



# ***Manage Profile and Account Settings***

**Version No: 1.0**

**Date: 07/09/2023**

## **Overview**

*This document provides you the steps to manage profile and account settings.*

## Manage Profile and Account Settings


If you are an existing vendor, you are already registered in iSupplier and approved to perform transactions in the system.

You, as a Profile Administrator, for your organization, would have received an email like this, confirming your registration to iSupplier and asking you to log in with your new credentials.

Follow the steps below to manage profile and account settings:

1. Click the **Reset your password** link to proceed.


**For Your Information: Metrolinx Supplier Collaboration Network: Confirmation of Registration**



erpdev02

Mon 1/17/2022 2:38 PM

KIM DENRIKX <kim.derikx@globalknowledge.com>

 Notification Detail.html

748 bytes

To

KIM DENRIKX

Sent

17-JAN-2022 19:34:40

ID

2120035

You have been registered at Metrolinx for access to their supplier collaboration network. You can log in with the username kim.derikx@globalknowledge.com

In order to generate/reset your password, please click the below link and follow the instructions. This link is only available for 480 minutes.  
Contact Kevin.Ross@invalidemail.com for additional information.


Please click on the below link to access the training docs.  
[https://www.doingbusinesswithlco.com/content/dam/en/basepage/home/new-supplier-agent/demo/iSupplier/\\_jcr\\_content/content1/attachments\\_56676282\\_1664123043/file.res/iSupplierUserGuide.pdf](https://www.doingbusinesswithlco.com/content/dam/en/basepage/home/new-supplier-agent/demo/iSupplier/_jcr_content/content1/attachments_56676282_1664123043/file.res/iSupplierUserGuide.pdf)

Password Url: [Reset your password](#)

Click the **Reset your password** link to proceed.

Reply

Forward



If you are an existing vendor, you are already registered in iSupplier and approved to perform transactions in the system.

You, as a Profile Administrator, for your organization, would have received an email like this, confirming your registration to iSupplier and asking you to log in with your new credentials.

In this demonstration, the relevant fields are populated for you.

ORACLE

Reset Password

\* Indicates required field

Please enter your username and passwords below. The password you enter below will be used to replace your old password.

\* User Name

kim.derlo@globalknowneledge.com

\* Password

\*\*\*\*\*  
(8 characters or more)

\* Confirm Your Password

\*\*\*\*\*

Confirm Password

In this demonstration, the relevant fields are populated for you.

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About this Page

Privacy Statement

2. Click the **Confirm Password** button to reset your password.

ORACLE

Reset Password

\* Indicates required field

Please enter your username and passwords below. The password you enter below will be used to replace your old password.

\* User Name

kim.derlo@globalknowneledge.com

\* Password

\*\*\*\*\*  
(8 characters or more)

\* Confirm Your Password

\*\*\*\*\*

Confirm Password

Click the **Confirm Password** button to reset your password.

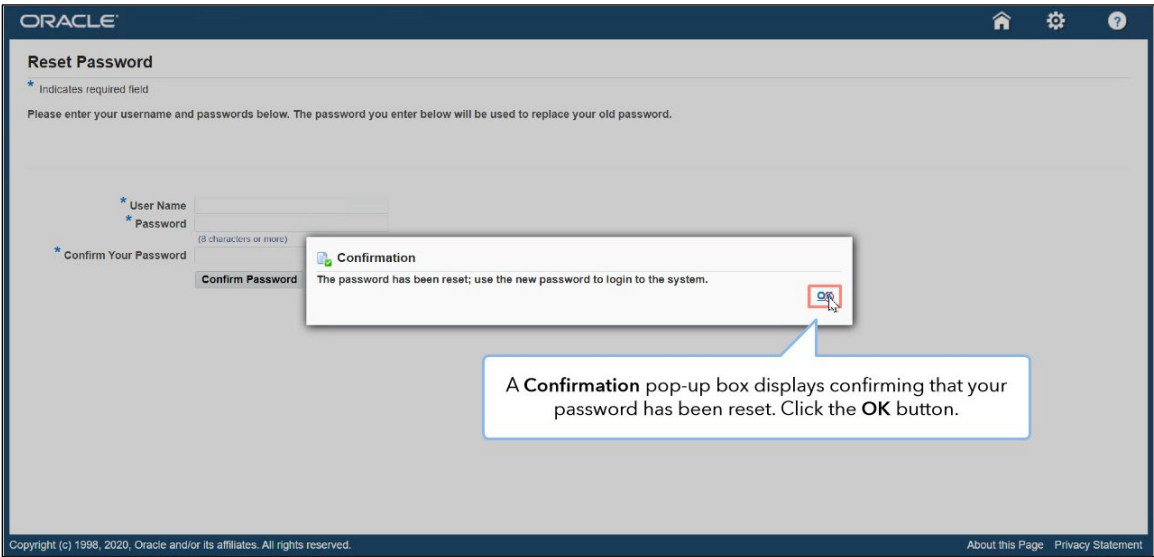
Copyright (c) 1998, 2020, Oracle and/or its affiliates. All rights reserved.

About this Page

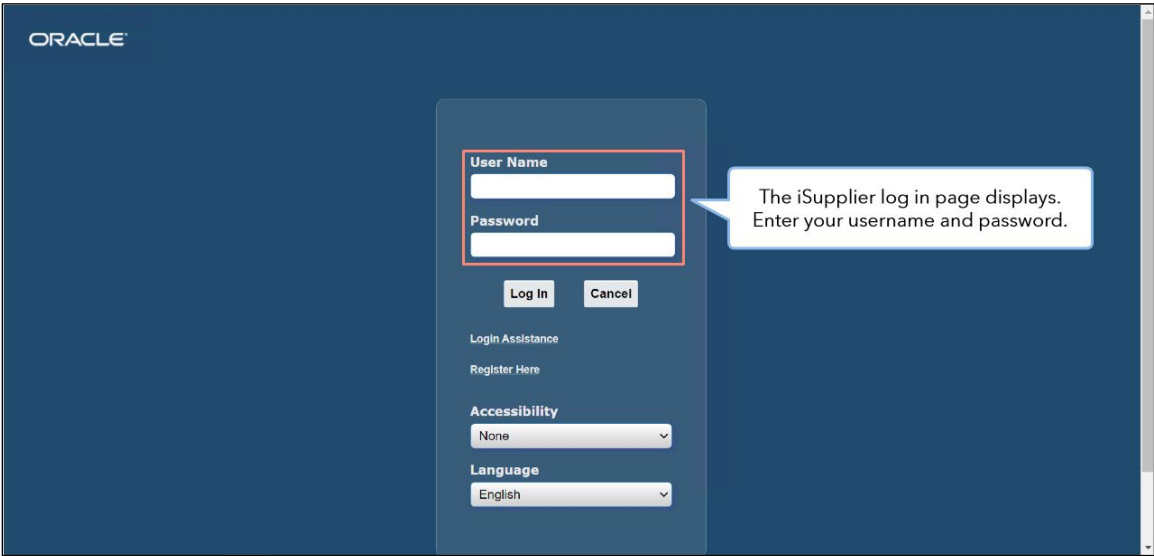
Privacy Statement

Page 3 of 60

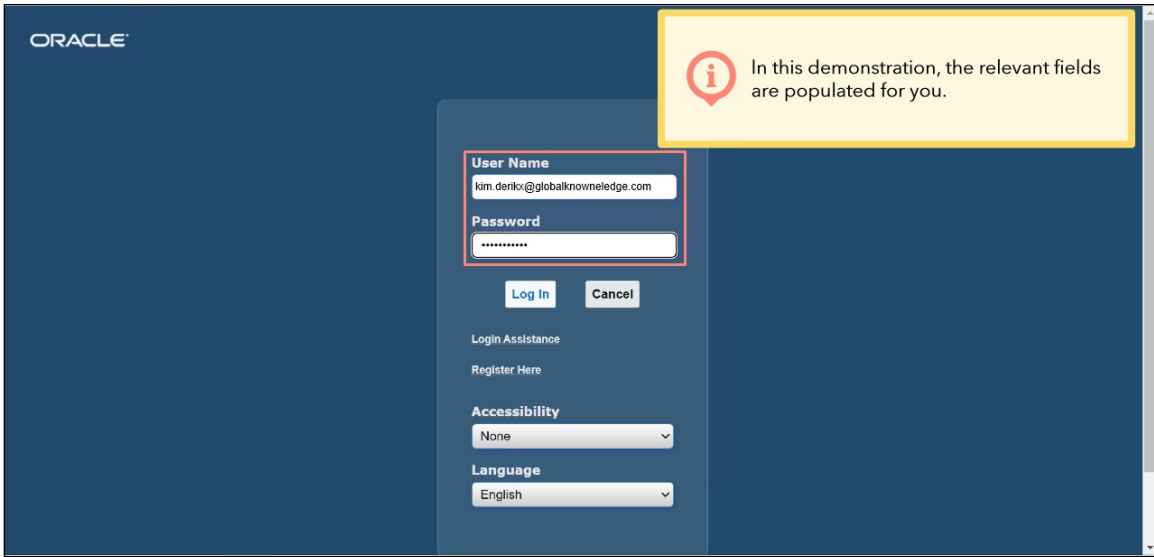
3. A **Confirmation** pop-up box displays confirming that your password has been reset. Click the **OK** button.



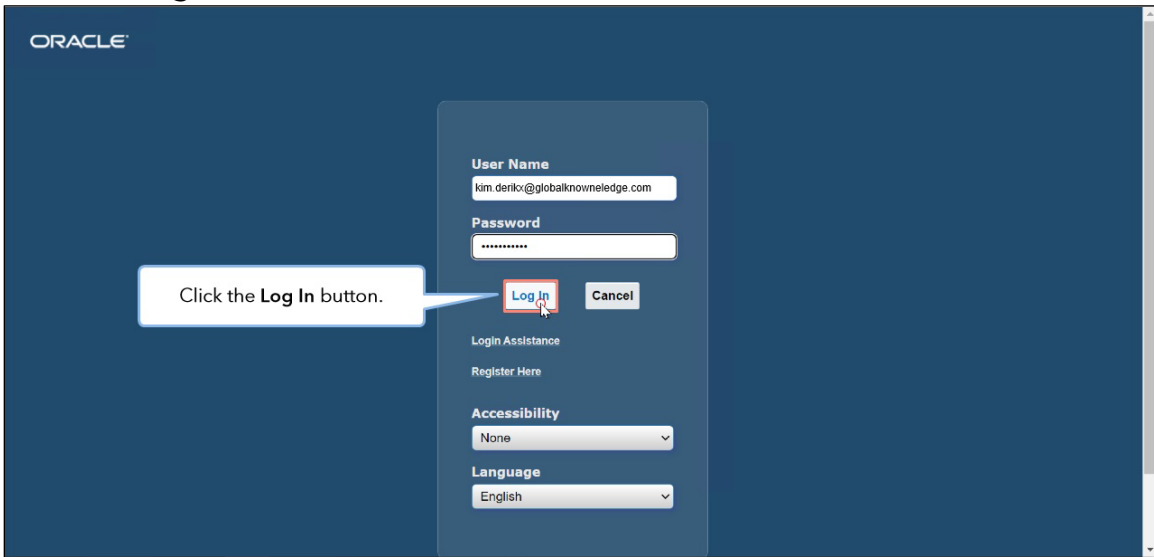
4. The iSupplier log in page displays. Enter your username and password.



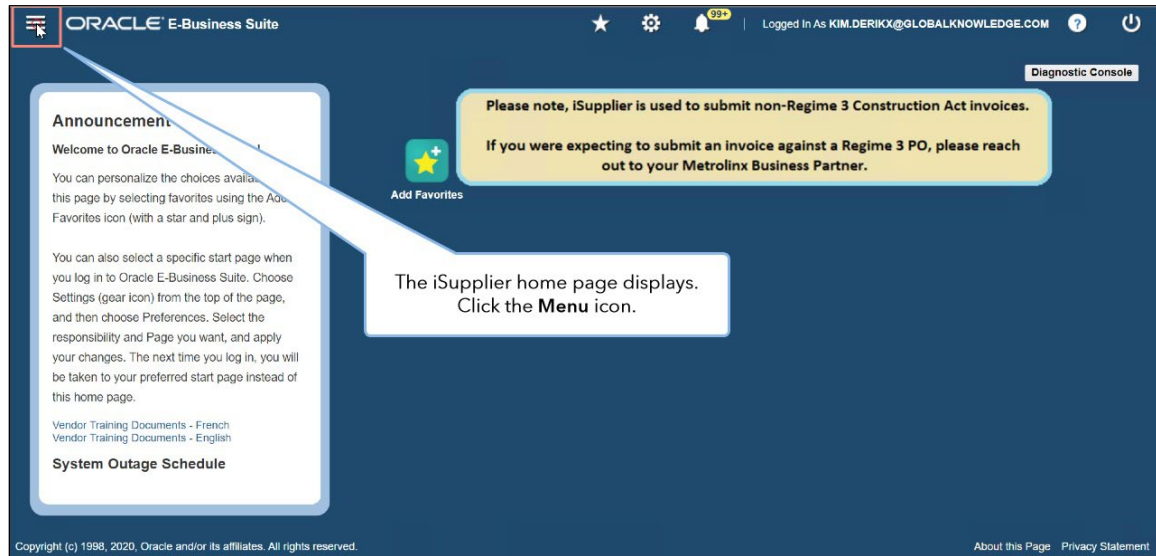
In this demonstration, the relevant fields are populated for you.



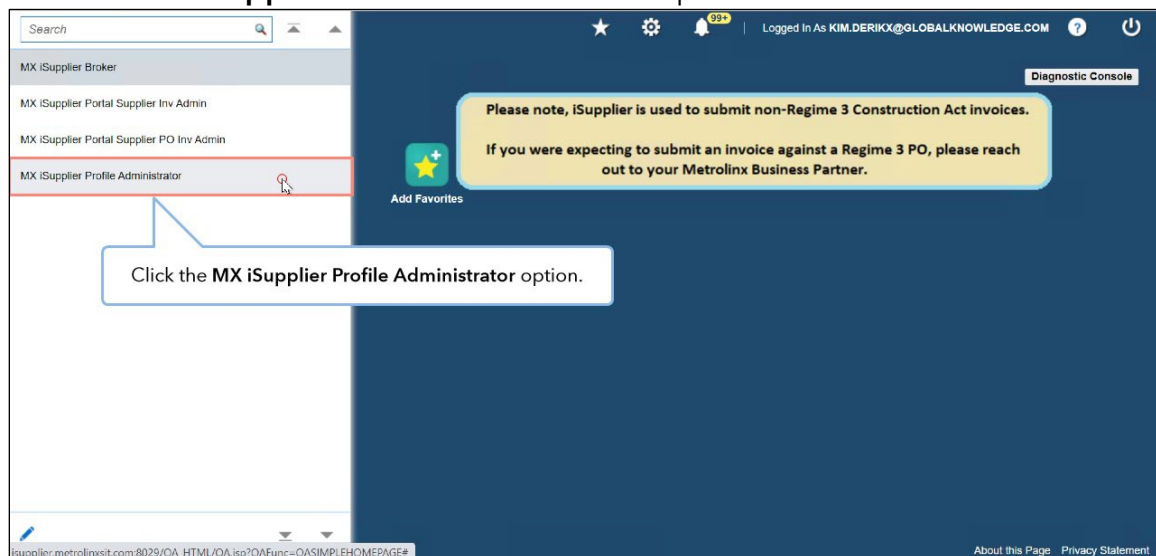
5. Click the **Log In** button.



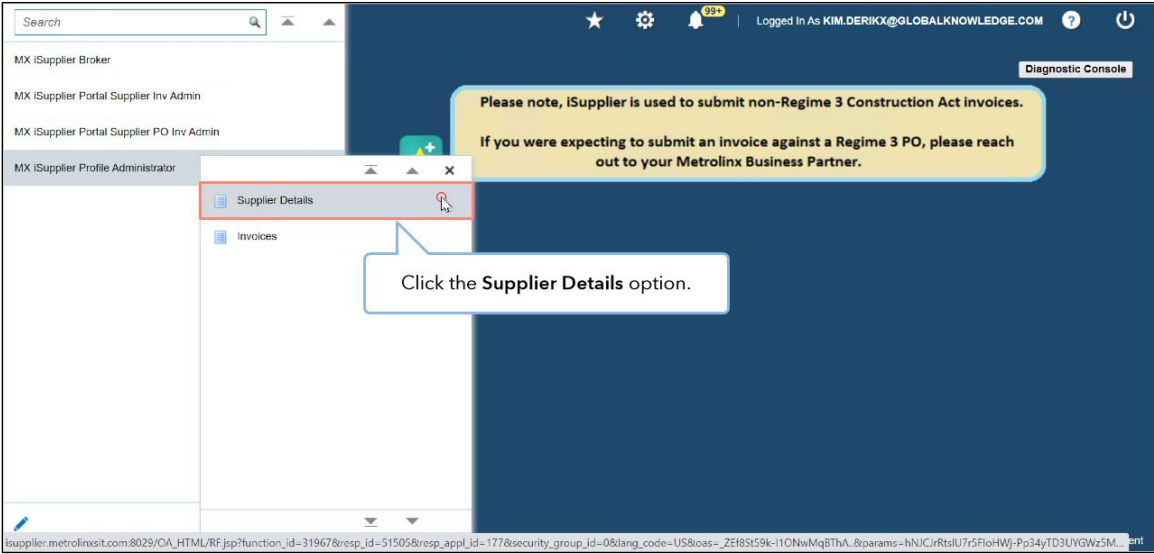
6. The iSupplier home page displays. Click the **Menu** icon.



