "Submit" and "Cancel" buttons. A legend indicates that an asterisk (\*) denotes a required field. The bottom of the page features another "Logout" link.

To change the password, do the following:

1. Enter old password.
2. Enter new password.
3. Repeat new password entry.
4. Click **[Apply]** to save your changes.

**\*\*Important Note:** Your account will be locked after 4 failed tries to log in. If this happens, please email the RIFANS Supplier Portal Administrator at [Help\\_State\\_Portal@admin.ri.gov](mailto:Help_State_Portal@admin.ri.gov) to have your account unlocked.

# RIFANS Supplier Portal User's Guide

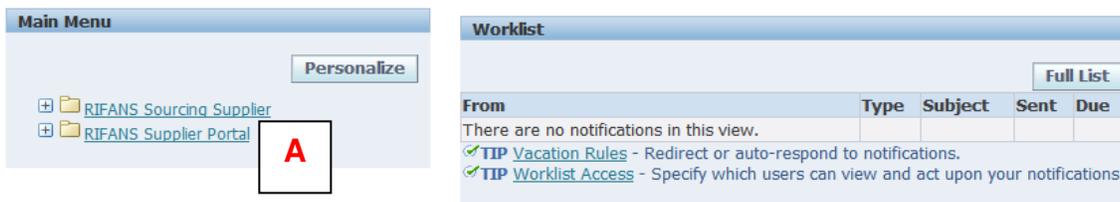
## How to Navigate

### Login

1. Click on the link provided in the registration email.
2. You may also gain access to the portal login page by typing <https://rifansportal.ri.gov> directly into your Internet Explorer or web browser address field.

The first time you log in, you will need the username and password that was sent to you by the State of Rhode Island in the email confirming your registration.

Oracle Applications Home Page



The screenshot shows the Oracle Applications Home Page. On the left, the 'Main Menu' section contains a 'Personalize' button and two links: 'RIFANS Sourcing Supplier' and 'RIFANS Supplier Portal'. A red box with the letter 'A' is placed over the 'RIFANS Supplier Portal' link. On the right, the 'Worklist' section has a 'Full List' button and a table with columns 'From', 'Type', 'Subject', 'Sent', and 'Due'. Below the table, it states 'There are no notifications in this view.' and lists two tips: 'TIP Vacation Rules - Redirect or auto-respond to notifications.' and 'TIP Worklist Access - Specify which users can view and act upon your notifications.'

Click **RIFANS Supplier Portal** link to open the Home Page A (Shown on next page)

# RIFANS Supplier Portal User's Guide

## [How to Navigate](#)

### [Portal Home Page](#)

The RIFANS Supplier Portal Home Page is the central repository for all supplier related data and functions. You can click on the information displayed on the Home Page to drill down to recent data and information related to Orders, Shipments, Receipts, and Payments. The percent sign (%) is used as the wildcard character in any search field within this application.

The screenshot shows the RIFANS Supplier Portal Home Page. At the top, there is a navigation bar with tabs for Home, Orders, Shipments, Admin, and Finance. A search bar is located below the navigation bar, with a dropdown menu set to 'PO Number' and a 'Go' button. A callout 'A' points to the 'Go' button. Below the search bar, there are four main sections: Notifications, Orders At A Glance, and two Quick Links sections (Orders, Receipts, Invoices, Payments). Callout 'B' points to the Notifications section header. Callout 'C' points to the Orders At A Glance section header. Callout 'D' points to the Orders Quick Links section. The Notifications section contains a table with columns for Subject and Date. The Orders At A Glance section contains a table with columns for PO Number, Description, and Order Date.

Subject	Date
<a href="#">You are invited: RFQ 7449273 (BOARD OF ELECTIONS - JANITORIAL SERVICES)</a>	03-Jan-2012 15:24:47
<a href="#">You are invited: RFQ 7449348 (GENERATOR MAINTENANCE SERVICE - CCR1)</a>	03-Jan-2012 10:12:26
<a href="#">Reminder: Please acknowledge intent to participate in RFQ 7449358 (IV ADMIXTURE SERVICES: ELEANOR SLATER HOSP. - CRANSTON UNIT AND ZAMBARANO UNIT)</a>	01-Jan-2012 09:47:20
<a href="#">Reminder: Please acknowledge intent to participate in RFQ 7449349 (2.5 CUBIC YARD ELECTRIC SANDER FOR TRUCK - DEM)</a>	31-Dec-2011 10:49:36
<a href="#">Reminder: Please acknowledge intent to participate in RFQ 7449351 (Restoration of the Eisenhower House, Newport, RI)</a>	26-Dec-2011 15:28:46

PO Number	Description	Order Date
<a href="#">3259189</a>	ARRA - 0042 - WEATHERIZATION OF DWELLING UNITS USING DELIVERABLE FUELS (FY/11)	13-Dec-2011 09:55:48

### **Quick Search at Top of Page**

A

Use this field to directly view a specific purchase order, invoice, receipt or payment.

### **Notifications**

B

Notifications are messages waiting for your review. Some notifications are view-only, while other notifications require action. To view your notifications, click the linked subject to open the Notification Details Page. To see the complete list, click on the **[Full List]** button for each section.

### **At A Glance**

C

This section lists the most recent items for each of those categories.

### **Quick Links**

D

Use the Quick Links in the box at the right of the screen to link directly to desired functions.

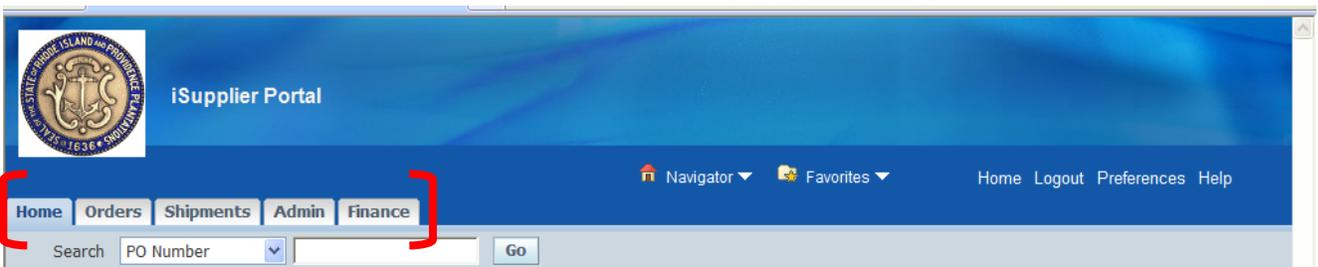
# RIFANS Supplier Portal User's Guide

## How to Navigate

### *Using RIFANS Supplier Portal Tabs*

The RIFANS Supplier Portal tabs are available on every screen and help you navigate to the various data screens. The relevant information from each tab is explained in detail later in this Guide.

