



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:

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

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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.

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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 doa.stateportalhelp@doa.ri.gov or 401-222-1888, and they will send you a username and password to begin using the Supplier Portal.

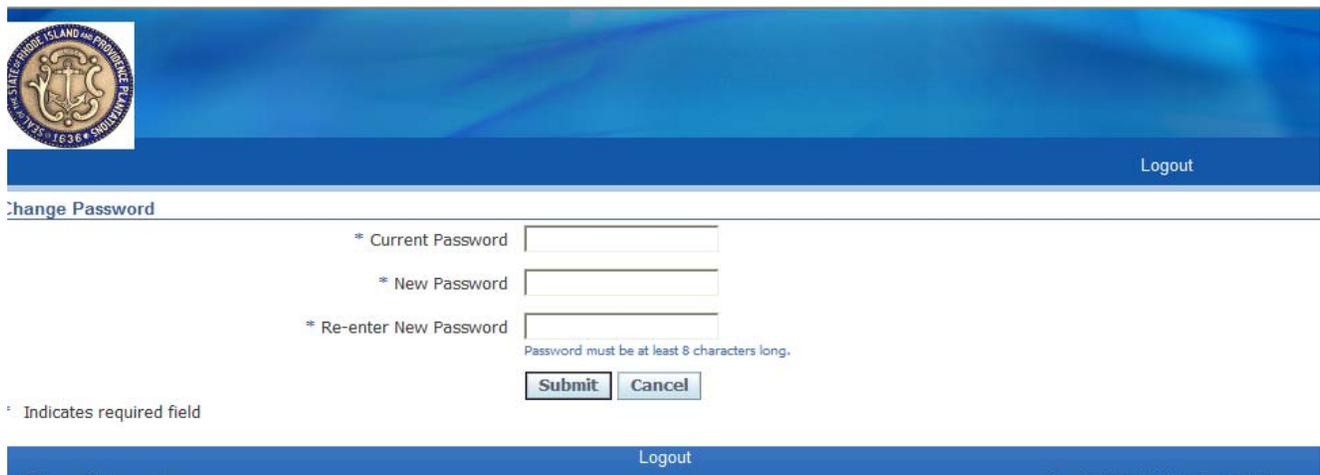
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Password Maintenance

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 note below the fields states "Password must be at least 8 characters long." There are "Submit" and "Cancel" buttons. A legend indicates that an asterisk (*) denotes a required field. The bottom of the page shows 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 doa.stateportalhelp@doa.ri.gov to have your account unlocked.

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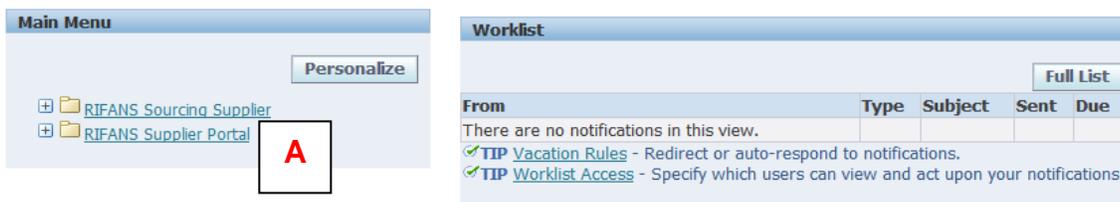
How to Navigate

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  (Shown on next page)

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[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, 'C' points to the Orders At A Glance section header, and 'D' points to the 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
You are invited: RFQ 7449273 (BOARD OF ELECTIONS - JANITORIAL SERVICES)	03-Jan-2012 15:24:47
You are invited: RFQ 7449348 (GENERATOR MAINTENANCE SERVICE - CCR1)	03-Jan-2012 10:12:26
Reminder: Please acknowledge intent to participate in RFQ 7449358 (IV ADMIXTURE SERVICES: ELEANOR SLATER HOSP. - CRANSTON UNIT AND ZAMBARANO UNIT)	01-Jan-2012 09:47:20
Reminder: Please acknowledge intent to participate in RFQ 7449349 (2.5 CUBIC YARD ELECTRIC SANDER FOR TRUCK - DEM)	31-Dec-2011 10:49:36
Reminder: Please acknowledge intent to participate in RFQ 7449351 (Restoration of the Eisenhower House, Newport, RI)	26-Dec-2011 15:28:46