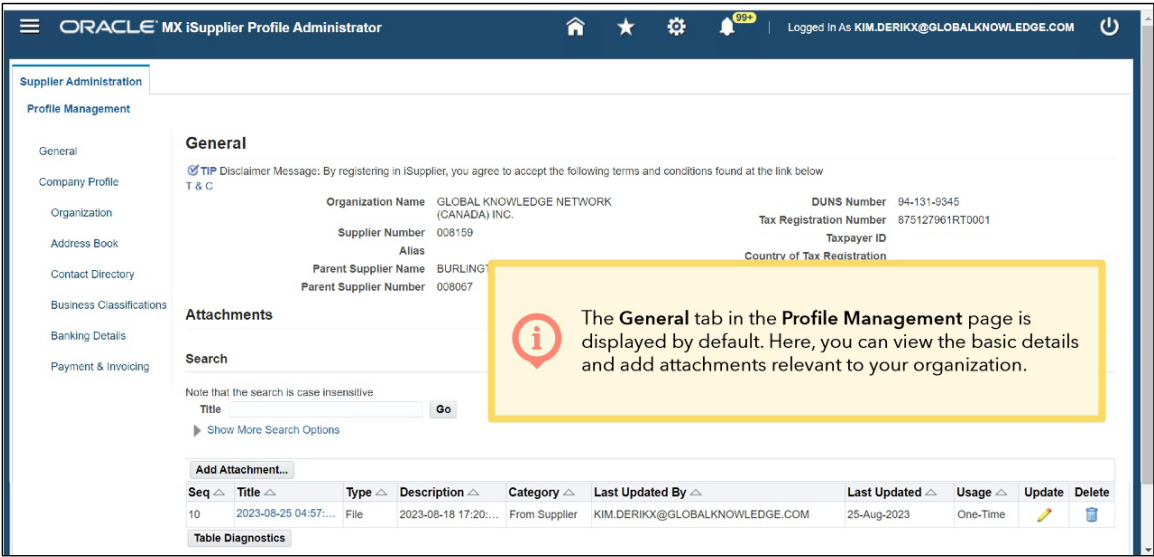
7. Click the **MX iSupplier Profile Administrator** option.



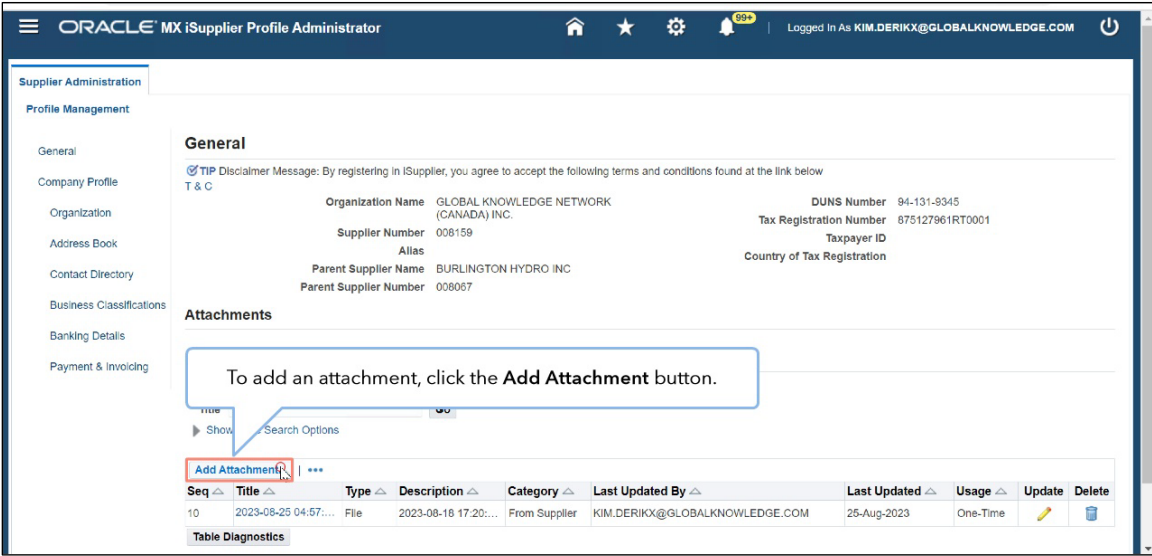
8. Click the **Supplier Details** option.



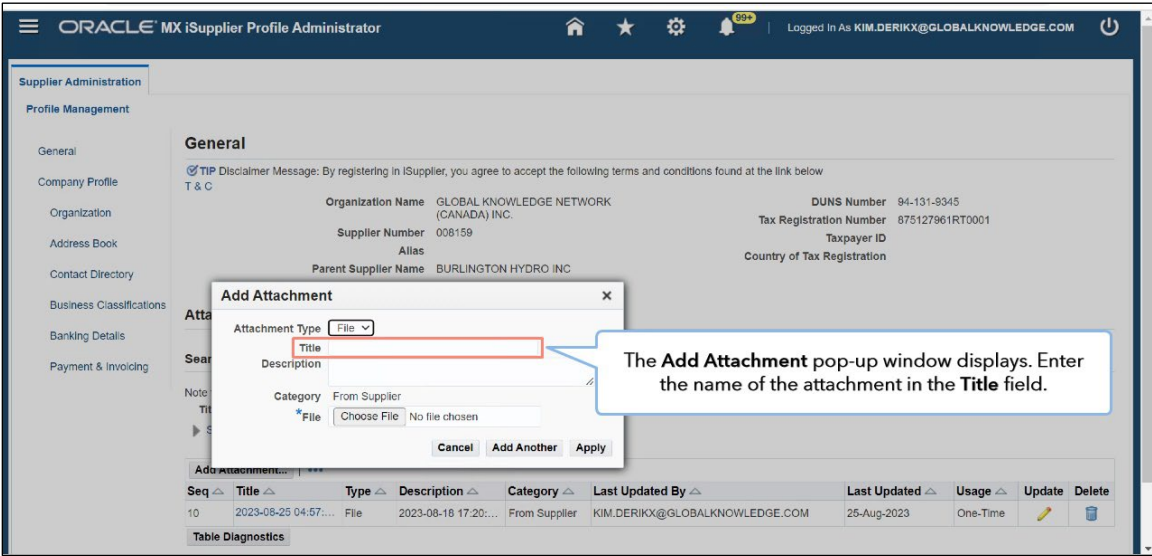
The **General** tab in the **Profile Management** page is displayed by default. Here, you can view the basic details and add attachments relevant to your organization.



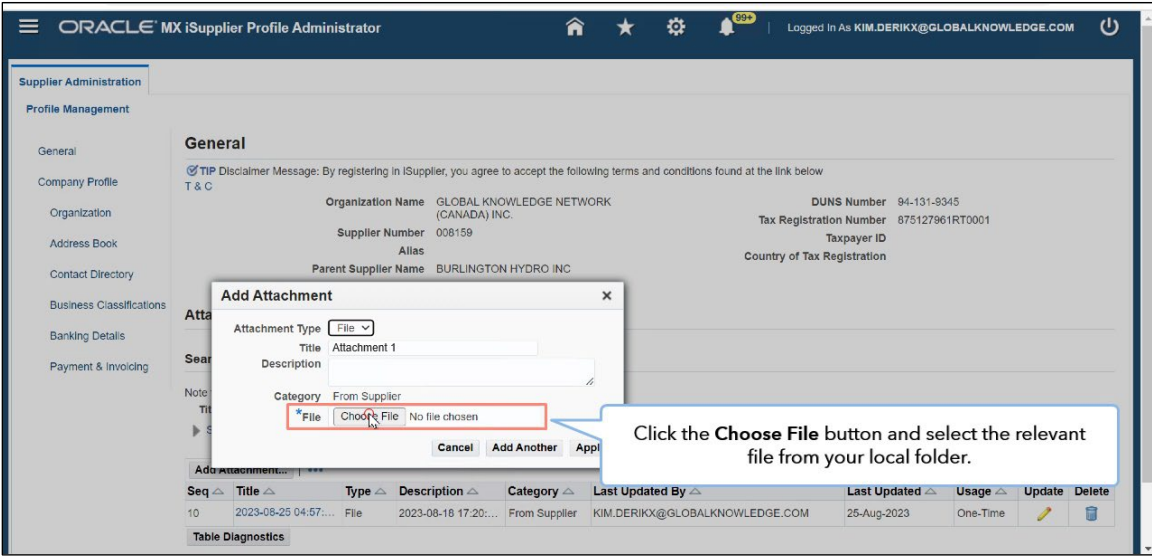
9. To add an attachment, click the **Add Attachment** button.



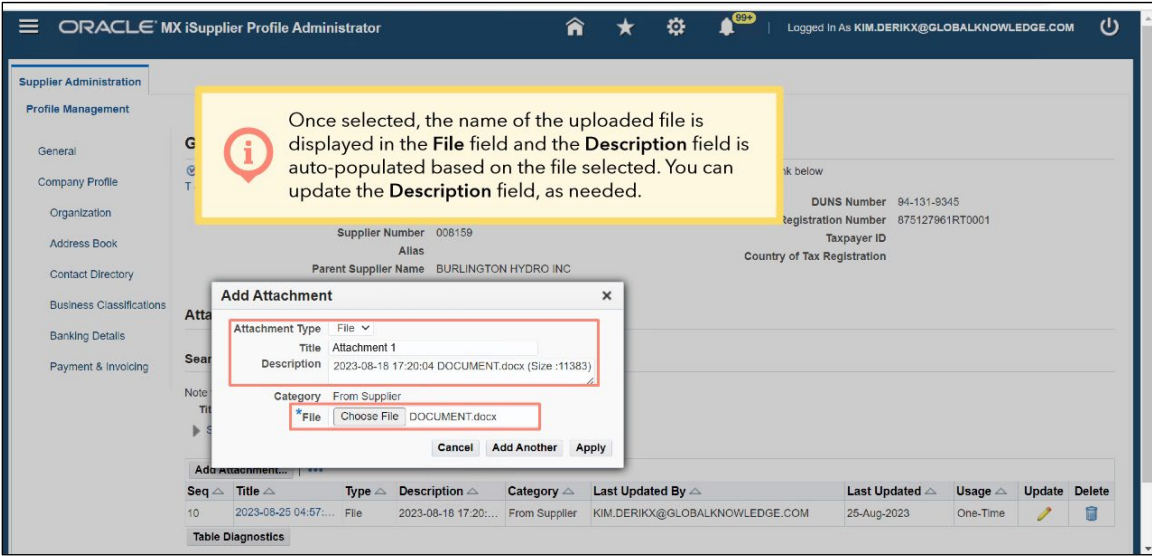
10. The **Add Attachment** pop-up window displays. Enter the name of the attachment in the **Title** field.



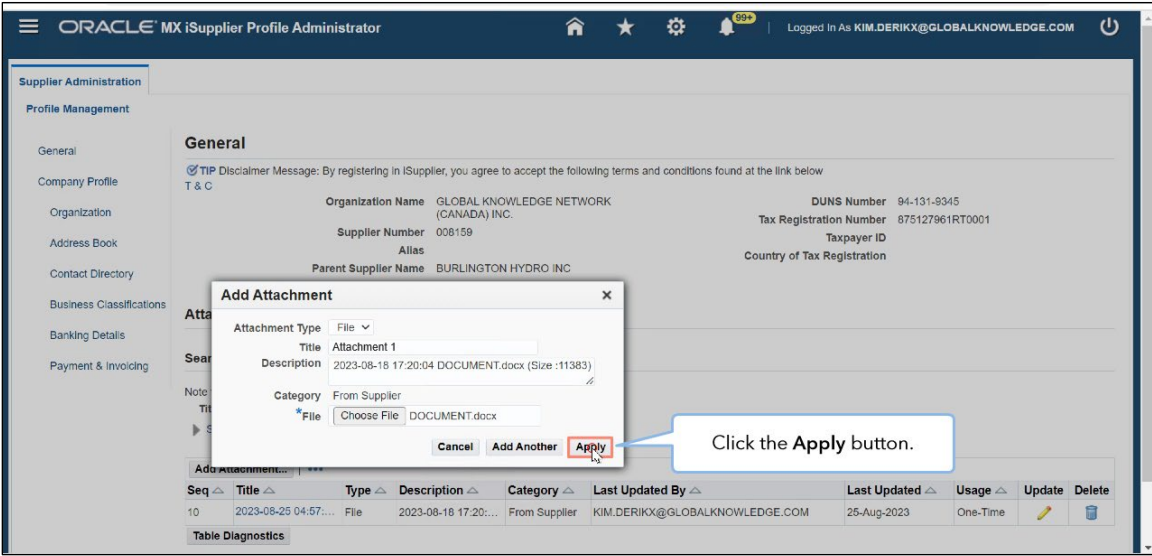
11. Click the **Choose File** button and select the relevant file from your local folder.



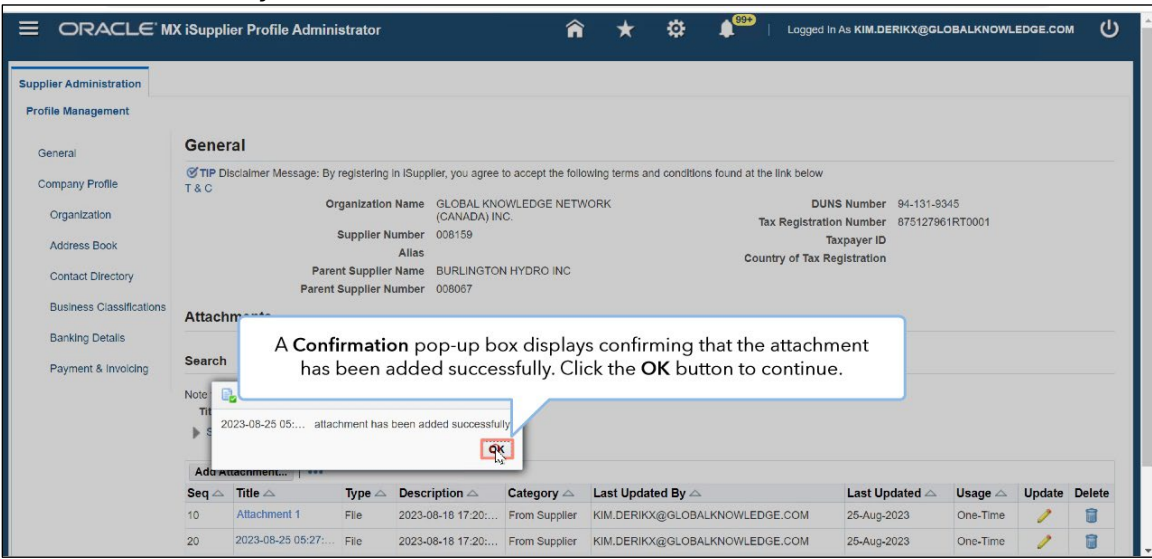
Once selected, the name of the uploaded file is displayed in the File field and the Description field is auto populated based on the file selected. You can update the Description field, as needed.



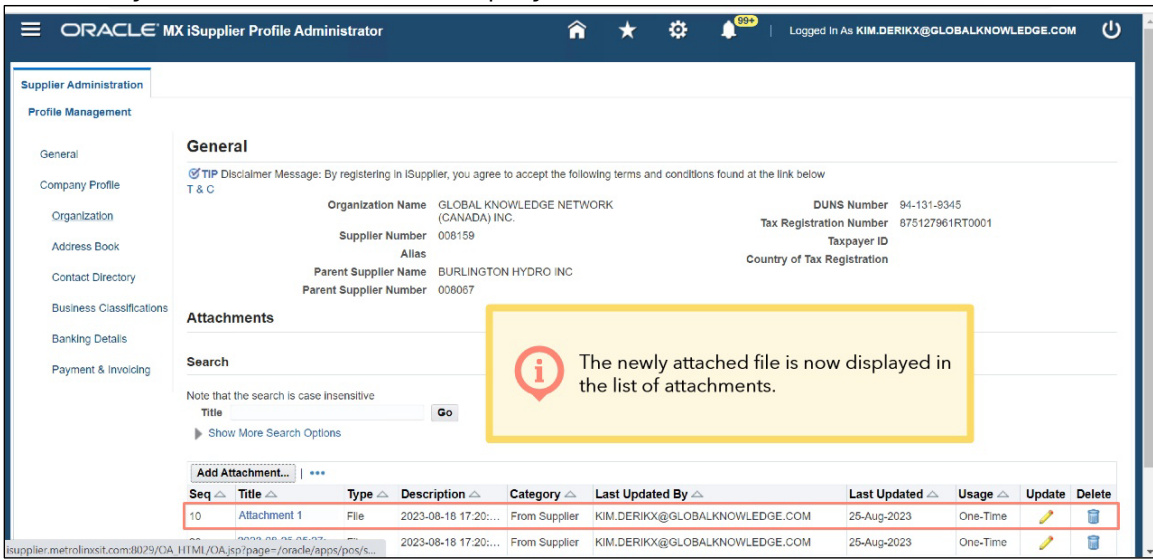
12. Click the **Apply** button.



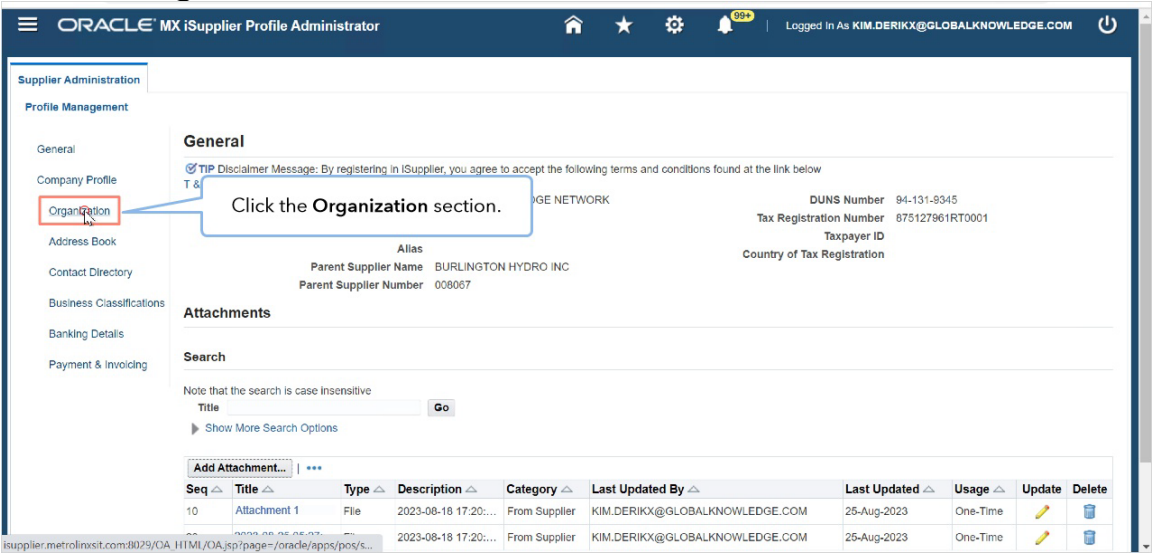
13. A **Confirmation** pop-up box displays confirming that the attachment has been added successfully. Click the **OK** button to continue.