- **Home:** Takes you back to the Home Page.
- **Orders:** Takes you to your POs and agreements.
- **Shipments:** View a summary of your receipts.
- **Admin:** Update your supplier and contact information. (\*\*This tab is very important and should be setup first.)
- **Finance:** Enter invoices and credit memos and view the status of invoices and payments.



# RIFANS Supplier Portal User's Guide

## Admin Tab

### General

The screenshot shows the RIFANS Supplier Portal interface. At the top left is the State of Rhode Island logo. The main header is "iSupplier Portal". Below the header is a navigation bar with tabs: Home, Orders, Shipments, **Admin** (highlighted with a red box), and Finance. To the right of the navigation bar are links for Navigator, Favorites, Home, Logout, and Preferences. The main content area is titled "Profile Management" and contains a sidebar with a tree view of options: General, Company Profile, Organization, Address Book, Contact Directory, Business Classifications, Product & Services, and Surveys. The "General" section is active, displaying fields for Organization Name (NARR ELECTRIC CO/NATIONAL), Supplier Number (1056), DUNS Number (GRID), Tax Registration Number, Taxpayer ID (597), and Country of Tax Registration. Below this is the "Attachments" section, which is highlighted with a red box labeled "A". It includes a search box with a "Go" button and a link to "Show More Search Options". Below the search box is the "Add Attachment..." button, highlighted with a red box labeled "B". At the bottom is a table with columns: Title, Type, Description, Category, Last Updated, Usage, Update, Delete, and Publish to Catalog. The table contains one row with the following data: Title: Undefined, Type: Short Text, Description: (empty), Category: Miscellaneous, Last Updated: 12-Nov-2009, Usage: One-Time, Update: (pencil icon), Delete: (trash icon), Publish to Catalog: (document icon).

**A**

### Attachments

This page is used to upload documents pertinent to your business with the State of Rhode Island, such as the W-9 Form, price lists, a link to your website, etc. Both the Supplier Administrator and suppliers can attach documents, spreadsheets, pdfs, diagrams, internet links (URL), or text notes in this section.

**B**

Click on the **[Add Attachment]** Button to open the Add Attachment Page.

# RIFANS Supplier Portal User's Guide

## Admin Tab

### *Add Attachment*

Home | Orders | Shipments | Admin | Finance

Profile Management

Add Attachment

Cancel | Add Another | Apply

Add Desktop File/ Text/ URL

**E**

**C**

Title

Description

Category From Supplier

**D**

Type  File  URL  Text

Browse...

- C** Enter a Description of the type of attachment being added, i.e. Company Website, Price List, etc. **Please use all caps when typing in the portal.**
- D** Select the type of attachment being added. For a file (Word document, spreadsheet, PDF, etc), click on the **[Browse]** Button to select the file being attached. To attach a link, key the web address for the site in the URL field. To type the information into the form directly, select Text and key the information in the Text Box.
- E** When finished, click the **[Apply]** Button, or if you have another attachment to add, click on the **[Add Another]** Button.

# RIFANS Supplier Portal User's Guide

## Admin Tab

### Organization

The screenshot shows a web browser window displaying the 'iSupplier Portal' interface. The browser's address bar shows 'Organization'. The page header includes the portal logo and navigation links: 'Home', 'Orders', 'Shipments', 'Admin', and 'Finance'. The 'Admin' tab is selected, leading to the 'Profile Management' section. On the left, a sidebar lists various profile management options, with 'Organization' highlighted. The main content area is titled 'Organization' and contains several input fields: 'D-U-N-S Number', 'Legal Structure', 'Principal Name', 'Year Established', 'Incorporation Year', 'Control Year', 'Mission Statement', 'Chief Executive Name', 'Chief Executive Title', and 'Principal Title'. There are 'Cancel' and 'Save' buttons at the top right of the form. A red box with the letter 'A' is placed over the 'Save' button. Below the main form is a 'Total Employees' section with fields for 'Organization Total', 'Corporate Total', and their respective 'Total Type' dropdown menus. The bottom of the page shows the start of a 'Tax and Financial Information' section.

Fill in any field. When finished, click the **[Save]** Button. **A** Nothing on this screen is mandatory.

# RIFANS Supplier Portal User's Guide

## [Admin Tab](#)

### [Address Book](#)

Address Name	Address Details	Country	Update	Remove
01	280 MELROSE ST PROVIDENCE, RI 02901	United States		
02	CUSTOMER SERVICE DEPT STATE OF RI ACCOUNTS 55 BEARFOOT RD NORTHBOROUGH, MA 01532	United States	A	
03	PROCESSING CTR	United States		

To change your company address, do the following:

1. Review your company address information by clicking on the **[Address Book](#)** link.
2. If needed, click on the **Update** icon. 

Admin: Profile Management: Address Book >

### Update Address

\* Indicates required field

**TIP** PLEASE ENTER ALL INFORMATION IN CAPITAL LETTERS. THANK YOU.  
 **TIP** PLEASE NOTE: If you are making a change to your primary site (01), you must submit an updated W-9 form as your primary site and your W-9 form must be submitted in order for your invoices and payments to be processed.