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

Quick Search at Top of Page

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

Notifications

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

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

Quick Links

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

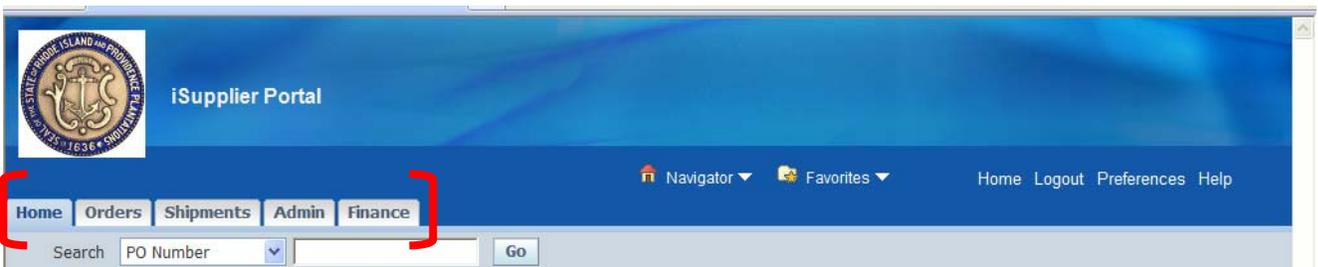
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How to Navigate

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.



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Admin Tab

General

The screenshot shows the iSupplier Portal interface. At the top left is the Rhode Island State Seal. The page title is "iSupplier Portal". Navigation links include "Home", "Orders", "Shipments", "Admin" (highlighted with a red box), and "Finance". A "Profile Management" sidebar on the left lists various options like "General", "Company Profile", "Organization", etc. The main content area is titled "General" and displays supplier information for "NARR ELECTRIC CO/NATIONAL" with a "Supplier Number 1056". Below this is the "Attachments" section, which includes a search bar and a table of existing attachments. A red box labeled "A" points to the "Attachments" header, and another red box labeled "B" points to the "Add Attachment..." button.

Title	Type	Description	Category	Last Updated	Usage	Update	Delete	Publish to Catalog
Undefined	Short Text		Miscellaneous	12-Nov-2009	One-Time			

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.

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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.

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Admin Tab

Organization

The screenshot shows a web browser window with the URL 'Organization'. The page title is 'iSupplier Portal'. The navigation bar includes 'Home', 'Orders', 'Shipments', 'Admin', and 'Finance'. The 'Admin' tab is selected, and the 'Profile Management' section is active. The 'Organization' sub-section is selected in the left sidebar. The main content area contains the following fields:

- D-U-N-S Number:
- Legal Structure: (with a search icon)
- Principal Name:
- Year Established:
- Incorporation Year:
- Control Year:
- Mission Statement:
- Chief Executive Name:
- Chief Executive Title:
- Principal Title:

Buttons for 'Cancel' and 'Save' are located in the top right corner. A red 'A' in a box is placed next to the 'Save' button. Below the main form is a section titled 'Total Employees' with the following fields:

- Organization Total:
- Corporate Total:
- Organization Total Type:
- Corporate Total Type:

The bottom of the page shows the start of a section titled 'Tax and Financial Information'.

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

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[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		
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.