The newly attached file is now displayed in the list of attachments.



14. Click the **Organization** section.



The **Organization** page displays. Here, you can validate the information that Metrolinx has added about your organization.

Supplier Administration

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Business Classifications

Banking Details

Payment & Invoicing

**Organization**

D-U-N-S Number 94-131-9345

Legal Structure

Principal Name

Year Established

SIN XXXXX6848  
SIN is a confidential field. Kindly enter valid 9 digit's number.

Chief Executive Name

Chief Executive Title

Principal Title

Incorporation Year

Control Year

Mission Statement

**Total Employees**

Organization Total

Corporate Total

Organization Total Type

Corporate Total Type

**Tax and Financial Information**

Taxpayer ID

Tax Registration Num 875127961RT0001

VAT Number

Fiscal Year End

Analysis Year

Currency Preference

Annual Revenue

Potential Revenue

For next fiscal year

Cancel Save

You can also add more information, if necessary, and click the **Save** button to save the changes.

Supplier Administration

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Business Classifications

Banking Details

Payment & Invoicing

**Organization**

D-U-N-S Number 94-131-9345

Legal Structure

Principal Name

Year Established

SIN XXXXX6848  
SIN is a confidential field. Kindly enter valid 9 digit's number.

Chief Executive Name

Chief Executive Title

Principal Title

Incorporation Year

Control Year

**Total Employees**

Organization Total

Corporate Total

Organization Total Type

Corporate Total Type

**Tax and Financial Information**

Taxpayer ID

Tax Registration Num 875127961RT0001

VAT Number

Fiscal Year End

Analysis Year

Currency Preference

Annual Revenue

Potential Revenue

For next fiscal year

Cancel Save

15. Click the **Address Book** section.

Supplier Administration

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Business Classifications

Banking Details

Payment & Invoicing

Organization

D-U-N-S Number 94-131-8345

Legal Structure

Principal Name

Chief Executive Name

Chief Executive Title

Principal Title

Incorporation Year

Control Year

Mission Statement

Total Employees

Organization Total

Organization Total Type

Corporate Total

Corporate Total Type

Tax and Financial Information

Taxpayer ID

Tax Registration Num 875127961RT0001

VAT Number

Fiscal Year End

Federal Agency

Analysis Year

Currency Preference

Annual Revenue

Potential Revenue

For next fiscal year

The **Address Book** page displays. Here, you can view, update, and add new addresses (also known as “sites”) related to your organization.

Supplier Administration

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Business Classifications

Banking Details

Payment & Invoicing

Address Book

Create

Address Name

Address Details

Country

Status

Update

Remove

150YORKSTREET

150 YORK ST  
SUITE 110  
TORONTO, ON M5H3S5

Canada

Current

2 Bloor St. E

2 Bloor St. E  
31st floor  
Toronto, ON M4W 1A8

Canada

Current

30 EGLINTON AVE W

30 EGLINTON AVE W  
SUITE 201  
TORONTO, ON M5J 1E6

Canada

Current

POB15872 STNA

PO BOX 15872  
STATION A  
Lockbox #15872  
TORONTO, ON M5W 1C1

Canada

Current

Table Diagnostics

Diagnostic Console

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About this Page Privacy Statement

16.To update an existing address, click the **Update** icon corresponding to that address.

Supplier Administration

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Business Classifications

Banking Details

Payment & Invoicing

Create

Address Name	Address Details	Country	Status	Update	Remove
150YORKSTREET	150 YORK ST SUITE 110 TORONTO, ON M5H3S5	Canada	Current		
2 Bloor St. E	2 Bloor St. E 31st floor Toronto, ON M4W 1A8	Canada	Current		
30 EGLINTON AVE W	30 EGLINTON AVE W SUITE 201 TORONTO, ON M5J 1E6	Canada	Current		
POB15872 STNA	PO BOX 15872 STATION A Lockbox #15872 TORONTO, ON M5W 1C1	Canada	Current		

Table Diagnostics

Diagnostic Console

To update an existing address, click the **Update** icon corresponding to that address.

The **Update Address** page displays. Here, you can update the fields, as needed.

Supplier Administration: Profile Management: Address Book >

Update Address

Cancel Save

\* Indicates required field

Supplier Name GLOBAL KNOWLEDGE NETWORK (CANADA) INC.

Supplier Number 008159

Country Canada

Address Name POB15872 STNA

Address Line 1 PO BOX 15872

Address Line 2 STATION A

Address Line 3 Lockbox #15872

Address Line 4

City TORONTO

County

State

Province ON

Postal Code M5W 1C1

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email Address ARrequests.nam@invalidemail.com

☐ Purchasing Address

☒ Payment Address

☐ RFQ Only Address

Address Purpose

+

Purpose

No results found.

Table Diagnostics

Note

The **Update Address** page displays. Here, you can update the fields, as needed.

17.Scroll down to view more details.

ORACLE MX iSupplier Profile Administrator

HomeStarSettings99+ | Logged In As KIM.DERIKX@GLOBALKNOWLEDGE.COM

Supplier Administration: Profile Management: Address Book >

Update Address

CancelSave

\* Indicates required field

Supplier NameGLOBAL KNOWLEDGE NETWORK (CANADA) INC.

Supplier Number008159

CountryCanada

\* Address NamePOB15872 STNA

\* Address Line 1PO BOX 15872

Address Line 2STATION A

Address Line 3Lockbox #15872

Address Line 4

CityTORONTO

County

State

ProvinceON

Postal CodeMSW 1C1

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email AddressARrequests.nam@invalidemail.com

☐ Purchasing Address

☒ Payment Address

☐ RFQ Only Address

Address Purpose

+

Purpose

No results found.

Remove

Table Diagnostics

Note

Note

Scroll down to view more details.

You can add the purpose of this address as well as any additional notes related to the address in the **Address Purpose** and **Note** sections.

Supplier Name (CANADA) INC.

Phone Area CodePhone Number

CountryCanada

\* Address NamePOB15872 STNA

\* Address Line 1PO BOX 15872

Address Line 2STATION A

Address Line 3Lockbox #15872

Address Line 4

CityTORONTO

County

State

ProvinceON

Postal CodeMSW 1C1

+

Purpose

No results found.

Remove

Table Diagnostics

Note

Note

You can add the purpose of this address as well as any additional notes related to the address in the **Address Purpose** and **Note** sections.

+

Purpose

No results found.

Remove

Table Diagnostics

Note

Note

Include any additional details about the address such as the type of address. This will be visible to other buyers within your organization as well as to the supplier. Also, include brief notes to buyer about the change when changing address information.

Diagnostics Console

CancelSave

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About this PagePrivacy Statement

Selecting the purpose of your address is not a mandatory requirement. You may choose to add a purpose if you wish to provide more details about an address or to make a distinction between multiple addresses for the benefit of your organization's contacts and Metrolinx employees.

Supplier Name (CANADA) INC.

Country Canada

Address Name POB15872 STNA

Address Line 1 PO BOX 15872

Address Line 2 STATION A

Address Line 3 Lockbox #15872

Address Line 4

City TORONTO

County

State

Province ON

Postal Code M5W 1C1

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email Address ARrequests.nam@invalidemail.com

☐ Purchasing Address

☒ Payment Address

☐ RFQ Only Address

Address Purpose

+

Purpose

No results found.

Remove

Table Diagnostics

Note

Note

Include any additional details about the address such as the type of address. This will be visible to other buyers within your organization as well as to the supplier. Also, include brief notes to buyers about the change when changing address information

Diagnostic Console

Cancel Save

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About this Page Privacy Statement

Selecting the purpose of your address is not a mandatory requirement. You may choose to add a purpose if you wish to provide more details about an address or to make a distinction between multiple addresses for the benefit of your organization's contacts and Metrolinx employees.

18.To add the purpose of the address, click the **Plus** icon in the **Address Purpose** section.

Supplier Name (CANADA) INC.

Country Canada

Address Name POB15872 STNA

Address Line 1 PO BOX 15872

Address Line 2 STATION A

Address Line 3 Lockbox #15872

Address Line 4

City TORONTO

County

State

Province ON

Postal Code M5W 1C1

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email Address ARrequests.nam@invalidemail.com

☐ Purchasing Address

☒ Payment Address

☐ RFQ Only Address

Address Purpose

+

Purpose

No results found.

Remove

Table Diagnostics

Note

Note

Include any additional details about the address such as the type of address. This will be visible to other buyers within your organization as well as to the supplier. Also, include brief notes to buyers about the change when changing address information

Diagnostic Console

Cancel Save

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About this Page Privacy Statement

To add the purpose of the address, click the Plus icon in the Address Purpose section.

19. The **Purpose** drop-down menu displays. Click the drop-down arrow to view the list of options.

Supplier Name (CANADA) INC.

Country: Canada

Address Name: POB15872 STNA

Address Line 1: PO BOX 15872

Address Line 2: STATION A

Address Line 3: Lockbox #15872

Address Line 4:

City: TORONTO

County:

State:

Province: ON

Postal Code: M5W 1C1

Phone Area Code:

Phone Number:

Fax Area Code:

Fax Number:

Email Address: ARrequests.nam@invalidemail.com

☐ Purchasing Address

☒ Payment Address

☐ RFQ Only Address

**Address Purpose**

+ Purpose Remove

Acknowledgments

Table Diagnostics

Note

Note

Include any additional details about the address such as the type of address. This will be visible to other buyers within your organization as well as to the supplier. Also, include brief notes to buyer about the change when changing address information

Diagnostic Console

Cancel Save

20. The list of options is displayed. Scroll down to view the complete list.

Supplier Name (CANADA) INC.

Country: Canada

Address Name: TNA

Address Line 1: 72

Address Line 2: 872

Address Line 3:

Address Line 4:

City:

County:

State:

Province:

Postal Code:

Phone Area Code:

Phone Number:

Fax Area Code:

Fax Number:

Email Address: ARrequests.nam@invalidemail.com

☐ Purchasing Address

☒ Payment Address

☐ RFQ Only Address

**Address Purpose**

+ Purpose Remove

Acknowledgments

Address Book Address

Administered By

Bills of lading

Collateral Mail To

Authorizations

Claims

Bill To

Business

Birthplace

Correspondence

Customer Region

Discharge Planning

Eligibility

Exchange Billing

Credit Card Billing

Credit Memos

Drawee

Deliver To

Distribution Center

Acknowledgments

Table Diagnostics

Note

Note

Include any additional details about the address such as the type of address. This will be visible to other buyers within your organization as well as to the supplier. Also, include brief notes to buyer about the change when changing address information

Diagnostic Console

Cancel Save

21. Select the appropriate option from the list. In this demonstration, we have selected the **Address Book Address** option.

The screenshot shows a web form for 'Supplier Name (CANADA) INC.'. The form includes fields for Country (Canada), Address Name (POB15872 STNA), Address Line 1 (PO BOX 15872), Address Line 2 (STATION A), Address Line 3 (Lockbox #15872), Address Line 4, City (TORONTO), County, State, Province (ON), and Postal Code (M5W 1C1). There are also fields for Phone Area Code, Phone Number, Fax Area Code, Fax Number, and Email Address (ARrequests.nam@invalidemail.com). The 'Address Purpose' section has a dropdown menu with 'Address Book Address' selected. A callout box points to this dropdown with the text: 'Select the appropriate option from the list. In this demonstration, we have selected the Address Book Address option.' The form also includes a 'Note' field, a 'Diagnostic Console' button, and 'Cancel' and 'Save' buttons.

22. Enter relevant notes in the **Note** field.

This screenshot is identical to the previous one, but with a callout box pointing to the 'Note' field. The callout box contains the text: 'Enter relevant notes in the Note field.' The 'Note' field is highlighted with a red border, indicating where the user should enter their notes.

In the **Note** field, you can include any additional details about the address. You can also include notes to Metrolinx about the change when changing address information.

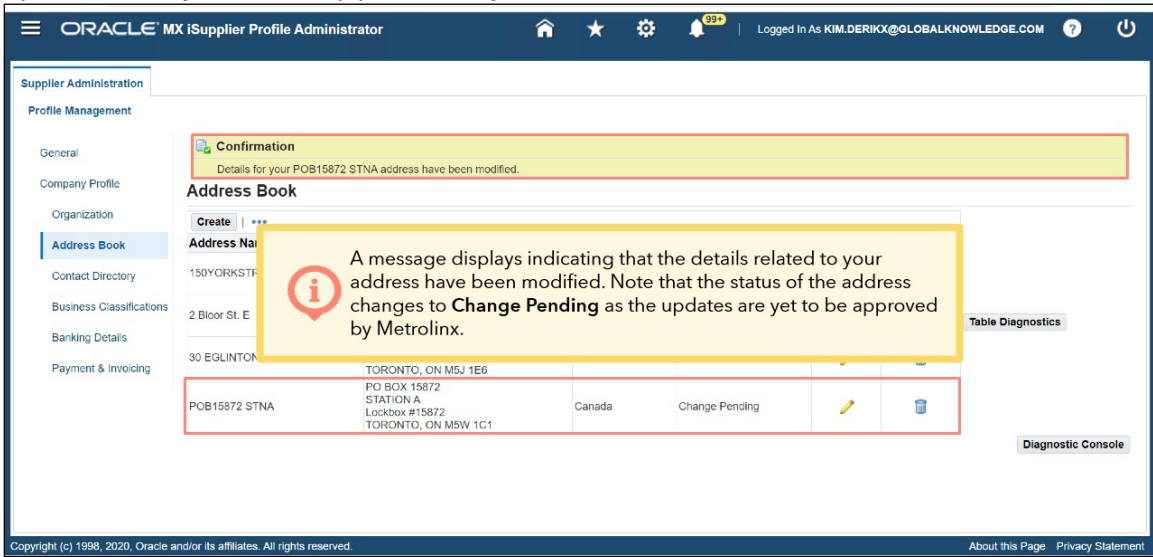
What you enter in this field will be visible to other contacts within your organization as well as to Metrolinx.

The screenshot shows the 'Supplier Name (CANADA) INC.' form. The 'Address' section includes fields for Country (Canada), Address Name (POB15872 STNA), Address Line 1 (PO BOX 15872), Address Line 2 (STATION A), Address Line 3 (Lockbox #15872), Address Line 4, City (TORONTO), County, State, Province (ON), and Postal Code (M5W 1C1). The 'Phone' section includes Phone Area Code, Phone Number, Fax Area Code, Fax Number, and Email Address (ARrequests.nam@invalidemail.com). The 'Address Purpose' section has a 'Purpose' dropdown set to 'Address Book Address' and a 'Table Diagnostics' button. The 'Note' field contains the text 'Address purpose changed to "Address Book Address"'. A yellow callout box with an information icon states: 'In the **Note** field, you can include any additional details about the address. You can also include notes to Metrolinx about the change when changing address information. What you enter in this field will be visible to other contacts within your organization as well as to Metrolinx.' At the bottom right are buttons for 'Diagnostic Console', 'Cancel', and 'Save'.

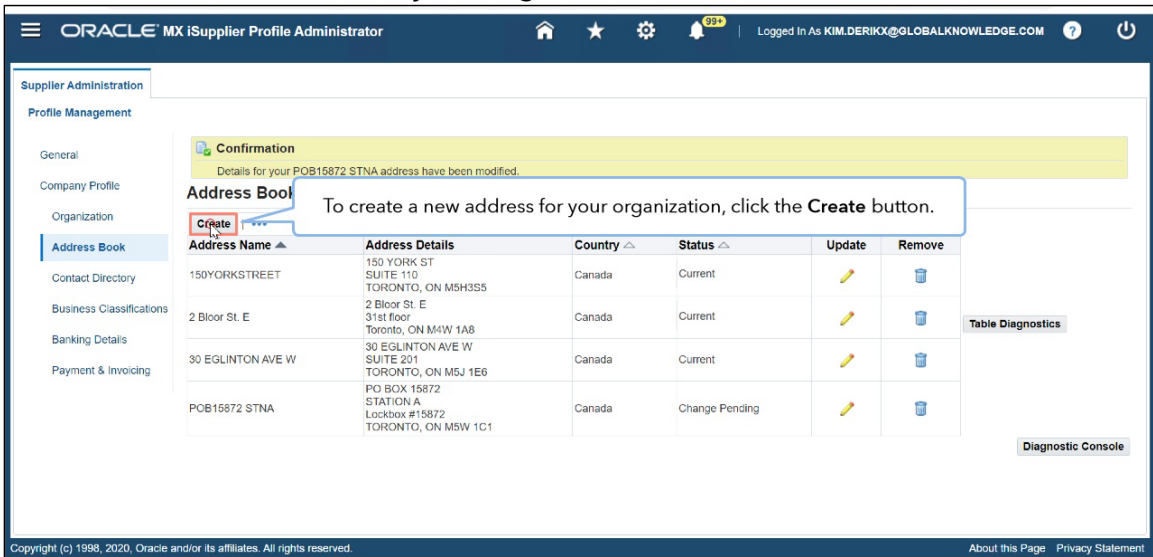
23. Click the **Save** button to save your updates.

This screenshot is identical to the previous one, showing the same form fields and the 'Note' field content. A blue callout box with a speech bubble icon points to the 'Save' button at the bottom right, containing the text: 'Click the **Save** button to save your updates.'

A message displays indicating that the details related to your address have been modified. Note that the status of the address changes to **Change Pending** as the updates are yet to be approved by Metrolinx.



24.To create a new address for your organization, click the **Create** button.



The **Create Address** page displays. Enter the relevant details in the following fields, such as **Address Name**, **Address Line 1**, **City**, **Province**, and **Postal Code**.

ORACLE MX iSupplier Profile Administrator

Supplier Administration: Profile Management: Address Book >

Create Address

\* Indicates required field

Supplier NameGLOBAL KNOWLEDGE NETWORK (CANADA) INC.