**NARR ELECTRIC** Supplier Number **1056**  
**CO/NATIONAL GRID**

\* Address Name  Phone Area Code   
Country  Phone Number   
\* Address Line 1  Fax Area Code   
Address Line 2  Fax Number   
Address Line 3  B  
Address Line 4   
\* City/Town/Locality  Email Address   
County   
State/Region   Purchasing Address  
Province   Payment Address  
\* Postal Code   RFQ Only Address

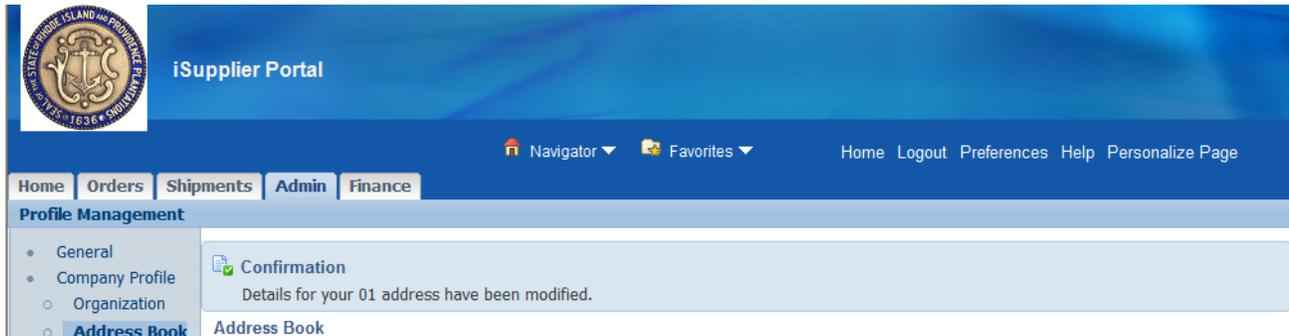
3. Make applicable edits. 
4. Click [**Save**]. 

# RIFANS Supplier Portal User's Guide

## Admin Tab

### *Address Book*

5. Receive confirmation that your address has been changed.



The screenshot displays the RIFANS Supplier Portal interface. At the top left is the seal of the State of Rhode Island and Providence Plantings. The page title is "iSupplier Portal". A navigation bar includes "Navigator" and "Favorites" with dropdown arrows, and links for "Home", "Logout", "Preferences", "Help", and "Personalize Page". Below this is a secondary navigation bar with tabs for "Home", "Orders", "Shipments", "Admin", and "Finance". The "Admin" tab is active, showing a "Profile Management" section with a tree view containing "General", "Company Profile", "Organization", and "Address Book". The "Address Book" item is selected. A confirmation message is displayed in a light blue box: "Confirmation Details for your 01 address have been modified."

# RIFANS Supplier Portal User's Guide

## Admin Tab

### Contact Directory

View your contact information and make updates if needed.

Home | Orders | Shipments | Admin | Finance

Profile Management

- General
- Company Profile
  - Organization
  - Address Book
  - Contact Directory**
  - Business Classifications
  - Product & Services
  - Surveys

Confirmation  
H has been removed from your Contact Directory.

Contact Directory : Active Contacts

Create

First Name	Last Name	Phone Number	Email	Status	User Account	Remove	Addresses	Update
Rachel	Henschel	222-222-2222	ACCTCONTROL@DOA.RI.GOV	Current	✓			
RACHEL	HENSCHEL	781 907-1555		Current				
PHILLIPPE	MONTILLER			Current				
KATE	RINGE-WELCH	401 784-7161		Current				

Contact Directory : Inactive Contacts

**A**

To change your contact information, do the following:

1. Review your contact information by clicking on the **Contact Directory** link.
2. If the contact has a user account, it will be reflected here. If you need to add or delete a user, contact the Department of Accounts & Control at [Help\\_State\\_Portal@admin.ri.gov](mailto:Help_State_Portal@admin.ri.gov) or 401-222-1888.
3. If needed click on the **Update** icon. **A**

Admin: Profile Management: Contact Directory > Contact Directory : Active Contacts >

Update Contact

\* Indicates required field

Contact Title

First Name

Middle Name

\* Last Name

Job Title

Department

Contact Email

Phone Area Code

Phone Number

Phone Extension

Fax Area Code

Fax Number

**B**

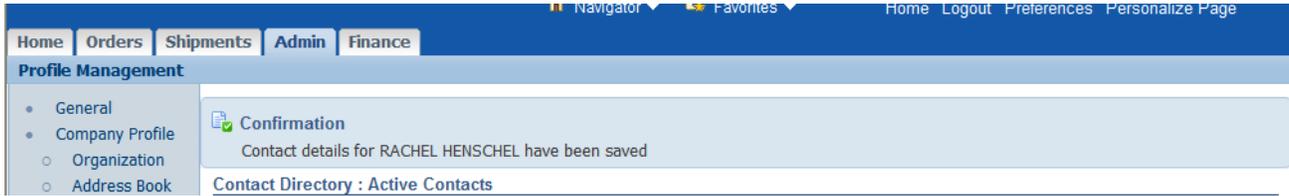
4. Make applicable edits.
5. Click **[Save]**. **B**

# RIFANS Supplier Portal User's Guide

## Admin Tab

### *Contact Directory*

6. Receive confirmation that your contact information has been changed.



# RIFANS Supplier Portal User's Guide

## Admin Tab

### **Business Classifications**

This section displays the supplier's business classification information. The State of Rhode Island certifies businesses for Minority Business Enterprises (MBE), Women Business Enterprise (WBE), and/or Disadvantaged Business Enterprise (DBE) programs. To obtain certification information, please contact the State of Rhode Island MBE Administrator for details and certification forms or go to [www.mbe.ri.gov](http://www.mbe.ri.gov). Identify the classifications that apply to your company.

To add or update your Business Classification, do the following:

Home Orders Shipments Admin Finance

Profile Management

- General
- Company Profile
  - Organization
  - Address Book
  - Contact
- Directory
  - Business Classifications
  - Product & Services
  - Surveys

Business Classifications

Cancel Save

**Certification**

✓ TIP To qualify as a Minority Owned Business, a business is at least 51% owned and controlled by one or more minorities/women. The State of Rhode Island certifies businesses for the above Minority Business Enterprises (MBE), Women Business Enterprise (WBE), and/or Disadvantaged Business Enterprise (DBE) programs. To obtain certification information, please contact the State of Rhode Island MBE Administrator for details and certification forms or go to [www.mbe.ri.gov](http://www.mbe.ri.gov).