Supplier Name **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 Email Address
Address Line 4
* City/Town/Locality Purchasing Address
County Payment Address
State/Region RFQ Only Address
Province
* Postal Code

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

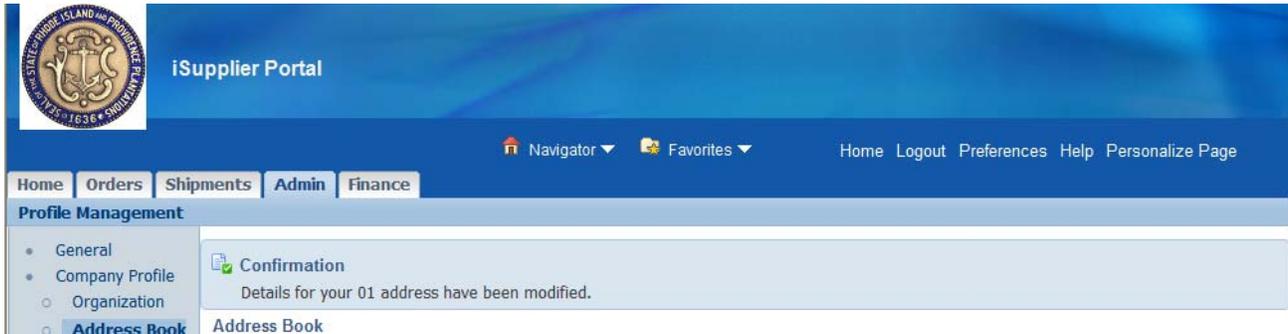


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[Admin Tab](#)

[Address Book](#)

5. Receive confirmation that your address has been changed.



The screenshot shows the RIFANS Supplier Portal interface. At the top left is the Rhode Island seal. The main header area contains the text "iSupplier Portal" and navigation links: "Home", "Logout", "Preferences", "Help", and "Personalize Page". Below this is a secondary navigation bar with "Home", "Orders", "Shipments", "Admin", and "Finance" tabs. The "Admin" tab is active, and the "Address Book" sub-tab is selected. A confirmation message is displayed in a light blue box, stating: "Confirmation: Details for your 01 address have been modified." The left sidebar lists menu items: "General", "Company Profile", "Organization", and "Address Book".

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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 doa.stateportalhelp@doa.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

Cancel Save

Cancel Save

B

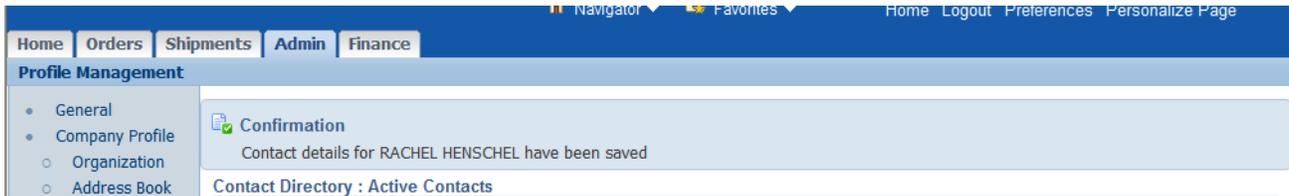
4. Make applicable edits.
5. Click **[Save]**. **B**

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Admin Tab

Contact Directory

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



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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. 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.