CountryCanada

\* Address Name

\* Address Line 1

Address Line 2

Address Line 3

Address Line 4

City

County

State

Province

Postal Code

Supplier Number000100

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email Address

☐ Purchasing Address

☐ Payment Address

☐ RFQ Only Address

Address Purpose

+

Purpose

No results found.

Table Diagnostics

Remove

Note

Note

i

The **Create Address** page displays. Enter the relevant details in the following fields, such as **Address Name**, **Address Line 1**, **City**, **Province**, and **Postal Code**.

In this demonstration, the relevant fields are populated for you.

ORACLE MX iSupplier Profile Administrator

Supplier Administration: Profile Management: Address Book >

Create Address

\* Indicates required field

Supplier NameGLOBAL KNOWLEDGE NETWORK (CANADA) INC.

CountryCanada

\* Address NameTRADE BUILDING

\* Address Line 1506 PACIFIC STREET

Address Line 2

Address Line 3

Address Line 4

City

County

StateVANCOUVER

ProvinceON

Postal Code

Supplier Number000100

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email Address

☐ Purchasing Address

☐ Payment Address

☐ RFQ Only Address

Address Purpose

+

Purpose

No results found.

Table Diagnostics

Remove

Note

Note

i

In this demonstration, the relevant fields are populated for you.

25. Select the **Purchasing Address** check box.

ORACLE MX iSupplier Profile Administrator

Supplier Administration: Profile Management: Address Book >

Create Address

Supplier Name GLOBAL KNOWLEDGE NETWORK (CANADA) INC.

Supplier Number 008159

Country Canada

Address Name TRADE BUILDING

Address Line 1 506 PACIFIC STREET

Address Line 2

Address Line 3

Address Line 4

City

County

State VANCOUVER

Province ON

Postal Code

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email Address

☐ Purchasing Address

☐ Payment Address

Select the Purchasing Address check box.

Address Purpose

+

Purpose No results found. Remove

Table Diagnostics

Note

Note

26. Select the **Payment Address** check box.

ORACLE MX iSupplier Profile Administrator

Supplier Administration: Profile Management: Address Book >

Create Address

Supplier Name GLOBAL KNOWLEDGE NETWORK (CANADA) INC.

Supplier Number 008159

Country Canada

Address Name TRADE BUILDING

Address Line 1 506 PACIFIC STREET

Address Line 2

Address Line 3

Address Line 4

City

County

State VANCOUVER

Province ON

Postal Code

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email Address

☒ Purchasing Address

☐ Payment Address

☐ RFQ Only Address

Select the Payment Address check box.

Address Purpose

+

Purpose No results found. Remove

Table Diagnostics

Note

Note

Selecting the **Purchasing Address** option ensures that Metrolinx can create POs for this address. Selecting the **Payment Address** option ensures that the address can be used for payment purposes as a billing address. Note that you can select either or both the options, as needed.

ORACLE MX iSupplier Profile Administrator

Supplier Administration: Profile Management: Address Book >

Create Address

Supplier Name: GLOBAL KNOWLEDGE NETWORK (CANADA) INC. Supplier Number: 008159

Country: Canada

Address Name: TRADE BUILDING

Address Line 1: 506 PACIFIC STREET

Address Line 2:

Address Line 3:

Address Line 4:

City:

County:

State: VANCOUVER

Province: ON

Postal Code:

Phone Area Code:

Phone Number:

Fax Area Code:

Fax Number:

Email Address:

☒ Purchasing Address

☒ Payment Address

☐ RFQ Only Address

Address Purpose

+

Purpose

No results found.

Table Diagnostics

Note

Info

Selecting the **Purchasing Address** option ensures that Metrolinx can create POs for this address. Selecting the **Payment Address** option ensures that the address can be used for payment purposes as a billing address. Note that you can select either or both the options, as needed.

You can add the purpose of this address in the **Address Purpose** section.

Supplier Administration: Profile Management: Address Book >

**Create Address** Cancel Save

\* Indicates required field

Supplier Name GLOBAL KNOWLEDGE NETWORK (CANADA) INC. Supplier Number 008159

Country Canada

\* Address Name TRADE BUILDING

\* Address Line 1 506 PACIFIC STREET

Address Line 2

Address Line 3

Address Line 4

City

County

State VANCOUVER

Province ON

Postal Code

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email Address

**Address Purpose**

Purpose	Remove
No results found.	

[Table Diagnostics](#)

**Note**

Note

Scroll down to view more details.

Supplier Administration: Profile Management: Address Book >

**Create Address** Cancel Save

\* Indicates required field

Supplier Name GLOBAL KNOWLEDGE NETWORK (CANADA) INC. Supplier Number 008159

Country Canada

\* Address Name TRADE BUILDING

\* Address Line 1 506 PACIFIC STREET

Address Line 2

Address Line 3

Address Line 4

City

County

State VANCOUVER

Province ON

Postal Code

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email Address

☒ Purchasing Address

☒ Payment Address

☐ RFQ Only Address

**Address Purpose**

Purpose	Remove
Business	

[Table Diagnostics](#)

**Note**

Note

You can add any additional notes related to the address in the **Note** section.

CountryCanada

\* Address NameTRADE BUILDING

\* Address Line 1506 PACIFIC STREET

Address Line 2

Address Line 3

Address Line 4

City

County

StateVANCOUVER

ProvinceON

Postal Code

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email Address

☒ Purchasing Address

☒ Payment Address

☐ RFQ Only Address

Address Purpose

+

PurposeBusiness

Remove

Table Diagnostics

Note

Note

Include any additional details about the address such as the type of address. This will be visible to other buyers within your organization as well as to the supplier. Also, include brief notes to buyer about the change when changing address information

Diagnostic Console

CancelSave

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In this demonstration, the relevant fields are populated for you.

CountryCanada

\* Address NameTRADE BUILDING

\* Address Line 1506 PACIFIC STREET

Address Line 2

Address Line 3

Address Line 4

City

County

StateVANCOUVER

ProvinceON

Postal Code

Phone Area Code

Phone Number

Fax Area Code

Fax Number

Email Address

☒ Purchasing Address

☒ Payment Address

☐ RFQ Only Address

Address Purpose

+

PurposeBusiness

Remove

Table Diagnostics

Note

NoteA new address has been added for Purchasing and Payment address.

Include any additional details about the address such as the type of address. This will be visible to other buyers within your organization as well as to the supplier. Also, include brief notes to buyer about the change when changing address information

Diagnostic Console

CancelSave

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About this PagePrivacy Statement

27. Click the **Save** link.

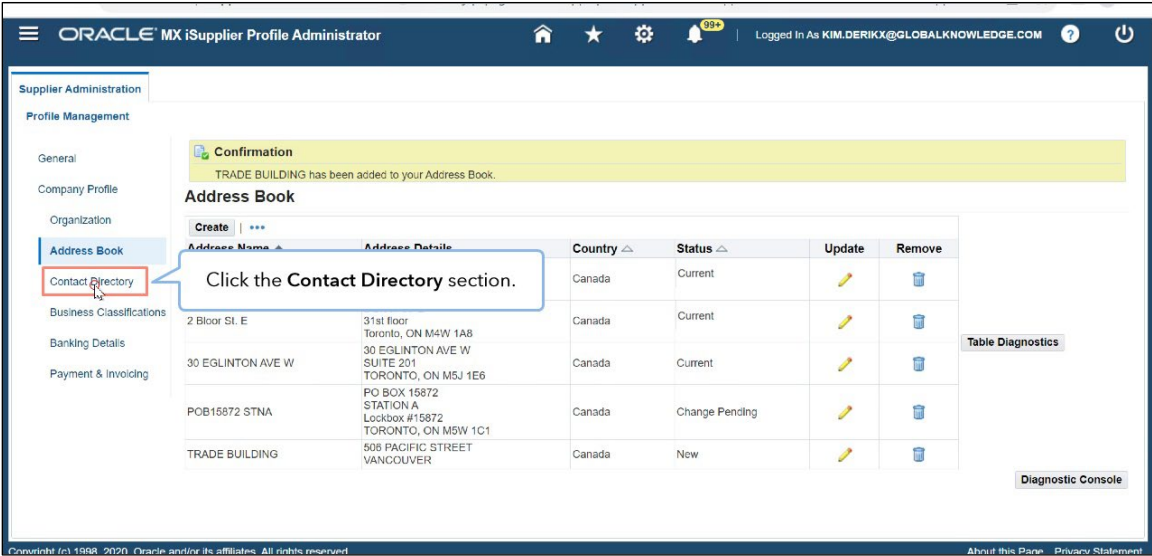
Country: Canada  
Address Name: TRADE BUILDING  
Address Line 1: 506 PACIFIC STREET  
Address Line 2:  
Address Line 3:  
Address Line 4:  
City:  
County:  
State: VANCOUVER  
Province: ON  
Postal Code:  
Phone Area Code:  
Phone Number:  
Fax Area Code:  
Fax Number:  
Email Address:  
☒ Purchasing Address  
☒ Payment Address  
☐ RFQ Only Address  
Address Purpose:  
Purpose: Business  
Remove  
Table Diagnostics  
Note:  
A new address has been added for Purchasing and Payment address.  
Include any additional details about the address such as the type of address. This will be visible to other buyers within your organization as well as to the supplier. Also, include brief notes to help about the changes when changing address information.  
Click the **Save** button.  
Save

A message displays, confirming that the address has been added to your **Address Book**. Metrolinx will receive a notification to review the new address. Once the new address is approved, you can use it as a payment and/or purchasing address, as per your selection.

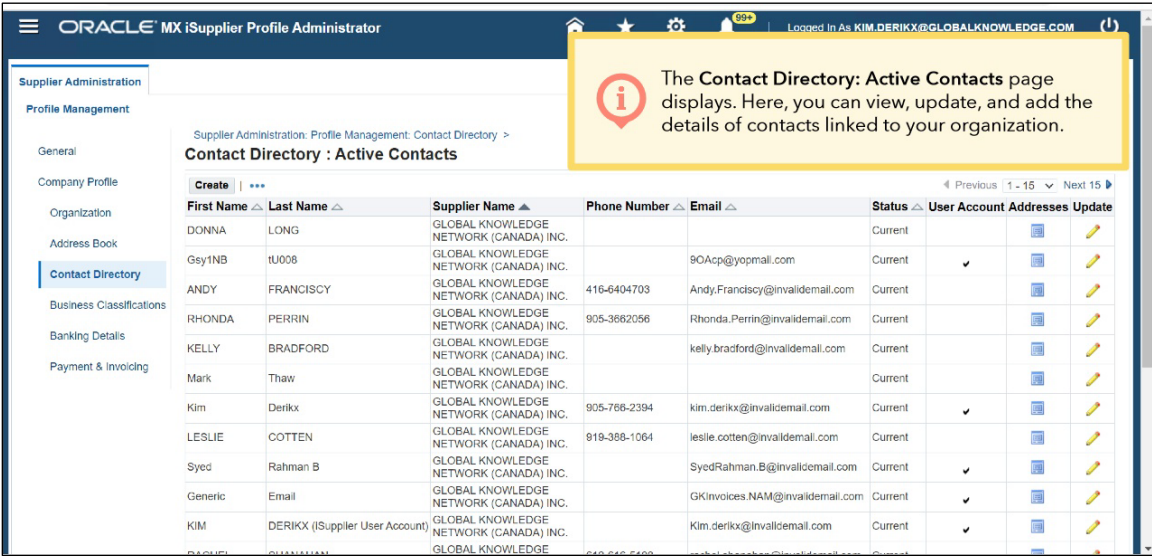
ORACLE MX iSupplier Profile Administrator  
Supplier Administration  
Profile Management  
General  
Company Profile  
Organization  
Address Book  
Contact Directory  
Business Classifications  
Banking Details  
Payment & Invoicing  
Confirmation  
TRADE BUILDING has been added to your Address Book.  
Address Book  
Create | \*\*\*  
A message displays, confirming that the address has been added to your Address Book. Metrolinx will receive a notification to review the new address. Once the new address is approved, you can use it as a payment and/or purchasing address, as per your selection.  
Table Diagnostics  
Diagnostic Console

150'	TORONTO, ON M5J 1E6	Canada	Change Pending		
2 BK	PO BOX 15872 STATION A Lockbox #15872 TORONTO, ON M5W 1C1	Canada	Change Pending		
30 E	TRADE BUILDING 506 PACIFIC STREET VANCOUVER	Canada	New		

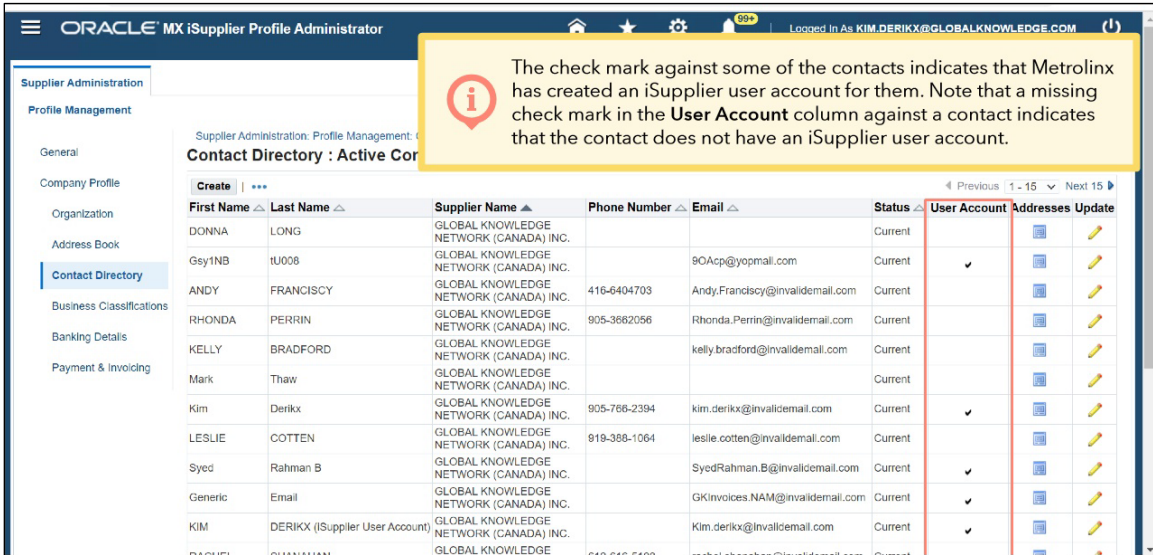
28. Click the **Contact Directory** section.



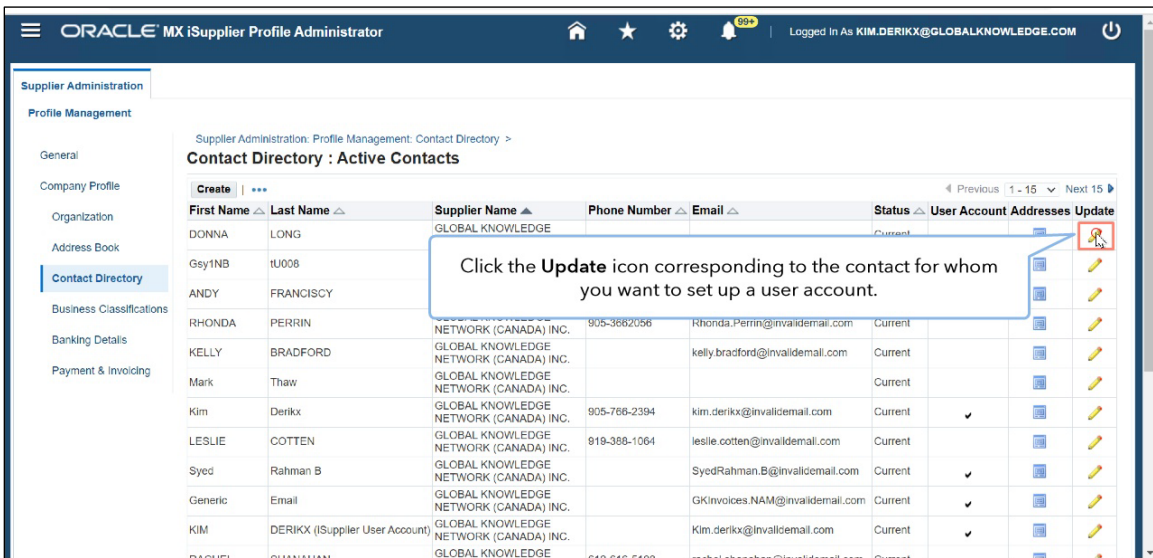
The **Contact Directory: Active Contacts** page displays. Here, you can view, update, and add the details of contacts linked to your organization.



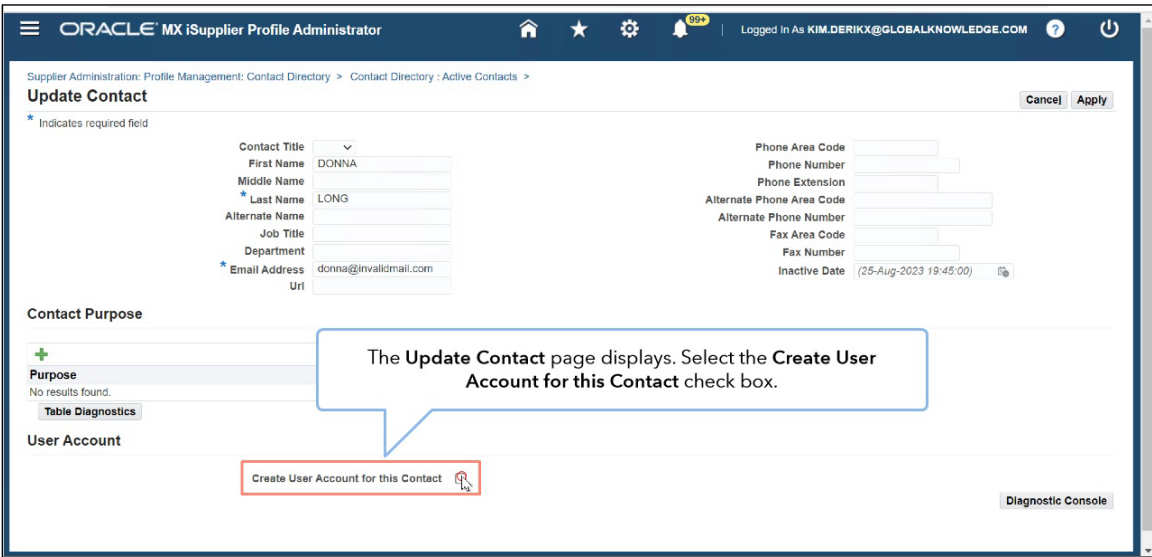
The check mark against some of the contacts indicates that Metrolinx has created an iSupplier user account for them. Note that a missing check mark in the **User Account** column against a contact indicates that the contact does not have an iSupplier user account.