I certify that I have reviewed the classification below and they are current and accurate.  
Last Certified **22-Jul-2011** By **Rachel Henschel**

✓ TIP Date format example: 17-Apr-2012

Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
Construction and Engineering to DOT	<input type="checkbox"/>				
Disabled Owned Business Enterprise	<input type="checkbox"/>				
Hub Zone	<input type="checkbox"/>	A			
Minority Business Enterprise-Asian	<input type="checkbox"/>				
Minority Business Enterprise-Black	<input type="checkbox"/>				
Minority Business Enterprise-Hispanic	<input type="checkbox"/>				

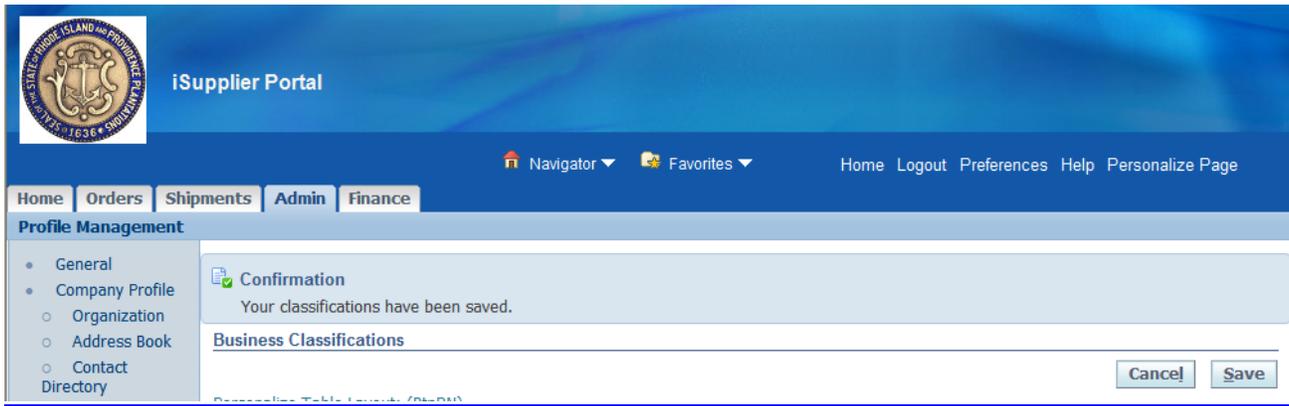
1. Click on the **Business Classifications** link.
2. Check the Applicable Box after the Classification that applies to your business. Complete all applicable fields. A
3. Click **[Save]**. B

# RIFANS Supplier Portal User's Guide

## Admin Tab

### *Business Classifications*

4. Receive a confirmation message.



The screenshot displays the RIFANS Supplier Portal interface. At the top left is the logo for the State of Rhode Island and Providence Plantings, featuring a shield with a ship and the text "STATE OF RHODE ISLAND AND PROVIDENCE PLANTINGS 1636". To the right of the logo is the text "iSupplier Portal". Below the logo and text is a navigation bar with "Navigator" and "Favorites" dropdown menus, and links for "Home", "Logout", "Preferences", "Help", and "Personalize Page". Below the navigation bar is a menu with "Home", "Orders", "Shipments", "Admin", and "Finance". The "Admin" tab is selected, and the "Profile Management" section is active. On the left side of the "Profile Management" section is a list of options: "General", "Company Profile", "Organization", "Address Book", "Contact", and "Directory". The "Confirmation" message is displayed in the main content area, stating "Your classifications have been saved." Below the message is the "Business Classifications" section, which is currently empty. At the bottom right of the "Business Classifications" section are "Cancel" and "Save" buttons.

# RIFANS Supplier Portal User's Guide

## Admin Tab

### *Product and Services*

This section displays the supplier's commodity codes that are registered in the RIFANS Supplier Portal. By registering the commodity codes for the goods and services your business provides, your company will be electronically notified when the State of Rhode Island is in need of those products or services; and you will have an opportunity to submit a bid or proposal as required.

The screenshot shows the 'Admin' tab in the RIFANS Supplier Portal. Under 'Profile Management', the 'Product & Services' link is selected. A tip explains the importance of commodity code additions. Below the tip, there are 'Remove' and 'Add' buttons. The 'Add' button is highlighted with a red box labeled 'A'. Below the buttons is a table with columns: 'Select Code', 'Products and Services', 'Date Added', 'Approval Status', and 'View Sub-Category'. The first row shows code '990' for 'SECURITY, FIRE, SAFETY, AND EMERGENCY SERVICES' with a date of '24-May-2011' and an 'Approved' status.

To add your company's products and services, do the following:

1. Click on the **Product and Services** link.
2. Click **[Add]** to add and view sub-categories.



The screenshot shows the 'Add Products and Services' dialog box. It has a breadcrumb trail 'Admin: Profile Management: Product & Services >' and a title 'Add Products and Services: : (NARR ELECTRIC CO/NATIONAL GRID)'. There are 'Cancel' and 'Apply' buttons. Two radio buttons are present: 'Browse All Products & Services' (selected) and 'Search for Specific Product & Service'. The 'Browse All Products & Services' radio button is highlighted with a red box labeled 'B'. Below the radio buttons is a table with columns: 'Code', 'Products and Services', 'View Sub-Categories', and 'Applicable'. The table lists various commodity codes and their descriptions. The 'Apply' button is highlighted with a red box labeled 'C'.

3. Find the Commodity Code(s) that relate to your business:

To Browse the Full List:

1. Select **Browse All Products and Services**.
2. Click on the **Next 10** Link to see additional pages.



# RIFANS Supplier Portal User's Guide

## Admin Tab

### *Product and Services*

Admin: Profile Management: Product & Services >  
Add Products and Services: : (NARR ELECTRIC CO/NATIONAL GRID)

Browse All Products & Services D

Search for Specific Product & Service

**Search**

Please enter your search criteria and select the "Go" button to see the results. Note that the search is not case sensitive.

Code

Description  E

Code	Description	Applicable
No search conducted.		