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"/>				

B

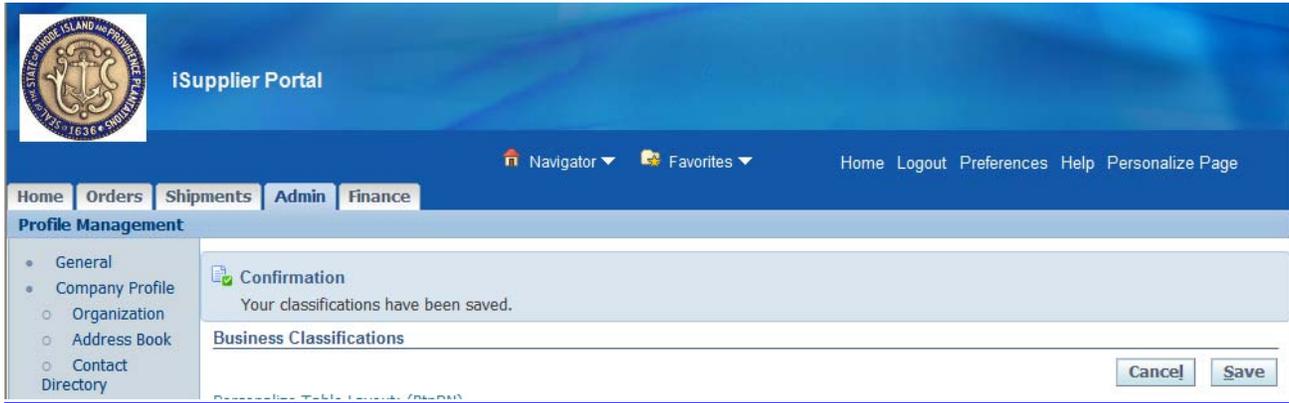
1. Click on the **Business Classifications** link.
2. Check the Applicable **Box** after the Classification that applies to your business. Complete all applicable fields. **A**
3. Click **[Save]**. **B**

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Admin Tab

Business Classifications

4. Receive a confirmation message.



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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 with 'Profile Management' selected. Under 'Product & Services', there is a table of registered commodity codes. The 'Add' button is highlighted with a red box labeled 'A'.

Select Code	Products and Services	Date Added	Approval Status	View Sub-Category
<input type="checkbox"/>	990 SECURITY, FIRE, SAFETY, AND EMERGENCY SERVICES	24-May-2011	Approved	

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

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

The screenshot shows the 'Add Products and Services' dialog. The 'Browse All Products & Services' radio button is highlighted with a red box labeled 'B', and the 'Apply' button is highlighted with a red box labeled 'C'.

Code	Products and Services	View Sub-Categories Applicable
005	ABRASIVES	<input type="checkbox"/> Applicable
010	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES	<input type="checkbox"/> Applicable
015	ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES: CHEMICALS, INKS, PAPER, ETC.	<input type="checkbox"/> Applicable
019	AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES	<input type="checkbox"/> Applicable
020	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)	<input type="checkbox"/> Applicable
022	AGRICULTURAL IMPLEMENT AND ACCESSORY PARTS	<input type="checkbox"/> Applicable
025	AIR COMPRESSORS AND ACCESSORIES	<input type="checkbox"/> Applicable
031	AIR CONDITIONING, HEATING, AND VENTILATING: EQUIPMENT, PARTS AND ACCESSORIES (SEE RELATED ITEMS IN CLASS 740)	<input type="checkbox"/> Applicable
035	AIRCRAFT AND AIRPORT EQUIPMENT, PARTS, AND SUPPLIES	<input type="checkbox"/> Applicable
037	AMUSEMENT, DECORATIONS, ENTERTAINMENT, TOYS, ETC.	<input type="checkbox"/> Applicable

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

To Browse the Full List:

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

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Admin Tab

Product and Services

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

Browse All Products & Services
 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:

Code	Description	Applicable
No search conducted.		

To Look for a Specific Commodity Code:

1. Select **Search for Specific Product & Service**.
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%**).
3. Click **[Go]** and review the results.