29. Click the **Update** icon corresponding to the contact for whom you want to set up a user account.

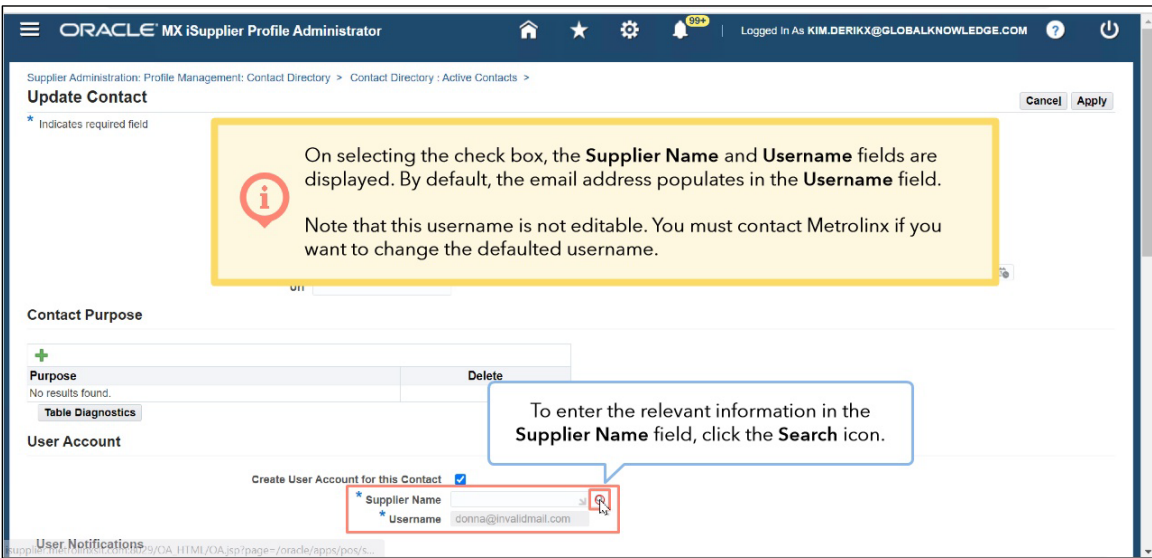


30.The **Update Contact** page displays. Select the **Create User Account for this Contact** check box.

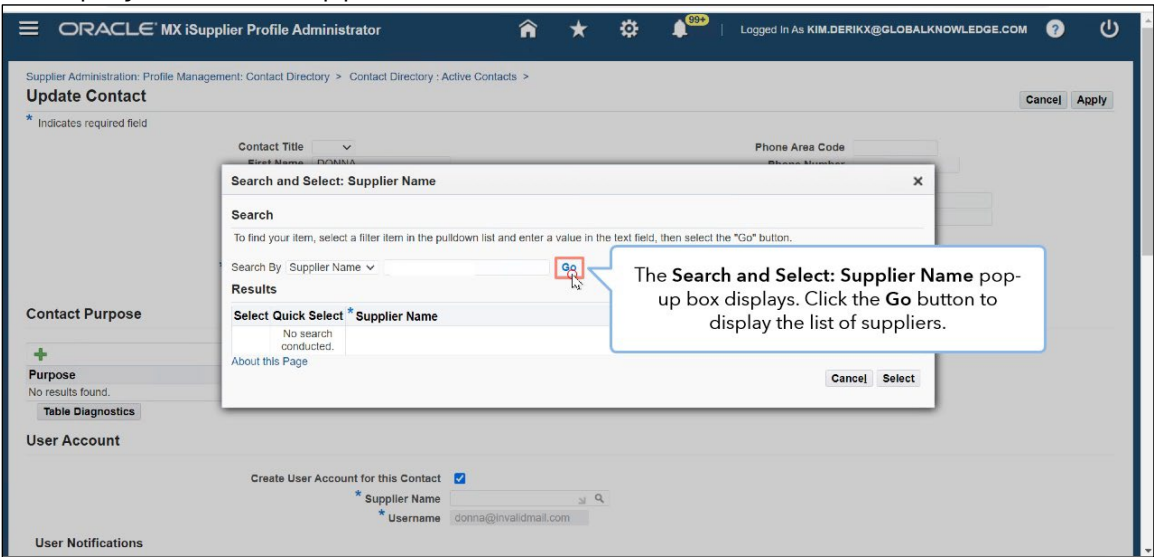


On selecting the check box, the **Supplier Name** and **Username** fields are displayed. By default, the email address populates in the **Username** field.

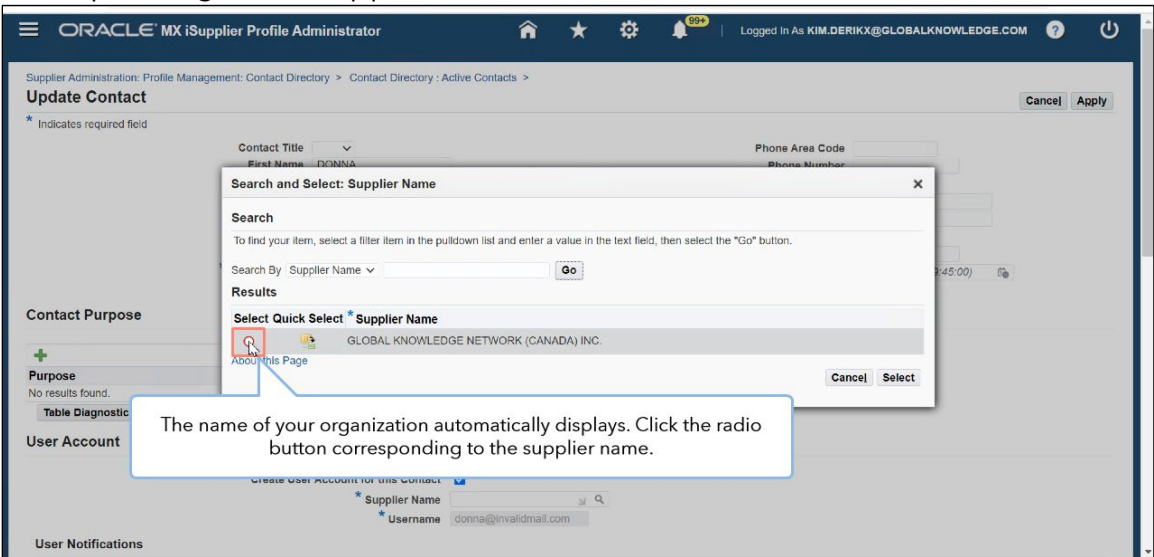
**Note:** This username is not editable. You must contact Metrolinx if you want to change the defaulted username.



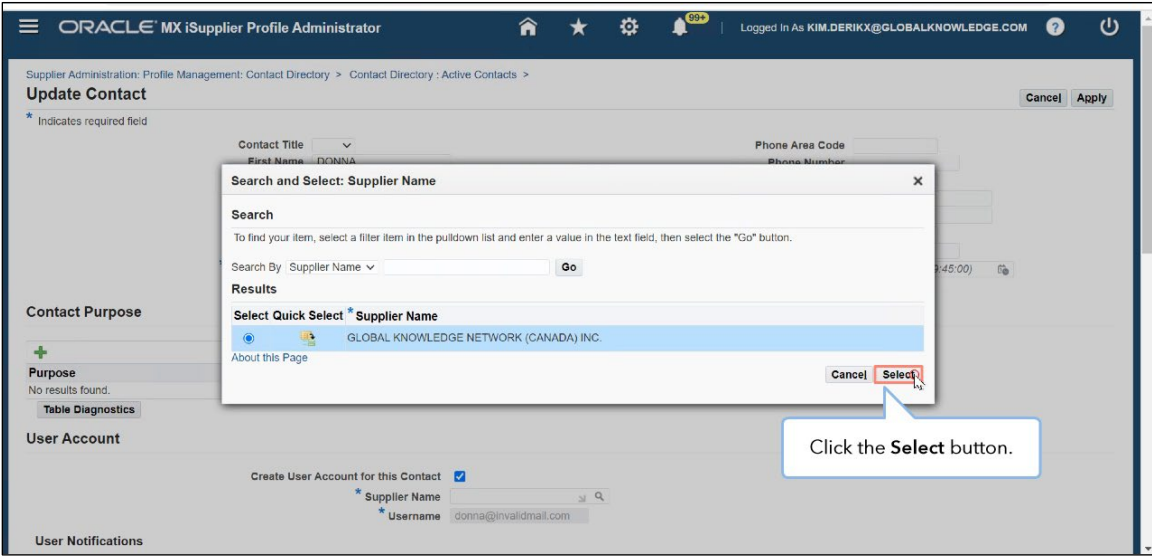
31.The **Search and Select: Supplier Name** pop-up box displays. Click the **Go** button to display the list of suppliers.



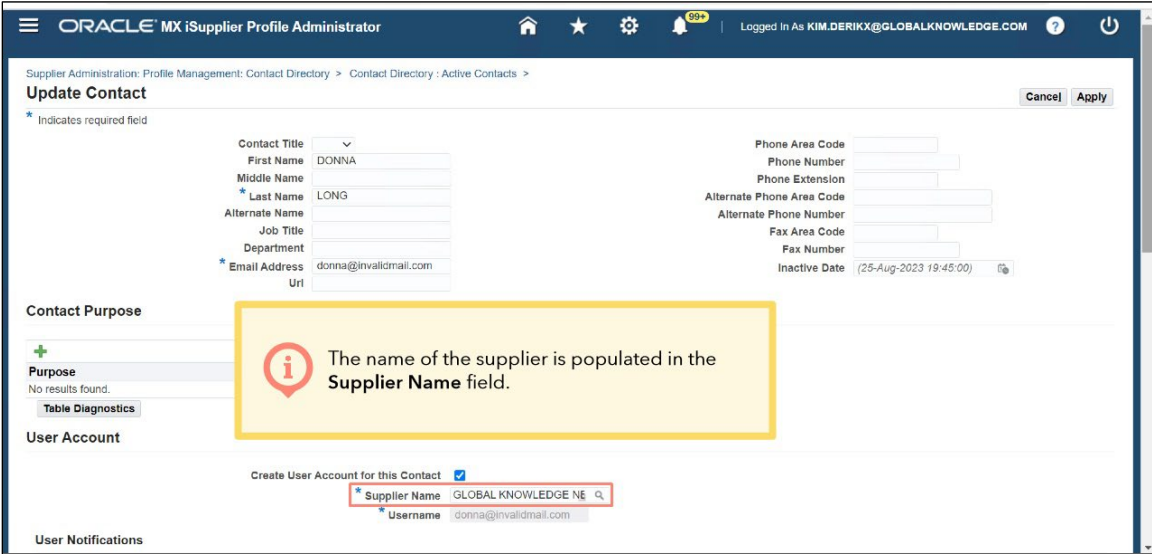
32.The name of your organization automatically displays. Click the radio button corresponding to the supplier name.



33. Click the **Select** button.



34. The name of the supplier is populated in the **Supplier Name** field.



You can also edit the **Inactive Date** field, as needed. If a contact from your organization needs to be deactivated from iSupplier, you can use this field to enter the date after which the contact will be unable to log in using their iSupplier credentials.

Supplier Administration: Profile Management: Contact Directory > Contact Directory: Active Contacts >

**Update Contact** Cancel Apply

\* Indicates required field

Contact Title

First Name

Middle Name

\* Last Name

Alternate Name

Job Title

Department

\* Email Address

Uri

Phone Area Code

Phone Number

Phone Extension

Alternate Phone Area Code

Alternate Phone Number

Fax Area Code

Fax Number

Inactive Date

**Contact Purpose**

**Purpose**

No results found.

Table Diagnostics

**User Account**

Create User Account for this Contact ☒

\* Supplier Name

\* Username

**User Notifications**

35. Scroll down to view more details.

Supplier Administration: Profile Management: Contact Directory > Contact Directory: Active Contacts >

**Update Contact** Cancel Apply

\* Indicates required field

Contact Title

First Name

Middle Name

\* Last Name

Alternate Name

Job Title

Department

\* Email Address

Uri

Phone Area Code

Phone Number

Phone Extension

Alternate Phone Area Code

Alternate Phone Number

Fax Area Code

Fax Number

Inactive Date

**Contact Purpose**

**Purpose**

No results found.

Table Diagnostics

**User Account**

Create User Account for this Contact ☒

\* Supplier Name

\* Username

**User Notifications**

The **Responsibilities** section displays the list of roles assigned to the contact. You can also change the roles assigned, if required.

Responsibilities

Responsibility	Application
<input type="checkbox"/> MX iSupplier Portal Supplier PO Inv Admin	iSupplier Portal
<input type="checkbox"/> MX iSupplier Broker	iSupplier Portal
<input type="checkbox"/> MX iSupplier Portal Supplier Inv Admin	iSupplier Portal
<input checked="" type="checkbox"/> MX iSupplier Profile Administrator	iSupplier Portal

Table Diagnostics

The **Responsibilities** section displays the list of roles assigned to the contact.

- MX iSupplier Portal Supplier PO Inv Admin:** This option enables the selected contact to submit only PO-based invoices.
- MX iSupplier Broker:** This option enables the selected contact to submit non-PO invoices.
- MX iSupplier Portal Supplier Inv Admin:** This option enables the selected contact to submit PO-based as well as non-PO invoices.
- MX iSupplier Profile Administrator:** This option enables the selected contact to update the vendor details in the system and add or deactivate other contacts from the iSupplier Contact Directory.

You can also change the roles assigned, if required.

Access not restricted by Supplier Contact.

Further down the page, you can restrict access for the contact in iSupplier by editing the **Site Restriction** section. If you do not restrict a contact by site, the contact will have access to all the sites linked to your organization’s profile.

Responsibilities

Responsibility	Application
<input type="checkbox"/> MX iSupplier Portal Supplier PO Inv Admin	iSupplier Portal
<input type="checkbox"/> MX iSupplier Broker	iSupplier Portal
<input type="checkbox"/> MX iSupplier Portal Supplier Inv Admin	iSupplier Portal
<input checked="" type="checkbox"/> MX iSupplier Profile Administrator	iSupplier Portal

Table Diagnostics

Further down the page, you can restrict access for the contact in iSupplier by editing the **Site Restriction** section. If you do not restrict a contact by site, the contact will have access to all the sites linked to your organization’s profile.

Table Diagnostics

Site Restriction

Modify Sites

Supplier	Site	Operating Unit
Access not restricted by Supplier Site.		

Table Diagnostics

Contact Restriction

Modify Contacts

Supplier	Contact	Address
Access not restricted by Supplier Contact.		

36.To restrict the contact by site, click the **Modify Sites** button.

Responsibilities

Responsibility	Application
<input type="checkbox"/> MX iSupplier Portal Supplier PO Inv Admin	iSupplier Portal
<input type="checkbox"/> MX iSupplier Broker	iSupplier Portal
<input type="checkbox"/> MX iSupplier Portal Supplier Inv Admin	iSupplier Portal
<input checked="" type="checkbox"/> MX iSupplier Profile Administrator	iSupplier Portal

Table Diagnostics

User Access Restrictions

If no Supplier Sites or Contacts are specified, the user will be able to access all the data for this supplier.

Supplier Restriction

Suppliers

GLOBAL KNOWLEDGE NETWORK (CANADA) INC.

Table Diagnostics

Site Restriction

Modify Sites

Supplier

Access not restricted by Supplier site.

Table Diagnostics

Contact Restriction

Modify Contacts

Supplier	Contact	Address
Access not restricted by Supplier Contact.		

To restrict the contact by site, click the **Modify Sites** button.

37.The **Modify Site Restrictions** page displays. Select the site(s) that you want to assign to the contact.

ORACLE MX iSupplier Profile Administrator

Supplier Administration: Profile Management: Contact Directory > Update Contact >

Modify Site Restrictions

Search

Search Supplier Sites for Access Restrictions

Supplier Name

Site

Operating Unit

Go

Clear

Supplier Name	Site	Description	Operating Unit
<input type="checkbox"/> 11902997 O/A SENTINEL LUBRICANTS INC.	30 GAIL GR	30 GAIL GR	GO Transit
<input type="checkbox"/> 11902997 O/A SENTINEL LUBRICANTS INC.	7300 ST-JACQUES	7300 ST-JACQUES	GO Transit
<input type="checkbox"/> GLOBAL KNOWLEDGE NETWORK (CANADA) INC.	150YORKSTREET	150YORKSTREET	GO Transit
<input type="checkbox"/> GLOBAL KNOWLEDGE NETWORK (CANADA) INC.	2 Bloor St. E	2 Bloor St. E	GO Transit
<input type="checkbox"/> GLOBAL KNOWLEDGE NETWORK (CANADA) INC.	30 EGLINTON AVE	30 EGLINTON AVE	GO Transit
<input checked="" type="checkbox"/> GLOBAL KNOWLEDGE NETWORK (CANADA) INC.	150YORKSTREET	150YORKSTREET	GO Transit

Table Diagnostics

Diagnostic Console

The **Modify Site Restrictions** page displays. Select the site(s) that you want to assign to the contact.