F

To Look for a Specific Commodity Code:

1. Select **Search for Specific Product & Service.** D
2. Enter the name of the service or product. You can also enter a partial name of the service or product using the % wildcard character (i.e. **%APPLIANCES%**). E
3. Click **[Go]** and review the results. F

Description

Previous 1-10 Next 10

Code	Description	Applicable
045	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE	<input type="checkbox"/>
045.22G2	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE.APA:DOE - Cookware and Bakeware, Household (Not otherwise listed)	<input type="checkbox"/> <span style="border: 1px solid black; padding: 2px;">G</span>
045.92H6	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE.APA:URI - Washers and Dryers, Coin-Operated Type	<input type="checkbox"/>
045.00	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE.APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE	<input type="checkbox"/>
045.06	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE.Appliances, Small, Electric (Not Otherwise Classified)	<input type="checkbox"/>
045.12	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE.Appliances, Small, Non-Electric (Not Otherwise Classified)	<input type="checkbox"/>
045.14	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE.Blenders, Household	<input type="checkbox"/>
045.15	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE.Bread Makers	<input type="checkbox"/>
045.17	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE.Can Openers, Household	<input type="checkbox"/>
045.18	APPLIANCES AND EQUIPMENT, HOUSEHOLD TYPE.Cleaners and Sweepers, Hand-Operated	<input type="checkbox"/>

Previous 1-10 Next 10 H

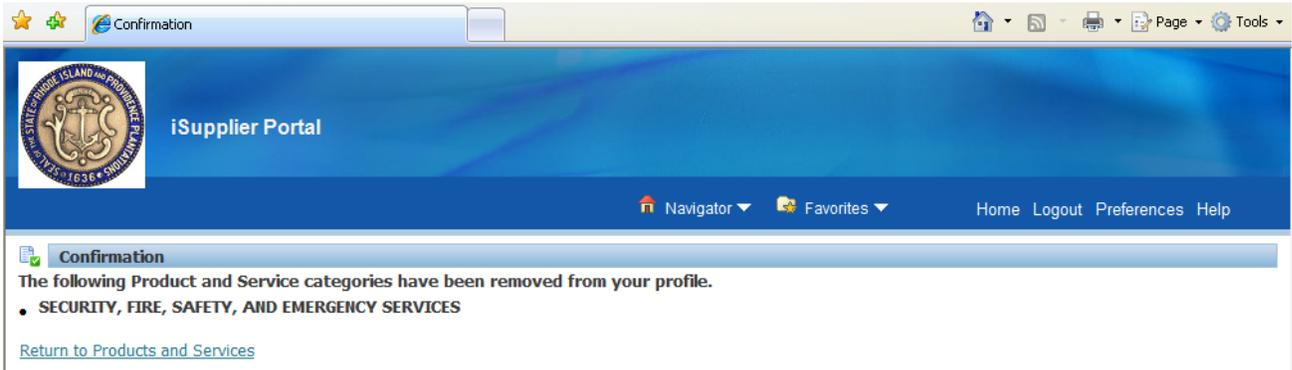
4. Select the proper service or product by clicking on the **Applicable** box for all items that you want to add. Choose the main code (codes ending in .00) rather than the sub-category code. G
5. Click **[Apply]**. H

# RIFANS Supplier Portal User's Guide

## Admin Tab

### *Product and Services*

6. You will receive a confirmation message that the service or product has been added to your profile.



# RIFANS Supplier Portal User's Guide

## Admin Tab

### Surveys

This section would show any surveys the State of Rhode Island would conduct with suppliers.

The screenshot shows a web browser window displaying the RIFANS Supplier Portal. The browser's address bar shows "Surveys". The page header includes the Rhode Island state seal and the text "iSupplier Portal". Navigation links include "Home", "Orders", "Shipments", "Admin", and "Finance". The "Admin" tab is selected, and the "Surveys" sub-tab is active. The main content area displays a table with the title "Update NARR ELECTRIC CO/NATIONAL GRID - 1056: Surveys". The table has three columns: "Subject", "Last Update By", and "Last Update Date". The content of the table is "No results found."

Subject	Last Update By	Last Update Date
No results found.		

# RIFANS Supplier Portal User's Guide

## Orders Tab

This section displays the most recent purchase orders the State of Rhode Island has issued to your company. Automatic retrieval of the most recent 25 purchase orders, in summary form, is shown if they exist.

The screenshot shows the 'iSupplier Portal' interface. The 'Orders' tab is selected in the navigation bar. Below the navigation bar, there is a search bar and an 'Export' button (labeled A). A 'Views' section contains a dropdown menu set to 'All Purchase Orders' and a 'Go' button (labeled B). Below this is a table of purchase orders. The first row of the table has a 'Purchase Order Number' link (labeled C) for the value 3272418.

PO Select	PO Number	Operating Rev Unit	Document Type	Description	Order Date	Currency	Amount	Status	By	Acknowledge	Attachments
<input type="radio"/>	<a href="#">3272418</a>	0	Standard PO	DOT; FY12 U2003-CB-032NEC/REHAB CONSTRUCTION	30-Mar-2012 08:20:40	USD	32,707.67	Open			
<input type="radio"/>	<a href="#">3272334</a>	0	Standard PO	DOT; FY12 U2003-CB-032NEC CONSTRUCTION	29-Mar-2012 12:42:01	USD	34,123.00	Open			
<input type="radio"/>	<a href="#">3272224</a>	0	Standard PO	DOT; FY12 U2003CB029; MAPLEVILLE BRIDGE #337	29-Mar-2012 08:36:16	USD	15,067.77	Open			
<input type="radio"/>	<a href="#">3271313</a>	1	Standard PO	DOT; FY12 U93130NEC; PAWTUCKET BRIDGE #550	27-Mar-2012 09:11:44	USD	0.00	Closed			

To export the list into an Excel spreadsheet, click on the **[Export]** Button. **A**

Open drop-down window to select from other pre-defined views of purchase order data. Select **"All Purchase Orders"** from list and click **[Go]**. **B**

Click on the **Purchase Order Number** link to drill down to order detail from this window. **C**

# RIFANS Supplier Portal User's Guide

## Orders Tab

### Purchase Order Detail

Home | Orders | Shipments | Admin | Finance

**Purchase Orders** | Agreements

Orders: Purchase Orders >

Standard Purchase Order: 3259189, 0 (Total USD 1,250,293.37)