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"/>
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

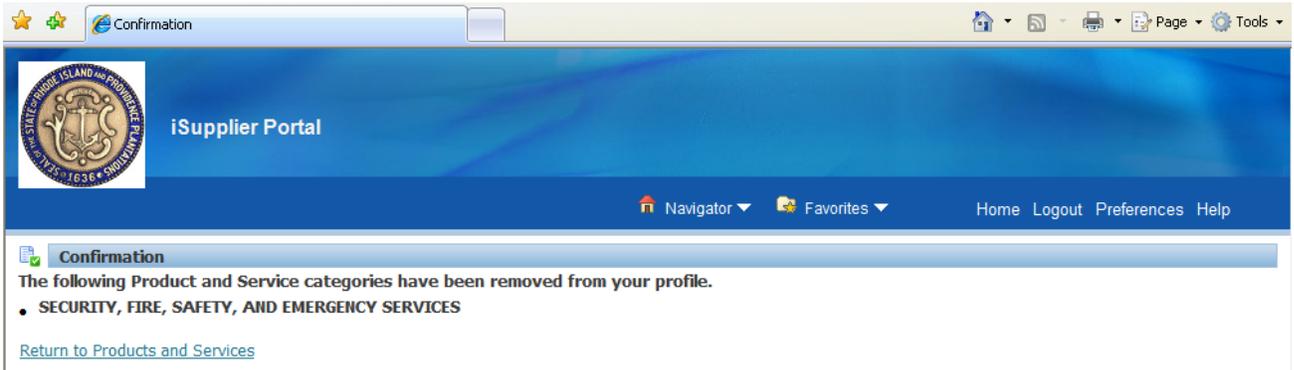
4. Select the proper service or product by clicking on the **Applicable** box for all items that you want to add. Choose the main code (codes ending in .00) rather than the sub-category code.
5. Click **[Apply]**.

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Admin Tab

Product and Services

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



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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 the URL 'Surveys'. The page header features the State of Rhode Island seal and the text 'iSupplier Portal'. Below the header is a navigation bar with tabs for 'Home', 'Orders', 'Shipments', 'Admin', and 'Finance'. The 'Admin' tab is selected, and the 'Surveys' sub-tab is active. The main content area displays a search result for 'Update NARR ELECTRIC CO/NATIONAL GRID - 1056: Surveys'. A table with three columns: 'Subject', 'Last Update By', and 'Last Update Date' is shown, containing the text 'No results found.'

Subject	Last Update By	Last Update Date
No results found.		

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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. The 'Purchase Orders' section is active, showing a list of orders. The 'Export' button is located in the top right of the list area. The 'View' dropdown menu is set to 'All Purchase Orders'. The first row of the table has the PO Number '3272418' highlighted with a red box 'C'.

PO Select Number	Operating Rev Unit	Document Type	Description	Order Date	Currency	Amount	Status	Acknowledge By	Attachments
3272418	0	Standard PO	DOT; FY12 U2003-CB-032NEC/REHAB CONSTRUCTION	30-Mar-2012 08:20:40	USD	32,707.67	Open		
3272334	0	State of Rhode Island Standard PO	DOT; FY12 U2003-CB-032NEC CONSTRUCTION	29-Mar-2012 12:42:01	USD	34,123.00	Open		
3272224	0	State of Rhode Island Standard PO	DOT; FY12 U2003CB029; MAPLEVILLE BRIDGE #337	29-Mar-2012 08:36:16	USD	15,067.77	Open		
3271313	1	State of Rhode Island 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**

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[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

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

PO Details

Show All Details | Hide All Details

Details	Line	Type	Item/Job	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		

Return to: 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**

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Orders Tab

Purchase Order Detail

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

PO Details												
Show All Details Hide All Details												
Details Line ^	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status			
1	Goods			USING DELIVERABLE FUELS (FY/11)	Each	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	06800-026	1250293.37	1122669.38	1122670.38	1,250,293.37	1,122,669.38	1,122,670.38		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 Status
3270456	0	No	DEL-10822; DOT; FY 12; U2011CB096NEC	15-Mar-2012 14:42:29	USD	15-Nov-2010	14-Nov-2015			
3265857	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			
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 A 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)