38. Click the **Apply** button.

Supplier Administration: Profile Management: Contact Directory > Update Contact > **Modify Site Restrictions**

Search

Search Supplier Sites for Access Restrictions

Supplier Name  
Site  
Operating Unit

Go Clear

Supplier Name	Site	Description	Operating Unit
<input type="checkbox"/> 11902997 O/A SENTINEL LUBRICANTS INC.	30 GAIL GR	30 GAIL GR	GO Transit
<input type="checkbox"/> 11902997 O/A SENTINEL LUBRICANTS INC.	7300 ST-JACQUES	7300 ST-JACQUES	GO Transit
<input type="checkbox"/> GLOBAL KNOWLEDGE NETWORK (CANADA) INC.	150YORKSTREET	150YORKSTREET	GO Transit
<input type="checkbox"/> GLOBAL KNOWLEDGE NETWORK (CANADA) INC.	2 Bloor St. E	2 Bloor St. E	GO Transit
<input type="checkbox"/> GLOBAL KNOWLEDGE NETWORK (CANADA) INC.	30 EGLINTON AVE	30 EGLINTON AVE	GO Transit
<input checked="" type="checkbox"/> GLOBAL KNOWLEDGE NETWORK (CANADA) INC.	POB15872 STNA	POB15872 STNA	GO Transit

Table Diagnostics

Diagnostic Console

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39. The **Update Contact** page displays. Scroll down.

Supplier Administration: Profile Management: Contact Directory > Contact Directory : Active Contacts > **Update Contact**

Cancel Apply

\* Indicates required field

Contact Title  
First Name: DONNA  
Middle Name  
\* Last Name: LONG  
Alternate Name  
Job Title  
Department  
\* Email Address: donna@invalidmail.com  
Uri

Phone Area Code  
Phone Number  
Phone Extension  
Alternate Phone Area Code  
Alternate Phone Number  
Fax Area Code  
Fax Number

Contact Purpose

+ Purpose  
No results found.  
Delete  
Table Diagnostics

User Account

Create User Account for this Contact ☒

\* Supplier Name: GLOBAL KNOWLEDGE NE  
\* Username: donna@invalidmail.com

User Notifications

The **Update Contact** page displays. Scroll down.

40. Click the **Apply** button.

The screenshot shows the 'MX iSupplier Profile Administrator' interface. At the top, there are two tabs: 'MX iSupplier Portal Supplier Inv Admin' and 'MX iSupplier Profile Administrator'. The 'MX iSupplier Profile Administrator' tab is selected. Below the tabs, there is a 'Table Diagnostics' button. The main section is titled 'User Access Restrictions'. It contains a message: 'If no Supplier Sites or Contacts are specified, the user will be able to access all the data for this supplier.' Below this, there are three sections: 'Supplier Restriction', 'Site Restriction', and 'Contact Restriction'. Each section has a 'Table Diagnostics' button. The 'Contact Restriction' section is currently active, showing a table with columns 'Supplier', 'Contact', and 'Address'. A callout box with the text 'Click the Apply button.' points to the 'Apply' button at the bottom right of the interface.

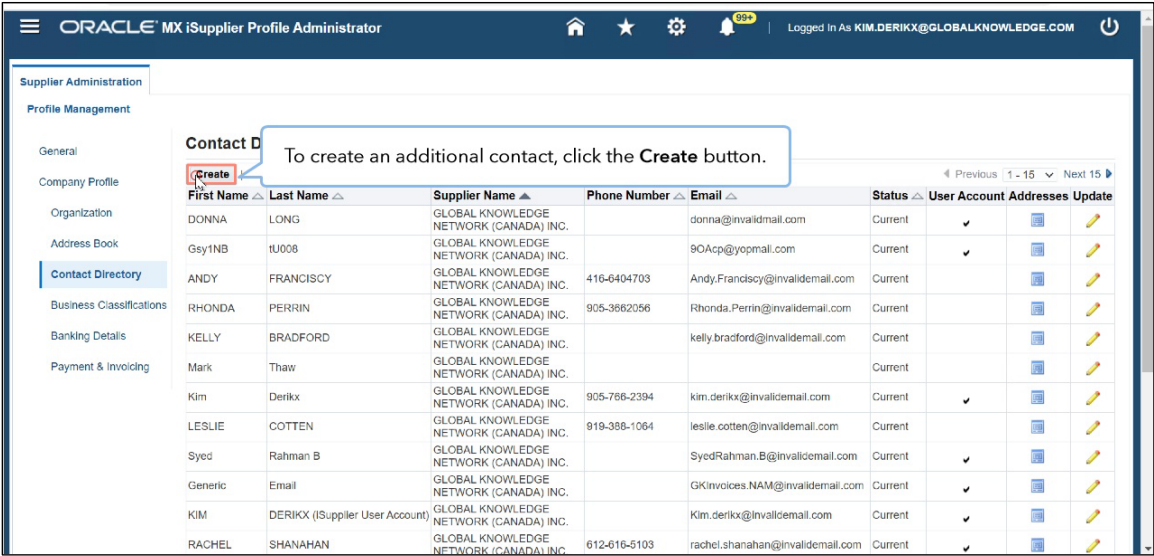
Now that an account has been set up for the contact, you will see a check mark against the User Account column for the contact.

Also note that the contact will receive an email notification, confirming their registration to iSupplier and asking them to reset their password. This password reset link will expire after 8 hours.

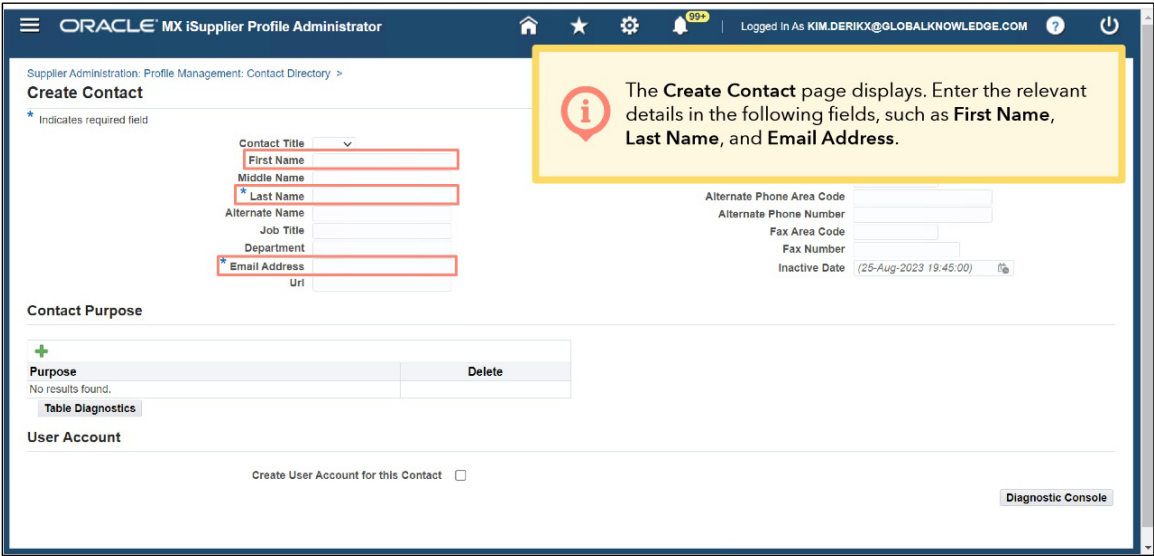
The screenshot shows the 'ORACLE MX iSupplier Profile Administrator' interface. The left sidebar contains a 'Supplier Administration' section with a 'Profile Management' sub-section. The main area is titled 'Contact Directory : Active Contacts'. It features a table with columns: 'First Name', 'Last Name', 'Supplier Name', 'Phone Number', 'Email', 'Status', 'User Account', 'Addresses', and 'Update'. The table contains several rows of contact information. A callout box with an information icon and text highlights the 'User Account' column, stating: 'Now that an account has been set up for the contact, you will see a check mark against the User Account column for the contact. Also note that the contact will receive an email notification, confirming their registration to iSupplier and asking them to reset their password. This password reset link will expire after 8 hours.'

First Name	Last Name	Supplier Name	Phone Number	Email	Status	User Account	Addresses	Update
DONNA	LONG	GLOBAL KNOWLEDGE NETWORK (CANADA) INC.		donna@invalidmail.com	Current	✓		
Gev1NR	11/01/08	GLOBAL KNOWLEDGE		80Aco@voonmail.com	Current			
KIM	DERIKX (iSupplier User Account)	GLOBAL KNOWLEDGE NETWORK (CANADA) INC.		Kim.derikx@invalidemail.com	Current	✓		
RACHEL	SHANAHAN	GLOBAL KNOWLEDGE NETWORK (CANADA) INC.	612-616-5103	rachel.shanahan@invalidemail.com	Current	✓		

41.To create an additional contact, click the **Create** button.



The **Create Contact** page displays. Enter the relevant details in the following fields, such as **First Name**, **Last Name**, and **Email Address**.



In this demonstration, the relevant fields are populated for you.

Supplier Administration: Profile Management: Contact Directory >

**Create Contact** Cancel Apply

\* Indicates required field

Contact Title   
First Name   
Middle Name   
\* Last Name   
Alternate Name   
Job Title   
Department   
\* Email Address   
Uri

Phone Area Code   
Phone Number   
Phone Extension   
Alternate Phone Area Code   
Alternate Phone Number   
Fax Area Code   
Fax Number   
Inactive Date (25-Aug-2023 19:45:00)

**Contact Purpose**

+ 

Purpose	Delete
No results found.	

Table Diagnostics

**User Account**

Create User Account for this Contact ☐

Diagnostic Console

42. Select the **Create User Account for this Contact** check box.

Supplier Administration: Profile Management: Contact Directory >

**Create Contact** Cancel Apply

\* Indicates required field

Contact Title   
First Name   
Middle Name   
\* Last Name   
Alternate Name   
Job Title   
Department   
\* Email Address   
Uri

Phone Area Code   
Phone Number   
Phone Extension   
Alternate Phone Area Code   
Alternate Phone Number   
Fax Area Code   
Fax Number   
Inactive Date (25-Aug-2023 19:45:00)

**Contact Purpose**

+ 

Purpose	Delete
No results found.	

Table Diagnostics

**User Account**

Create User Account for this Contact ☐

Diagnostic Console

On selecting the check box, the **Supplier Name** and **Username** fields are displayed.

In the **Username** field, the contact's email address is auto-populated based on the email entered in the **Email Address** field.

Supplier Administration: Profile Management: Contact Directory >

**Create Contact**

\* Indicates required field

Contact Title  
First Name JIM  
Middle Name  
\* Last Name HALPERT  
Alternate Name  
Job Title  
Department  
\* Email Address jmh@invalidmail.com  
Uri

On selecting the check box, the **Supplier Name** and **Username** fields are displayed.

In the **Username** field, the contact's email address is auto-populated based on the email entered in the **Email Address** field.

Inactive Date (25-Aug-2023 19:45:00)

**Contact Purpose**

+ Purpose Delete

No results found.

Table Diagnostics

**User Account**

Create User Account for this Contact ☒

\* Supplier Name  
\* Username jmh@invalidmail.com

User Notifications

43. As explained earlier, search and select the name of the supplier in the **Supplier Name** field.

Supplier Administration: Profile Management: Contact Directory >

**Create Contact**

\* Indicates required field

Contact Title  
First Name JIM  
Middle Name  
\* Last Name HALPERT  
Alternate Name  
Job Title  
Department  
\* Email Address jmh@invalidmail.com  
Uri

Phone Area Code  
Phone Number  
Phone Extension  
Alternate Phone Area Code  
Alternate Phone Number  
Fax Area Code  
Fax Number  
Inactive Date (25-Aug-2023 19:45:00)

As explained earlier, search and select the name of the supplier in the **Supplier Name** field.

Cancel Apply

**Contact Purpose**

+ Purpose Delete

No results found.

Table Diagnostics

**User Account**

Create User Account for this Contact ☒

\* Supplier Name GLOBAL KNOWLEDGE NE  
\* Username jmh@invalidmail.com

User Notifications

44.Scroll down to view more details

ORACLE MX iSupplier Profile Administrator

Home Star Settings 99+ | Logged In As KIM.DERIKX@GLOBALKNOWLEDGE.COM ? Power

Supplier Administration: Profile Management: Contact Directory >

Create Contact

Cancel Apply

\* Indicates required field

Contact Title

First Name 

JIM

Middle Name

\* Last Name 

HALPERT

Alternate Name

Job Title

Department

\* Email Address 

jmh@invalidmail.com

Uri

Phone Area Code

Phone Number

Phone Extension

Alternate Phone Area Code

Alternate Phone Number

Fax Area Code

Scroll down to view more details.

Contact Purpose

+

Purpose	Delete
No results found.	

Table Diagnostics

User Account

Create User Account for this Contact ☒

\* Supplier Name 

GLOBAL KNOWLEDGE NB

\* Username 

jmh@invalidmail.com

User Notifications

The **MX iSupplier Profile Administrator** role is selected by default. You can update the roles, if required.

☐ MX iSupplier Portal Supplier Inv Admin

iSupplier Portal

☒ MX iSupplier Profile Administrator

iSupplier Portal

Table Diagnostics

User Access

If no Supplier

Supplier Restriction

Suppliers

GLOBAL KN

Table Diagnostics

Site Restriction

Modify Sites

Supplier	Site	Operating Unit
Access not restricted by Supplier Site.		

Table Diagnostics

Contact Restriction

Modify Contacts

Supplier	Contact	Address
Access not restricted by Supplier Contact.		

Table Diagnostics

The MX iSupplier Profile Administrator role is selected by default. You can update the roles, if required.

Diagnostic Console

Cancel Apply

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As explained earlier, you can restrict access for the contact in iSupplier by editing the **Site Restriction** section.

☐ MX iSupplier Portal Supplier Inv Admin

☒ MX iSupplier Profile Administrator

iSupplier Portal

iSupplier Portal

Table Diagnostics

User Access Restrictions

If no Supplier Sites or Contacts are specified, the user will be able to access all the data for this supplier.

Supplier Restriction

Suppliers

GLOBAL KNOWLEDGE NETWORK (CANADA) INC.

Table Diagnostics

Site Restriction

Modify Sites

Supplier	Site	Operating Unit
Access not restricted by Supplier Site.		

Table Diagnostics

Contact Restriction

Modify Contacts

Supplier	Contact	Address
Access not restricted by Supplier Contact.		

Table Diagnostics

Diagnostic Console

Cancel

Apply

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45. Click the **Apply** button.

☐ MX iSupplier Portal Supplier Inv Admin

☒ MX iSupplier Profile Administrator

iSupplier Portal

iSupplier Portal

Table Diagnostics

User Access Restrictions

If no Supplier Sites or Contacts are specified, the user will be able to access all the data for this supplier.

Supplier Restriction

Suppliers

GLOBAL KNOWLEDGE NETWORK (CANADA) INC.

Table Diagnostics

Site Restriction

Modify Sites

Supplier	Site	Operating Unit
Access not restricted by Supplier Site.		

Table Diagnostics

Contact Restriction

Modify Contacts

Supplier	Contact	Address
Access not restricted by Supplier Contact.		

Table Diagnostics

Diagnostic Console

Cancel

Apply

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The new contact is now added.

Note that the contact will receive an email notification, confirming their registration to iSupplier and asking them to reset their password. This password reset link will expire after 8 hours.

Supplier Administration

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Business Classification

Banking Details

Payment & Invoicing

Contact Directory : Active Contacts

Create

First NameLast NameSupplier NamePhone NumberEmailStatusUser AccountAddressesUpdate

DONNALONGGLOBAL KNOWLEDGE NETWORK (CANADA) INC.donna@invalidmail.comCurrent✓

JIMHALPERTGLOBAL KNOWLEDGE NETWORK (CANADA) INCjimh@invalidmail.comCurrent✓

ANDYFRANCISCYGLOBAL KNOWLEDGE NETWORK (CANADA) INC416-6404703Andy.Franciscy@invalidemail.comCurrent

GenericEmailGLOBAL KNOWLEDGE NETWORK (CANADA) INC.GKInvoices.NAM@invalidemail.comCurrent✓

KIMDERIKX (iSupplier User Account)GLOBAL KNOWLEDGE NETWORK (CANADA) INC.Kim.derikx@invalidemail.comCurrent✓

RACHELSHANAHANGLOBAL KNOWLEDGE NETWORK (CANADA) INC.612-616-5103rachel.shanahan@invalidemail.comCurrent✓

The new contact is now added.

Note that the contact will receive an email notification, confirming their registration to iSupplier and asking them to reset their password. This password reset link will expire after 8 hours.