Currency=USD

Actions View PDF Go Export

#### Order Information

<b>General</b>	<b>Terms and Conditions</b>	<b>Summary</b>
Total <b>1,250,293.37</b>	Payment Terms <b>NET 30</b>	Total <b>1,250,293.37</b>
Supplier <b>NARR ELECTRIC CO/NATIONAL GRID</b>	Carrier	Received <b>1,122,669.38</b>
Supplier Site <b>99</b>	FOB <b>Destination</b>	Invoiced <b>1,122,670.38</b>
Address <b>280 MELROSE ST PROVIDENCE, RI 02901</b>	Freight Terms <b>Paid</b>	Payment Status <b>Partially Paid</b>
Order Date <b>13-Dec-2011 09:55:48</b>	Shipping Control	
Description <b>ARRA SP-0042 - WEATHERIZATION OF DWELLING UNITS USING DELIVERABLE FUELS (FY/11)</b>	<b>Ship-To Address</b>	
	Address <b>DOA-CS STATE ENERGY OFFICE ONE CAPITOL HILL, 2ND FLOOR SMITH ST PROVIDENCE, RI 02908</b>	
Status <b>Open</b>	<b>Bill-To Address</b>	
Note to Supplier	Address <b>DOA CONTROLLER ONE CAPITOL HILL, 4TH FLOOR SMITH ST PROVIDENCE, RI 02908</b>	
Operating Unit <b>State of Rhode Island</b>		
Sourcing Document		
Supplier Order Number		
Attachments <b>None</b>		

#### PO Details

Show All Details | Hide All Details

Details	Line	Type	Item/Job Item	Supplier	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
Show	1	Goods			ARRA - WEATHERIZATION OF DWELLING UNITS USING DELIVERABLE FUELS (FY/11)	Each	1250293.37	1	1,250,293.37	Open		

Returners: Purchase Orders

Actions View PDF Go Export

- Review purchase order detail – shows total amount and what has been received and invoiced against it. **A**

- Scroll down screen to review detail PO information, and use the **Show** link to access and show shipment detail information (see next page). **B**

# RIFANS Supplier Portal User's Guide

## Orders Tab

### Purchase Order Detail

DELIVERABLE FUELS (FY/11)		SMITH ST PROVIDENCE, RI 02908	
Status	Open	<b>Bill-To Address</b>	
Note to Supplier		Address	
Operating Unit	State of Rhode Island	DOA CONTROLLER	
Sourcing Document		ONE CAPITOL HILL, 4TH FLOOR	
Supplier Order Number		SMITH ST	
Attachments	None	PROVIDENCE, RI 02908	

PO Details												
<a href="#">Show All Details</a>   <a href="#">Hide All Details</a>												
Details Line ^	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status			
1	Goods			USING DELIVERABLE FUELS (FY/11)		1,250,293.37	1	1,250,293.37	Open			

Shipments												
Shipment	Ship-To Location	Qty			Amount			Promised Date	Need-By Date	Payment Status	Supplier	
		Ordered	Received	Invoiced	Ordered	Received	Invoiced				Status	Line
1	<a href="#">06800-026</a>	1250293.37	1122669.38	1122670.38	1,250,293.37	<a href="#">1,122,669.38</a>	<a href="#">1,122,670.38</a>		05-Dec-2011 09:26:53	Partially Paid	Open	

[Return to Orders: Purchase Orders](#)      Actions:

# RIFANS Supplier Portal User's Guide

## Orders Tab

### Agreements

Purchase Orders | **Agreements**

Supplier Agreements Export

**Simple Search**

Note that the search is case insensitive Advanced Search

PO Number  **A**

Global

Effective-From Date

Effective-To Date

**B**

Previous 1-25 Next 25

PO Number	Revision	Global	Description	Order Date	Currency	Effective-From Date	Effective-To Date	Status	Attachments	Upload
<a href="#">3270456</a>	0	No	DEL-10822; DOT; FY 12; U2011CB096NEC	15-Mar-2012 14:42:29	USD	15-Nov-2010	14-Nov-2015			
<a href="#">3265857</a>	0	No	ARRA - SP0042 GR-10926 STATE ENERGY CONSERVATION CODE COMPLIANCE BASELINE STUDY - TOTAL AMOUNT \$150,000	06-Feb-2012 14:58:45	USD	01-Feb-2012	30-Apr-2012			
<b>C</b>	1	No	DEL-10712 DOT; U2011CB083NEC	07-Dec-2011 19:24:06	USD	24-Oct-2011	23-Oct-2016			
	1	No	DEL-10578 U2011CB090NEC. CONST. PORTION	19-Oct-2011 16:24:24	USD	26-Sep-2011	25-Sep-2016			

- Use the **Agreements** section on the Orders Page to access agreement information. Enter Agreement (PO) number. **A** The other fields do not have to be filled in.
- Click **[Go]** to retrieve record. **B**
- Note the summary information related to agreement listed. To view detail, click on the **Agreement** (PO Number) link. **C**

# RIFANS Supplier Portal User's Guide

## Shipments Tab

Utilize the Shipments Page to access all receipt information. Under receipts, users can view items received by the State of Rhode Island. Both simple and advanced searches can be performed for receipt transactions.

Home Orders **Shipments** Admin Finance

Receipts

View Receipts Export

IF YOU HAVE QUESTIONS REGARDING THE RECEIPT INFORMATION BELOW, PLEASE CONTACT THE INDIVIDUAL NAMED ON THE RELATED PURCHASE ORDER. THANK YOU.

Simple Search Advanced Search

Receipt Number  Organization

PO Number  (example : 1234) Item Number

Release Number  (example : 1234-2) Supplier Item

Shipment Number  Item Description

Shipped Date  (example: 18-Apr-2012)

Receipt	Creation Date	Organization	Shipment	Shipped Date	Packing Slip	Containers	Waybill/ Airbill	Freight Carrier	Bill of Lading	PO Number	Invoice Attachments	PO Number	Release Number
<a href="#">39771</a>	17-Jul-2008 13:06:40	Executive Branch								<a href="#">3091887</a>		3091887	
<a href="#">3259189</a>	23-Mar-2012	Executive Branch								<a href="#">3259189</a>		3259189	

• Enter search criteria. Use **[Advanced Search]** for additional query fields. **A** All fields do not have to be filled in.

• Click **[Go]** to execute search. **B**

• To view detail, click on the **Receipt Number** link. **C**

# RIFANS Supplier Portal User's Guide

## Finance Tab

### Summary

This page is where saved invoices and credit memos can be retrieved and worked on. It is also where invoices and credit memos are created and where invoices and payments are displayed. Please note: DOT invoices and credit memos may NOT be entered through the RIFANS Supplier Portal. Please submit invoices to RIDOT, 2 Capitol Hill, Providence, RI 02908.