Previous 1-10 Next 10

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
39771 C	17-Jul-2008 13:06:40	Executive Branch								3091887		3091887	
3259189	23-Mar-2012	Executive Branch								3259189		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 interface. At the top, there are navigation tabs: Home, Orders, Shipments, Admin, and Finance. The Finance tab is selected. Below the tabs, there are links for 'Create Invoices', 'View Invoices', and 'View Payments'. The main area is titled 'Invoice Actions' and contains a search form. The search form includes fields for 'Supplier' (with 'NARR ELECTRIC CO/NATIONAL GRID' entered), 'Invoice Number' (with 'DJO-test4-10' entered), 'Invoice Date From', 'Invoice Date To', 'Purchase Order Number', 'Invoice Amount', 'Invoice Date To', and 'Currency'. There are 'Go' and 'Clear' buttons. Below the search form is a table of invoices. The table has 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', date '10-Apr-2012', currency 'USD', amount '1.00', purchase order '3259189', and status 'In Process'. There are 'Create Invoice' and 'With a PO' buttons at the bottom right.

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 doa.stateportalhelp@doa.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.

A

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	Unit	Price	Curr	Ship To	Organization	Packing Slip	Waybill
------------------	------	----------	------------------	----------------------	---------	----------	----------	------	-------	------	---------	--------------	--------------	---------

Input the purchase order number or purchase order date.

B

Click **[Go]**.

C

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"/>	3069703FY12	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:

[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"/>	3130031-151	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"/>	3130031-151	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"/>	3130031-151	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

Purchase Orders Details Manage Tax Review and Submit

Create Invoice: Details
* Indicates required field Step 2 of 4

TIP Please attach all pertinent backup including progress payment documentation, signed delivery slips, and/or receipt documentation.
 TIP PLEASE ENTER ALL INFORMATION IN CAPITAL LETTERS. THANK YOU.
[Personalize Table Layout: \(InvHeaderRN\)](#)

Supplier
[Personalize "Supplier"](#)
* Supplier **NARR ELECTRIC CO/NATIONAL GRID**
Tax Payer ID
* Remit To
Address **PO BOX 1049 WOBURN MA 01807-1049**
Remit To Bank Account
Unique Remittance Identifier
Remittance Check Digit

Invoice
[Personalize "Invoice"](#) **G**
* Invoice Number **H**
* Invoice Date **I**
(example: 21-Feb-2012)
Invoice Type
Currency **USD**
Invoice Description **J**
Attachment **None** **K**

Customer
[Personalize "Customer"](#)
* Customer Tax Payer ID

Customer Name **State of Rhode Island**
Address **One Capitol Hill Providence 02908-5860 US**

Items **L**

PO Number	Line	Shipment	Item Description	Supplier Item Number	Ship To	Available Quantity	*Quantity	Unit Price	UOM	Amount	
3069703FY12.1	1	1	ADDITIONAL SERVICE INSTALLATION POLE 6064 WR #3748169		07400-036	1931.88	<input type="text" value="1931.88"/>	1931.88	1	Each	<input type="text" value="1931.88"/>

 Step 2 of 4 **M**

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		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
Recalculate Total	Total (USD) 1.00

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		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

Description	Amount
Items	1.00
Less Retainage	0.00
Freight	0.00
Miscellaneous	0.00
Tax	0.00
Total (USD)	1.00

Cancel Save Back Step 4 of 4 Submit

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 NARR ELECTRIC CO/NATIONAL GRID	* Invoice Number USER'S GUIDE TEST

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.

Payment	Payment Date	Currency	Amount	Method	Status	Status Date	Invoice	PO Number	Address	Supplier Site
1141602	30-Mar-2012	USD	559.86	Check	Negotiable	30-Mar-2012	12 405 032312 10 014 07		NEWARK NJ	03
1140115	29-Mar-2012	USD	10,659.40	Check	Negotiable	29-Mar-2012	00049-021907 (93130)	3271776	NEW YORK NY	05
1120764	28-Mar-2012	USD	0.86	Check	Negotiable	28-Mar-2012	12 757 023112 10 076 2		WABUJON 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.