46. Click the **Business Classifications** section.

Supplier Administration

Profile Management

General

Company Profile

Organization

Address Book

Contact Directory

Business Classifications

Banking Details

Payment & Invoicing

Contact Directory : Active Contacts

Create

First NameLast NameSupplier NamePhone NumberEmailStatusUser AccountAddressesUpdate

DONNALONGGLOBAL KNOWLEDGE NETWORK (CANADA) INC.donna@invalidmail.comCurrent✓

JIMHALPERTGLOBAL KNOWLEDGE NETWORK (CANADA) INCjimh@invalidmail.comCurrent✓

ANDYANDYFRANCISCYGLOBAL KNOWLEDGE NETWORK (CANADA) INC416-6404703Andy.Franciscy@invalidemail.comCurrent

RHONDARHONDA Perrin@invalidemail.comCurrent

KELLYBRADFORDGLOBAL KNOWLEDGE NETWORK (CANADA) INC.kelly.bradford@invalidemail.comCurrent

MarkThawGLOBAL KNOWLEDGE NETWORK (CANADA) INC.905-766-2394kim.derikx@invalidemail.comCurrent✓

KimDerikxGLOBAL KNOWLEDGE NETWORK (CANADA) INC.919-388-1064leslie.cotten@invalidemail.comCurrent

LESJIECOTTENGLOBAL KNOWLEDGE NETWORK (CANADA) INC.919-388-1064SyedRahman.B@invalidemail.comCurrent✓

SyedRahman.BGLOBAL KNOWLEDGE NETWORK (CANADA) INC.GKInvoices.NAM@invalidemail.comCurrent✓

GenericEmailGLOBAL KNOWLEDGE NETWORK (CANADA) INC.GKInvoices.NAM@invalidemail.comCurrent✓

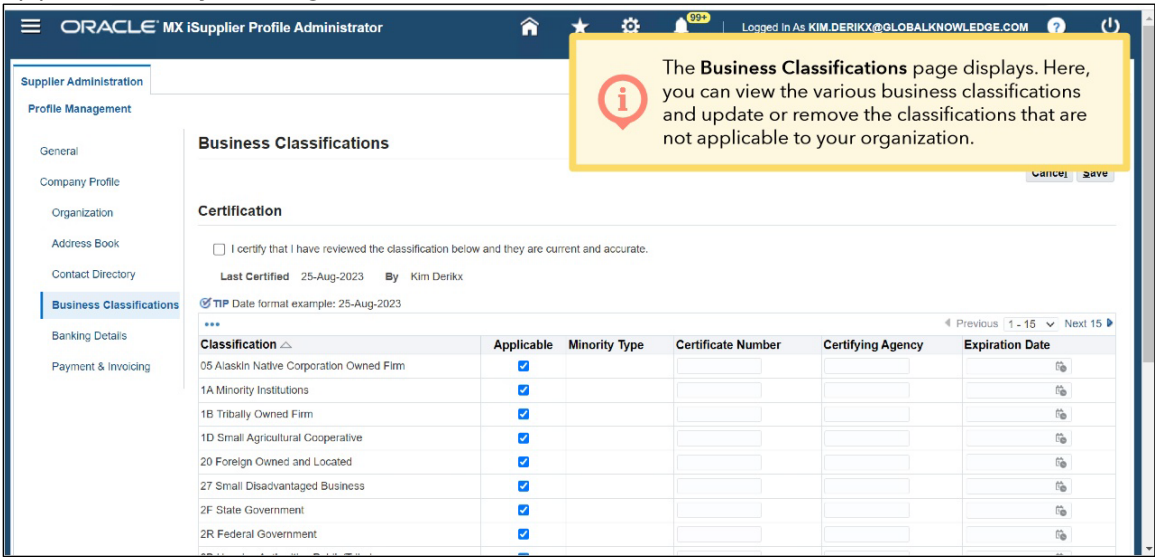
KIMDERIKX (iSupplier User Account)GLOBAL KNOWLEDGE NETWORK (CANADA) INC.Kim.derikx@invalidemail.comCurrent✓

RACHELSHANAHANGLOBAL KNOWLEDGE NETWORK (CANADA) INC.612-616-5103rachel.shanahan@invalidemail.comCurrent✓

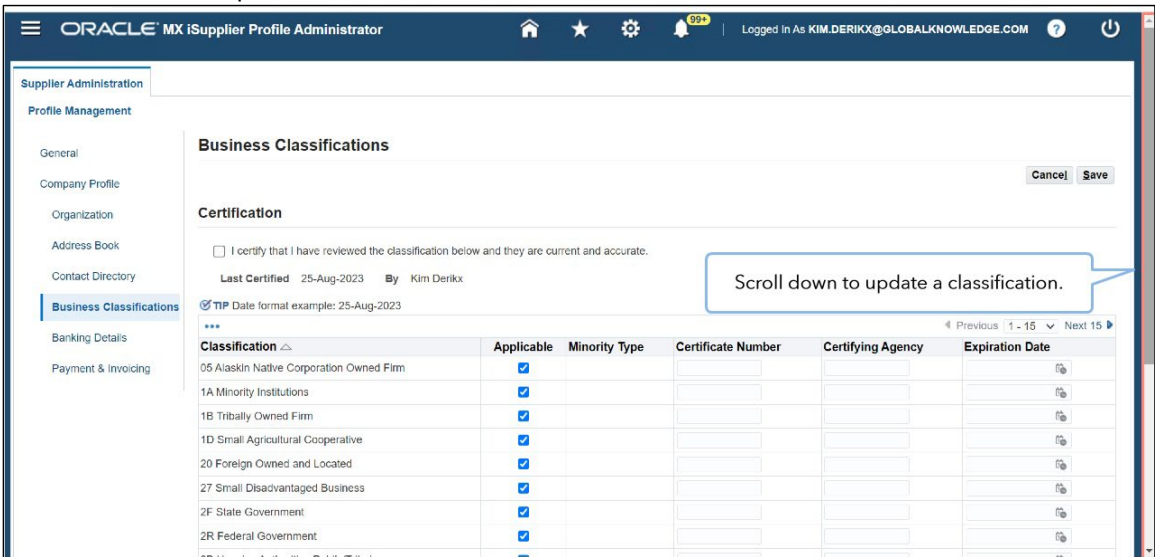
Click the Business Classifications section.

Page 42 of 60

The **Business Classifications** page displays. Here, you can view the various business classifications and update or remove the classifications that are not applicable to your organization.



47. Scroll down to update a classification.



48. Select the **Applicable** check box. In this demonstration, select the check box corresponding to the **12 Local Government** option.

Business Classifications

Banking Details

Payment & Invoicing

\*\*\*  
Date format example: 20-Aug-2023  
Previous 1 - 15 Next 15

Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
05 Alaskan Native Corporation Owned Firm	<input checked="" type="checkbox"/>				
1A Minority Institutions	<input checked="" type="checkbox"/>				
1B Tribally Owned Firm	<input checked="" type="checkbox"/>				
1D Small Agricultural Cooperative	<input checked="" type="checkbox"/>				
20 Foreign Owned and Located	<input checked="" type="checkbox"/>				
27 Small Disadvantaged Business	<input checked="" type="checkbox"/>				
2F State Government	<input checked="" type="checkbox"/>				
2R Federal Government	<input checked="" type="checkbox"/>				
8B Housing Authorities Public/Tribal	<input checked="" type="checkbox"/>				
Women Owned	<input checked="" type="checkbox"/>				
XY Indian Tribe (Federally Recognized)	<input checked="" type="checkbox"/>				
ZR Inter-municipal	<input checked="" type="checkbox"/>				
ZW School of Forestry	<input checked="" type="checkbox"/>				
12 Local Government	<input checked="" type="checkbox"/>				
2U Other Not for Profit Organization	<input type="checkbox"/>				

Table Diagnostics

Cancel Save  
Diagnostic Console

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Select the **Applicable** check box. In this demonstration, select the check box corresponding to the **12 Local Government** option.

49. Click the **Save** button.

Business Classifications

Banking Details

Payment & Invoicing

\*\*\*  
Date format example: 20-Aug-2023  
Previous 1 - 15 Next 15

Classification	Applicable	Minority Type	Certificate Number	Certifying Agency	Expiration Date
05 Alaskan Native Corporation Owned Firm	<input checked="" type="checkbox"/>				
1A Minority Institutions	<input checked="" type="checkbox"/>				
1B Tribally Owned Firm	<input checked="" type="checkbox"/>				
1D Small Agricultural Cooperative	<input checked="" type="checkbox"/>				
20 Foreign Owned and Located	<input checked="" type="checkbox"/>				
27 Small Disadvantaged Business	<input checked="" type="checkbox"/>				
2F State Government	<input checked="" type="checkbox"/>				
2R Federal Government	<input checked="" type="checkbox"/>				
8B Housing Authorities Public/Tribal	<input checked="" type="checkbox"/>				
Women Owned	<input checked="" type="checkbox"/>				
XY Indian Tribe (Federally Recognized)	<input checked="" type="checkbox"/>				
ZR Inter-municipal	<input checked="" type="checkbox"/>				
ZW School of Forestry	<input checked="" type="checkbox"/>				
12 Local Government	<input checked="" type="checkbox"/>				
2U Other Not for Profit Organization	<input type="checkbox"/>				

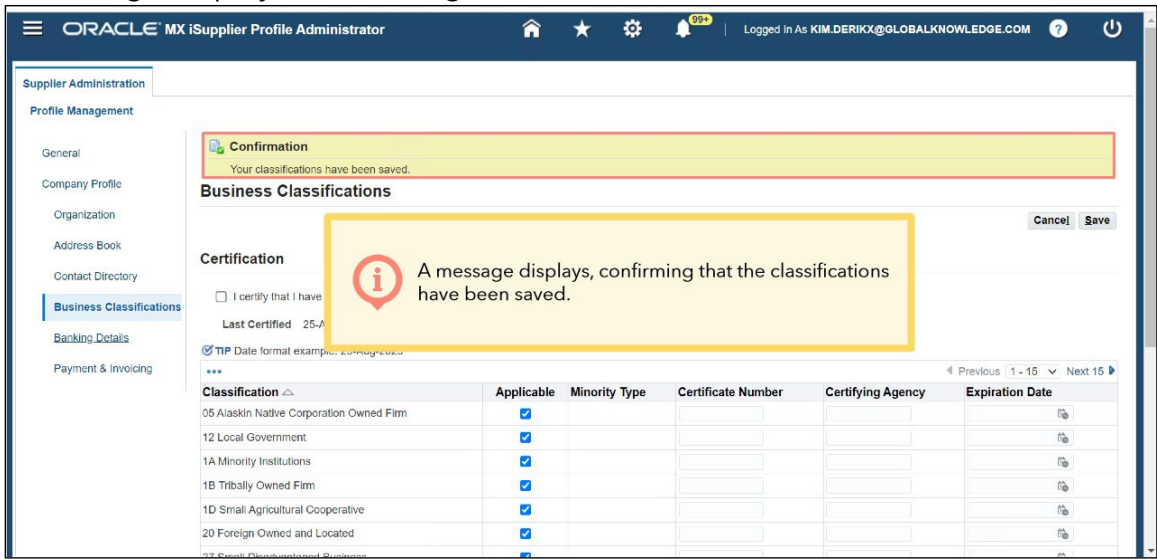
Table Diagnostics

Cancel Save  
Diagnostic Console

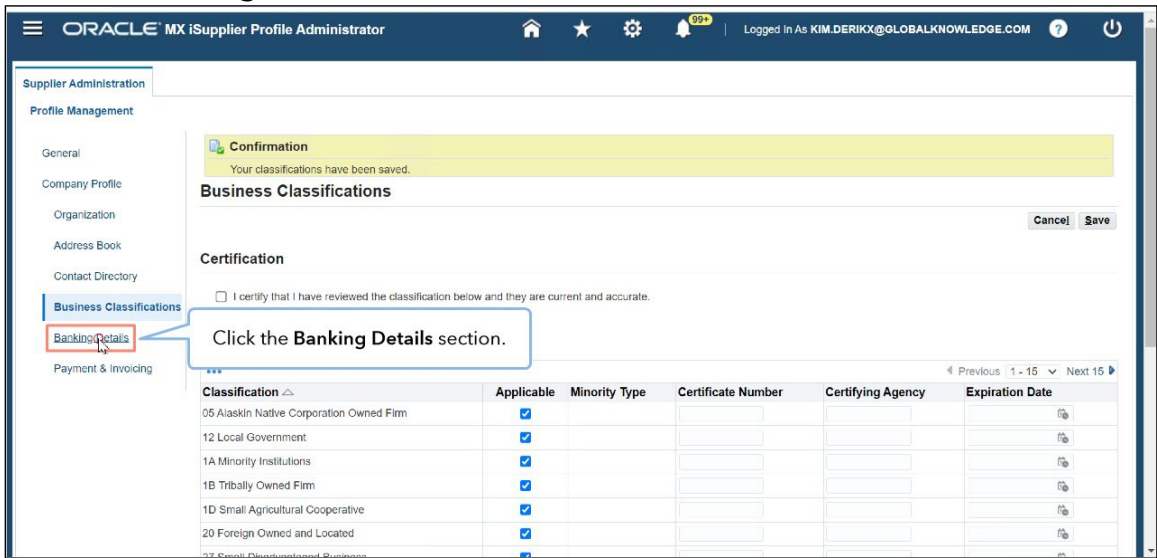
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Click the **Save** button.

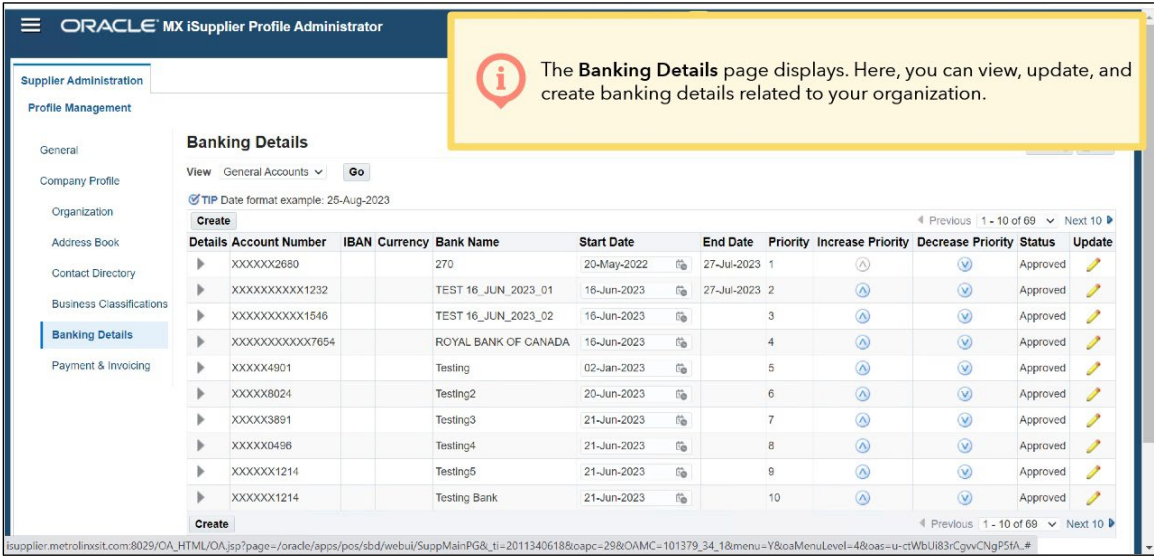
A message displays, confirming that the classifications have been saved.



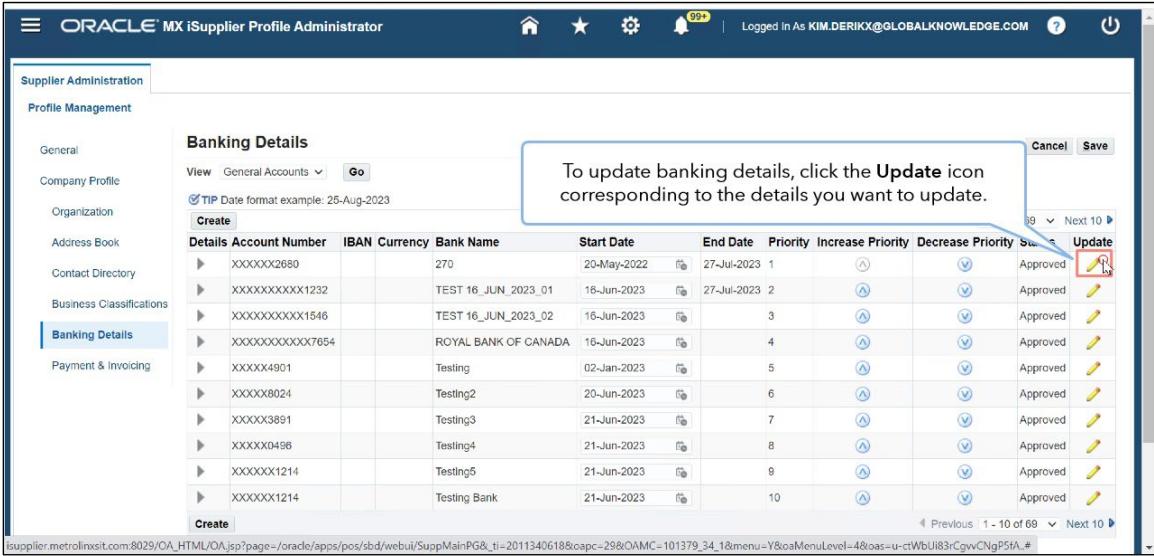
50. Click the **Banking Details** section.



The **Banking Details** page displays. Here, you can view, update, and create banking details related to your organization.



51.To update banking details, click the **Update** icon corresponding to the details you want to update.



The **Update Bank Account** page displays. Here, you can update the fields, as needed. Note that only a few fields on this page can be updated; for example, the **End Date** field.

ORACLE MX iSupplier Profile Administrator

Supplier Administration: Profile Management: Banking Details >  
Update Bank Account

Country

Bank

Bank Name ROYAL BANK OF CANADA  
Bank Number 00320  
Tax Payer ID  
[Show Bank Details](#)

Branch

Branch Name BURNABY BC MAIN BR.  
Branch Number 003  
BIC ROYCCAT2  
Branch Type ABA  
[Show Branch Details](#)

Bank Account

Account Number XXXXXXXXXXXX7654  
Check Digits  
IBAN

Account Name TEST BANK AC ARC  
Currency  
Account Status Approved

Attachments\*

TIP "Please upload Attachment. Attachment is mandatory"

I confirm that the attachments have been uploaded.

Comments

52. To update the **End Date** field, click the **Show Account Details** link.

ORACLE MX iSupplier Profile Administrator

Supplier Administration: Profile Management: Banking Details >  
Update Bank Account

Country Canada  
☒ Account is used for foreign payments  
Account definition must include bank and branch information.

Bank

Bank Name ROYAL BANK OF CANADA  
Bank Number 00320  
Tax Payer ID  
[Show Bank Details](#)

Branch

Branch Name BURNABY BC MAIN BR.  
Branch Number 003  
BIC ROYCCAT2  
Branch Type ABA  
[Show Branch Details](#)

Bank Account

Account Number XXXXXXXXXXXX7654  
Check Digits  
IBAN

Account Name TEST BANK AC ARC  
Currency  
Account Status Approved

Attachments\*

TIP "Please upload Attachment. Attachment is mandatory"

I confirm that the attachments have been uploaded.

Comments

The account details are displayed.

Bank NameROYAL BANK OF CANADA  
Bank Number00320  
Tax Payer ID

Branch NameBURNABY BC MAIN BR.  
Branch Number003  
BICROYCCAT2  
Branch TypeABA

The account details are displayed.

Show Branch Details

Account NameTEST BANK AC ARC  
Currency  
Account StatusApproved

Hide Account Details

Details

Alternate Account Name  
Account Suffix  
Agency Location Code

Account Type  
Description  
End Date(25-Aug-2023)

Attachments

TIP "Please upload Attachment. Attachment is mandatory"

I confirm that the attachments have been uploaded.