Invoices and credit memos entered into the RIFANS Supplier Portal are electronically submitted to Accounts Payable and follow the same processing and approval steps as those entered manually. An invoice must be entered against an open purchase order.

### Update Saved Invoices

The screenshot shows the 'Finance' tab in the RIFANS Supplier Portal. The 'Create Invoices' button is highlighted with a red box. Below it, the search area includes fields for Supplier (NARR ELECTRIC CO/NATIONAL GRID), Invoice Number (DJO-test4-10), Invoice Date From, Invoice Date To, Invoice Status, Purchase Order Number, Invoice Amount, Invoice Date To, and Currency. A 'Go' button is next to the search fields. Below the search area is a table with columns: Invoice #, Invoice Date, Invoice Currency Code, Invoice Amount, Purchase Order, Status, Withdraw, Cancel, Update, and View Attachments. The first row shows an invoice with ID DJO-test4-10, dated 10-Apr-2012, in USD, with an amount of 1.00 and purchase order 3259189, with a status of 'In Process'. The 'Update' icon in the first row is highlighted with a red box. The 'Go' button at the bottom right is also highlighted with a red box.

To find a saved invoice, input the invoice number.

A

Or click on the **[Go]** Button to see all saved invoices.

B

Click on the **Update** Icon to complete and submit the invoice.

C

Invoices created in the RIFANS Supplier Portal are automatically uploaded to RIFANS on a periodic basis. Invoices will not be visible in the View Invoices Page until the upload process is complete. If an invoice fails validation or is rejected, it will not be visible in the Portal. You will be contacted by a member of the Accounts & Control team if an invoice cannot be processed. If you have any invoicing questions, please contact Accounts & Control at [Help State Portal@admin.ri.gov](mailto:Help State Portal@admin.ri.gov).

# RIFANS Supplier Portal User's Guide

## Finance Tab

### Create Invoices

Home | Orders | Shipments | Admin | **Finance**

Create Invoices | View Invoices | View Payments

Invoice Actions

Create Invoice With a PO **Go**

**Search**

Note that the search is case insensitive

Supplier **NARR ELECTRIC CO/NATIONAL GRID**

Invoice Number

Invoice Date From  (example: 18-Apr-2012)

Invoice Status

Purchase Order Number

Invoice Amount

Invoice Date To

Currency

**Go** **Clear**

Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Purchase Order	Status	Withdraw	Cancel	Update	View Attachments
No search conducted.									

Look for Create Invoice With a PO. Click the **[Go]** Button.

Home | Orders | Shipments | Admin | Finance

Create Invoices | View Invoices | View Payments

Purchase Orders | Details | Manage Tax | Review and Submit

Create Invoice: Purchase Orders

**Cancel** Step 1 of 4 **Next**

PLEASE NOTE: Department of Transportation Invoices may NOT be entered in this portal. Please submit invoices to RIDOT, 2 Capitol Hill, Providence, RI 02908.

**Search**

Note that the search is case insensitive

Purchase Order Number

Purchase Order Date

**Go** **Clear**

Select Items: **Add** **Remove**

Select All | Select None **Add to Invoice**

Select PO Number	Line	Shipment	Item Description	Supplier Item Number	Ordered	Received	Invoiced	UOM	Price	Curr	Ship To	Organization	Packing Slip	Waybill
------------------	------	----------	------------------	----------------------	---------	----------	----------	-----	-------	------	---------	--------------	--------------	---------

Input the purchase order number or purchase order date.

Click **[Go]**.

# RIFANS Supplier Portal User's Guide

## Finance Tab

### Create Invoices

Search

Note that the search is case insensitive Advanced Search

Purchase Order Number

Purchase Order Date  (example: 18-Apr-2012)

Select Items:

[Select All](#) | [Select None](#)

Select	PO Number	Line	Shipment	Item Description	Supplier Item Number	Ordered	Received	Invoiced	UOM	Unit Price	Curr	Ship To	Organization	Packing Slip	Waybill
<input checked="" type="checkbox"/>	<a href="#">3069703FY12</a>	1	1	ADDITIONAL SERVICE INSTALLATION POLE 6064 WR #3748169		1931.88	0	0	Each	1	USD	07400-036	State of Rhode Island		

Step 1 of 4

Select the purchase order and or purchase order line(s) to be invoiced by clicking the **Select** Box (this must be checked) at the beginning of the line next to the PO Number link. If there is only one line, you can select it and click **[Next]**.

D

You may select more than one line as long as all lines are on the same purchase order. If you have selected by purchase order number, then you can click on the **Select All** link to invoice for all lines on that purchase order. Each invoice can only have one purchase order number. Once you have identified all of the lines to be included, click on the **[Add Items to Invoice List]** Button.

Select Items:  E

[Select All](#) | [Select None](#)

Select	PO Number	Line	Shipment	Advances or Financing	Item Description	Supplier Item Number	Ordered	Received	Invoiced	UOM	Unit Price	Curr	Ship To	Organization	Packing Slip	Waybill
<input checked="" type="checkbox"/>	<a href="#">3130031-151</a>	3.3	1	<input type="checkbox"/>	MPA-41 7/1/11-1/15/12 ELECTRICIAN STRAIGHT TIME		52	0	0	Hour	69	USD	01400-026	State of Rhode Island		
<input type="checkbox"/>	<a href="#">3130031-151</a>	61.3	3	<input type="checkbox"/>	MPA-41 7/1/11-1/15/12 MATERIALS ARE TO BE PROVIDED AT COST PLUS THE FOLLOWING (APPLICABLE) FEE FOR OVERHEAD, PICKUP AND DELIVERY. NO ADDITIONAL CHARGES WILL BE ACCEPTABLE.		3408	0	0	Total	1	USD	01400-026	State of Rhode Island		
<input checked="" type="checkbox"/>	<a href="#">3130031-151</a>	40.3	2	<input type="checkbox"/>	MPA-41 7/1/11-1/15/12 BUCKET TRUCK RENTAL CHARGES		1	0	0	Day	400	USD	01400-026	State of Rhode Island		

Step 1 of 4

Click on the **[Next]** Button to continue.

F

# RIFANS Supplier Portal User's Guide

## Finance Tab

### Create Invoices

**G** Enter your invoice number. The system will reject duplicate invoice numbers, so this number must be unique each time.

Enter the invoice date. It can be a previous date. **H**

Be sure the invoice type drop down is correct. **I** This is where the credit memo can be chosen.

Enter a description for your invoice. **J**

Attach any required back-up documentation for your invoice such as delivery confirmation, time sheets, progress payment documentation, etc.

Review the Quantity to Invoice. **L** You can enter an amount equal to or less than the Available Quantity. All other information will default from the purchase order. **K**

Click on the **[Next]** Button to proceed. **M**

# RIFANS Supplier Portal User's Guide

## Finance Tab

### Create Invoices

PO Number	Line Shipment	Item Description	Supplier Item Number	Ship To	Available Qty	Quantity To Invoice UOM	Unit Price Amount
3069703FY12.1	1	ADDITIONAL SERVICE INSTALLATION POLE 6064 WR #3748169		07400-036	1931.88	1.00 Each	1.00 1.00

**Invoice Summary**

Items	1.00
Less Retainage	0.00
Freight	0.00
Miscellaneous	0.00
Tax	0.00
<b>Total (USD)</b>	<b>1.00</b>

Step 3 of 4



Click the **[Recalculate Total]** Button at the bottom of the page to update the invoice total. Be sure this is the amount to invoice.



Click on the **[Next]** Button to review your invoice.

**Supplier**

[Personalize "Supplier"](#)

- \* Supplier **NARR ELECTRIC CO/NATIONAL GRID**
- Tax Payer ID
- \* Remit To **08**
- Address
- Remit To Bank Account
- Unique Remittance Identifier
- Remittance Check Digit

**Invoice**

[Personalize "Invoice"](#)

- \* Invoice Number **USER'S GUIDE TEST**
- \* Invoice Date **23-Feb-2012**
- Invoice Type **Standard**
- \* Currency **USD**
- Invoice Description **FOR VERSION 12 USER'S GUIDE**
- Attachment **None**

**Customer**

[Personalize "Customer"](#)

- \* Customer Tax Payer ID **SYS11976**
- Customer Name **State of Rhode Island**
- Address

**Items**

[Personalize "Items"](#)

[Personalize "Item Lines Table"](#)

PO Number	Line Shipment	Item Description	Supplier Item Number	Ship To	Available Qty	Quantity To Invoice UOM	Unit Price Amount
3069703FY12.1	1	ADDITIONAL SERVICE INSTALLATION POLE 6064		07400-	1931.88	1.00 Each	1.00 1.00

Done

Internet 100%

# RIFANS Supplier Portal User's Guide

## Finance Tab

### *Create Invoices*

<u>EXPENSES</u>	
Items	1.00
Less Retainage	0.00
Freight	0.00
Miscellaneous	0.00
Tax	0.00
Total (USD)	1.00

**O**

Step 4 of 4

Click on the **[Save]** Button if you are not ready to submit the invoice. It will be available for later submission.



If you are satisfied with your invoice, click on the **[Submit]** Button to submit.



# RIFANS Supplier Portal User's Guide

## [Finance Tab](#)

### [Create Invoices](#)

### Receive Confirmation

 **Confirmation**

Invoice USER'S GUIDE TEST was submitted to our Accounts Payable department on 03-May-2012. The confirmation number for this invoice is the invoice number. You can query its status by using Search by navigating to the Home page.

---

Invoice: USER'S GUIDE TEST

[Printable Page](#)   [Create Another](#)

Supplier	Invoice
* Supplier <b>NARR ELECTRIC CO/NATIONAL GRID</b>	* Invoice Number <b>USER'S GUIDE TEST</b>

# RIFANS Supplier Portal User's Guide

## Finance Tab

### View Invoices

Use the View Invoices search screen to find invoice information for processed invoices.

### Invoice Search

- Enter search criteria using any listed fields. Use **[Advanced Search]** for additional query fields. Click **[Go]**. A
- Or just click **[Go]** to execute search.

### Invoice Summary

- Review summary invoice information by clicking on **Invoice Number** link. B Note Status column for invoices On Hold. Note Payment Number column for paid invoice information.
- To review invoice with Status of On Hold click on the **On Hold** link to drill down to hold detail information (see Page 33 for descriptions).

### Invoice Payment Information

- Review invoice payment information by clicking on **Payment Number** link. C
- Review payment information – note **Invoice Number** cross-reference link at bottom of screen.

# RIFANS Supplier Portal User's Guide

## [Finance Tab](#)

### [View Payments](#)

Use the View Payments search screen to find payment information related to invoices.

Home Orders Shipments Admin Finance

Create Invoices View Invoices **View Payments**

View Payments Export

**Simple Search**

Note that the search is case insensitive

Payment Number

Invoice Number

PO Number  (example : 1234)

Release Number  (example : 1234-2)

Status

Payment Amount From  To

Payment Date From  (example: 18-Apr-2012) To

**A** Advanced Search

**B** Go Clear

Payment	Payment Date	Currency	Amount	Method	Status	Status Date	Invoice	PO Number	Address	Supplier Site
<a href="#">1141602</a>	30-Mar-2012	USD	559.86	Check	Negotiable	30-Mar-2012	<a href="#">12 405 032312 10 014 07</a>		NEWARK NJ	03
<a href="#">1140115</a>	29-Mar-2012	USD	10,659.40	Check	Negotiable	29-Mar-2012	<a href="#">00049-021907 (93130)</a>	<a href="#">3271776</a>	NEW YORK NY	05
<a href="#">1120764</a>	28-Mar-2012	USD	0.86	Check	Negotiable	28-Mar-2012	<a href="#">12 757 023112 10 076 2</a>		WABUON MA	00

### Payment Search

- Search criteria are used for payment queries. All fields do not have to be filled in.
- Click [**Advanced Search**] to search by invoice number. **A**

### Query by Invoice Number

- Enter invoice number. Click [**Go**].
- Or just click [**Go**] to execute search.

### Query Results and Payment Detail **B**

- Review results of query - summary payment information. Click on **Payment** link to access payment detail information.
- Review payment information – note **Invoice Number** cross-reference at bottom of screen.