Comments

Note from BuyerNone  
Note to Buyer

Documents

supplier.metrolinx.com:8029/OA\_HTML/OA.jsp?page=/oracle/apps/pos/sbd/webui/SuppMainPG&amp;\_ti=20113406188/OAMC=101379\_34\_1&amp;menu=Y&amp;oaMenuLevel=4&amp;oapc=30&amp;oas=IN8F26QDu-J4GaexnaXocw.#

53. Enter the appropriate date in the **End Date** field.

Bank NameROYAL BANK OF CANADA  
Bank Number00320  
Tax Payer ID

Branch NameBURNABY BC MAIN BR.  
Branch Number003  
BICROYCCAT2  
Branch TypeABA

Show Bank Details

Show Branch Details

Bank Account

Account NumberXXXXXXXXXX7654  
Check Digits  
IBAN

Account NameTEST BANK AC ARC  
Currency  
Account StatusApproved

Hide Account Details

Details

Alternate Account Name  
Agency Location Code

Account Type  
Description  
End Date(25-Aug-2023)

Attachments

TIP "Please upload Attachment. Attachment is mandatory"

I confirm that the attachments have been uploaded.

Comments

Note from BuyerNone  
Note to Buyer

Documents

supplier.metrolinx.com:8029/OA\_HTML/OA.jsp?page=/oracle/apps/pos/sbd/webui/SuppMainPG&amp;\_ti=20113406188/OAMC=101379\_34\_1&amp;menu=Y&amp;oaMenuLevel=4&amp;oapc=30&amp;oas=IN8F26QDu-J4GaexnaXocw.#

Note that this field only needs to be updated in case you are deactivating the existing bank account.

Bank NameROYAL BANK OF CANADA

Bank Number00320

Tax Payer ID

Show Bank Details

Branch NameBURNABY BC MAIN BR.

Branch Number003

BICROYCCAT2

Branch TypeABA

Show Branch Details

Bank Account

Account NumberXXXXXXXXXX7654

Check DigitsIBAN

Account NameTEST BANK AC ARC

Currency

Account StatusApproved

Hide Account Details

Details

Alternate Account Name

Account Suffix

Agency Location Code

Account Type

Description

End Date30-Aug-2023

Attachments\*

TIP "Please upload Attachment. Attachment is mandatory"

☒ I confirm that the attachments have been uploaded.

Comments

Note from BuyerNone

Note to Buyer

Documents

Note that this field only needs to be updated in case you are deactivating the existing bank account.

54. Enter any notes to the buyer, if required.

Bank NameROYAL BANK OF CANADA

Bank Number00320

Tax Payer ID

Show Bank Details

Branch NameBURNABY BC MAIN BR.

Branch Number003

BICROYCCAT2

Branch TypeABA

Show Branch Details

Bank Account

Account NumberXXXXXXXXXX7654

Check DigitsIBAN

Account NameTEST BANK AC ARC

Currency

Account StatusApproved

Hide Account Details

Details

Alternate Account Name

Account Suffix

Agency Location Code

Account Type

Description

End Date30-Aug-2023

Attachments\*

TIP "Please upload Attachment. Attachment is mandatory"

☒ I confirm that the attachments have been uploaded.

Comments

Note from BuyerNone

Note to BuyerUpdated end date to 30-Aug-2023.

Documents

Enter any notes to the buyer, if required.

55.Scroll down to save the changes.

Bank NameROYAL BANK OF CANADA

Bank Number00320

Tax Payer ID

Branch NameBURNABY BC MAIN BR.

Branch Number003

BICROYCCAT2

Branch TypeABA

Show Bank Details

Show Branch Details

Bank Account

Account NumberXXXXXXXXXX7654

Check Digits

IBAN

Account NameTEST BANK AC ARC

Currency

Account StatusApproved

Hide Account Details

Details

Alternate Account Name

Account Suffix

Agency Location Code

Account Type

Description

End Date30-Aug-2023

Attachments\*

TIP "Please upload Attachment. Attachment is mandatory"

I confirm that the attachments have been uploaded.

Comments

Note from BuyerNone

Note to BuyerUpdated end date to 30-Aug-2023.

Documents

Scroll down to save the changes

56.Click the **Save** button.

Bank Account

Account NumberXXXXXXXXXX7654

Check Digits

IBAN

Account NameTEST BANK AC ARC

Currency

Account StatusApproved

Hide Account Details

Details

Alternate Account Name

Account Suffix

Agency Location Code

Account Type

Description

End Date30-Aug-2023

Attachments\*

TIP "Please upload Attachment. Attachment is mandatory"

I confirm that the attachments have been uploaded.

Comments

Note from BuyerNone

Note to BuyerUpdated end date to 30-Aug-2023.

Documents

Click the **Save** button.

Diagnostic Console

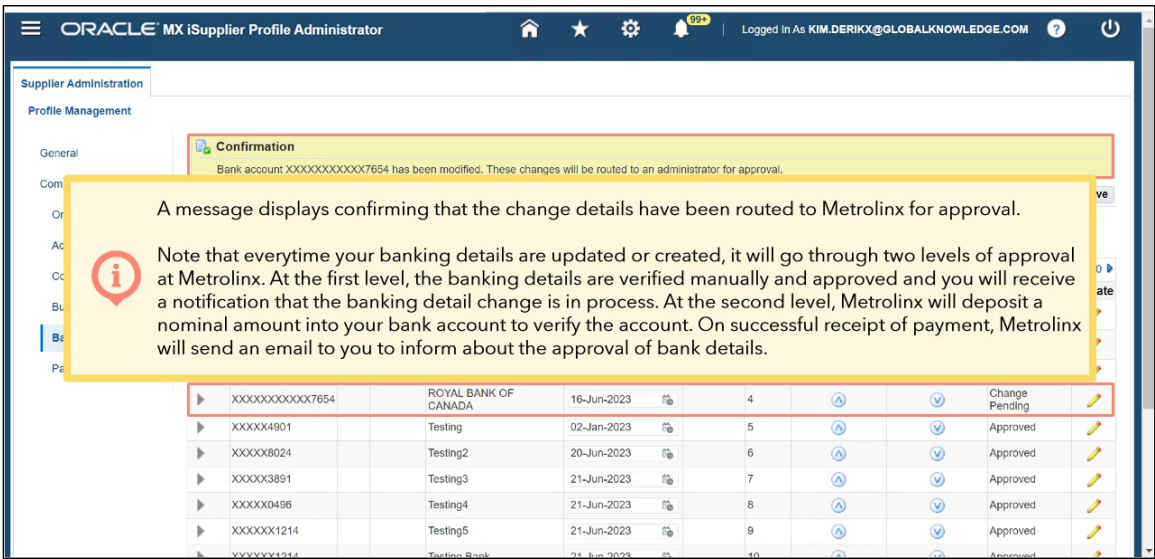
CancelSave

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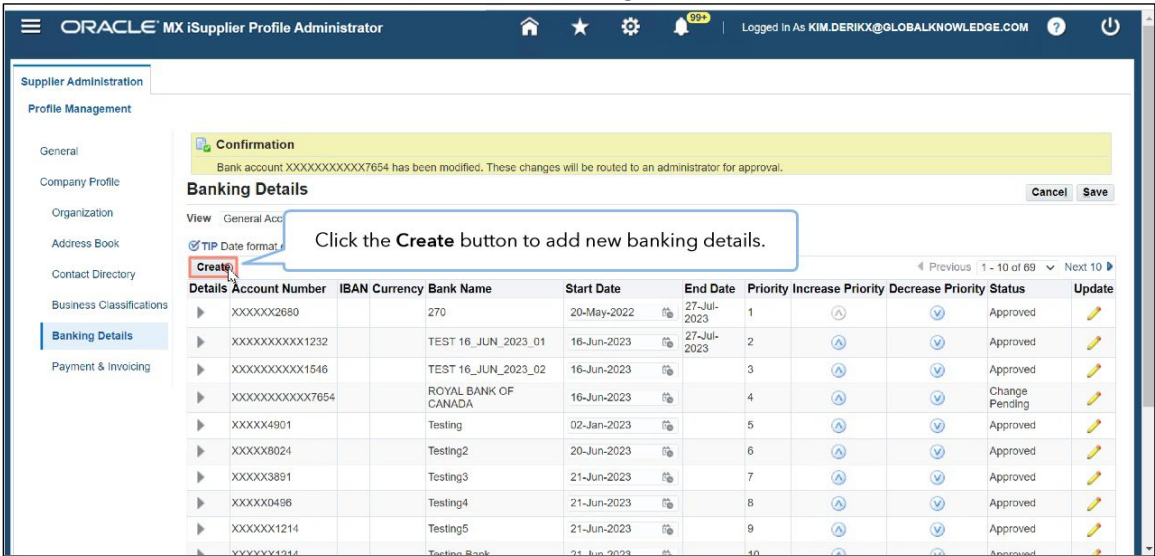
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A message displays confirming that the change details have been routed to Metrolinx for approval.

Note that every time your banking details are updated or created, it will go through two levels of approval at Metrolinx. At the first level, the banking details are verified manually and approved, and you will receive a notification that the banking detail change is in process. At the second level, Metrolinx will deposit a nominal amount into your bank account to verify the account. Upon successful receipt of payment, Metrolinx will send an email to you to inform you about the approval of bank details.

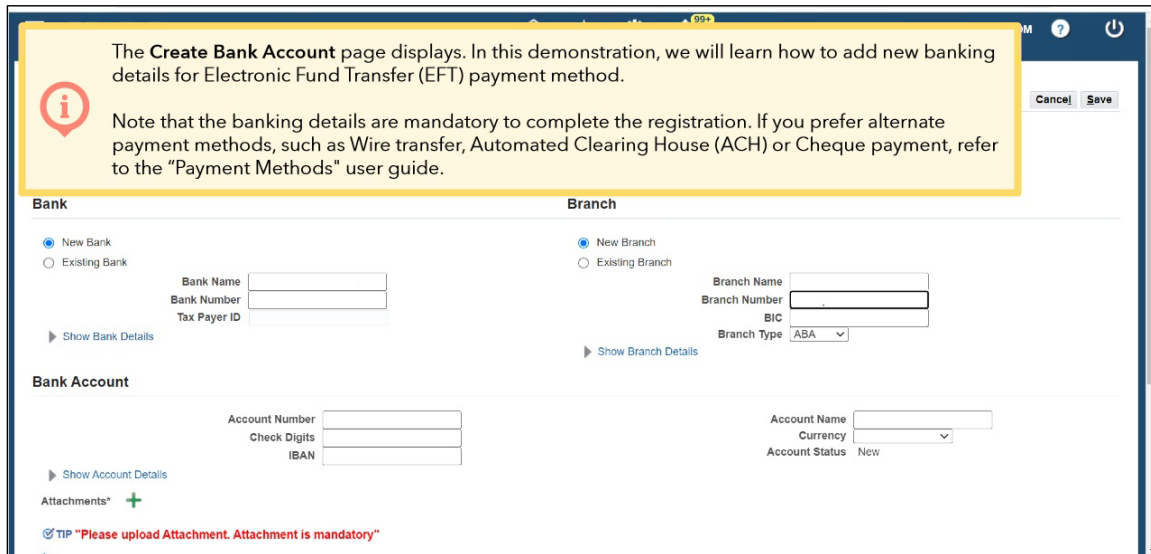


57. Click the **Create** button to add new banking details.



The **Create Bank Account** page displays. In this demonstration, we will learn how to add new banking details for the Electronic Fund Transfer (EFT) mode of payment.

Note that the banking details are mandatory to complete the registration. If you prefer alternate modes of payment such as Wire transfer, Automated Clearing House (ACH), or Cheque payment, refer to the "Payment Methods" user guide.



The **Create Bank Account** page displays. In this demonstration, we will learn how to add new banking details for Electronic Fund Transfer (EFT) payment method.

Note that the banking details are mandatory to complete the registration. If you prefer alternate payment methods, such as Wire transfer, Automated Clearing House (ACH) or Cheque payment, refer to the "Payment Methods" user guide.

**Bank**

☒ New Bank  
☐ Existing Bank

Bank Name   
 Bank Number   
 Tax Payer ID

[Show Bank Details](#)

**Branch**

☒ New Branch  
☐ Existing Branch

Branch Name   
 Branch Number   
 BIC   
 Branch Type

[Show Branch Details](#)

**Bank Account**

Account Number   
 Check Digits   
 IBAN

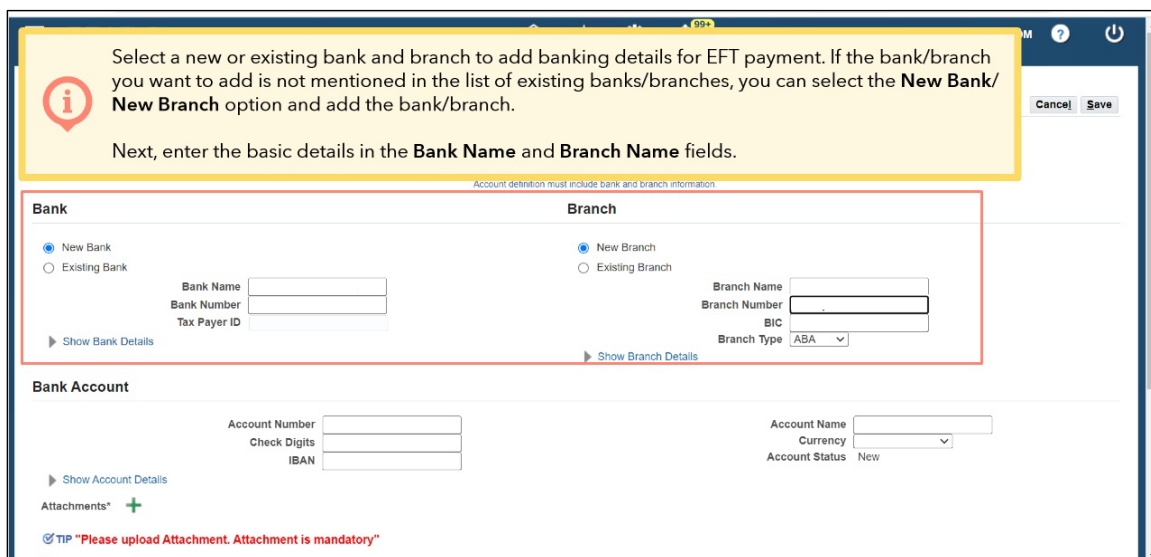
[Show Account Details](#)

Account Name   
 Currency   
 Account Status

Attachments\* [+](#)

**TIP** "Please upload Attachment. Attachment is mandatory"

Select a new or existing bank and branch to add banking details for EFT payment. If the bank/branch you want to add is not mentioned in the list of existing banks/branches, you can select the **New Bank/New Branch** option and add the bank/branch. Next, enter the basic details in the **Bank Name** and **Branch Name** fields.



Select a new or existing bank and branch to add banking details for EFT payment. If the bank/branch you want to add is not mentioned in the list of existing banks/branches, you can select the **New Bank/New Branch** option and add the bank/branch.

Next, enter the basic details in the **Bank Name** and **Branch Name** fields.

**Bank**

☒ New Bank  
☐ Existing Bank

Bank Name   
 Bank Number   
 Tax Payer ID

[Show Bank Details](#)

**Branch**

☒ New Branch  
☐ Existing Branch

Branch Name   
 Branch Number   
 BIC   
 Branch Type

[Show Branch Details](#)

**Bank Account**

Account Number   
 Check Digits   
 IBAN

[Show Account Details](#)

Account Name   
 Currency   
 Account Status

Attachments\* [+](#)

**TIP** "Please upload Attachment. Attachment is mandatory"

In this demonstration, the relevant fields are populated for you.

**Note:** The **Bank Number** and **Branch Number** fields are auto-populated based on the bank or branch selected.

This screenshot shows the 'Create Bank Account' form in the Oracle MX iSupplier Profile Administrator. A yellow callout box with an information icon contains the text: 'In this demonstration, the relevant fields are populated for you. Note that the **Bank Number** and **Branch Number** fields are auto-populated based on the bank or branch selected.' The form is divided into three main sections: 'Bank', 'Branch', and 'Bank Account'. The 'Bank' section has radio buttons for 'New Bank' (selected) and 'Existing Bank', with fields for 'Bank Name' (State Bank of Canada), 'Bank Number' (004), and 'Tax Payer ID'. The 'Branch' section has radio buttons for 'New Branch' (selected) and 'Existing Branch', with fields for 'Branch Name' (Main Branch), 'Branch Number' (00029), 'BIC', and 'Branch Type' (ABA). The 'Bank Account' section has fields for 'Account Number', 'Check Digits', 'IBAN', 'Account Name', 'Currency' (dropdown), and 'Account Status' (New). A red tip at the bottom says: 'Please upload Attachment. Attachment is mandatory'.

58. Enter the account number in the **Account Number** field.

This screenshot shows the same 'Create Bank Account' form, but with the 'Account Number' field populated with the value '796433541'. A blue callout box with a speech bubble points to the 'Account Number' field and contains the text: 'Enter the account number in the **Account Number** field.' The rest of the form, including the 'Bank' and 'Branch' sections, remains the same as in the previous screenshot.

In this example, let's continue with the options selected for EFT mode of payment.

59.Scroll down to add more details.

ORACLE MX iSupplier Profile Administrator

Cancel Save

In this example, let's continue with the options selected for EFT mode of payment.

Bank

New Bank  
Existing Bank

Bank Name State Bank of Canada  
Bank Number 004  
Tax Payer ID

Show Bank Details

Branch

New Branch  
Existing Branch

BIC  
Branch Type ABA

Show Branch Details

Bank Account

Account Number 796433541  
Check Digits  
IBAN

Account Name  
Currency  
Account Status New

Show Account Details

Attachments\* +

TIP "Please upload Attachment. Attachment is mandatory"

Once you add a new bank account, you must attach the relevant supporting documents such as void cheques, etc.

**Note:** Metrolinx requires the supporting documents to be uploaded in order to review the newly added bank account.

60.To attach supporting documents, click the **Plus** icon.

Existing Bank  
Existing Branch

Bank Name State Bank of Canada  
Bank Number 004  
Tax Payer ID

Show Bank Details

Branch Name Main Branch  
Branch Number 00029  
Branch Type ABA

Show Branch Details

Bank Account

Account Number  
Check Digits  
IBAN

Account Name  
Currency  
Account Status New

Show Account Details

Attachments\* +

TIP "Please upload Attachment"

I confirm that the attachments have been uploaded.

Comments

Note to Buyer

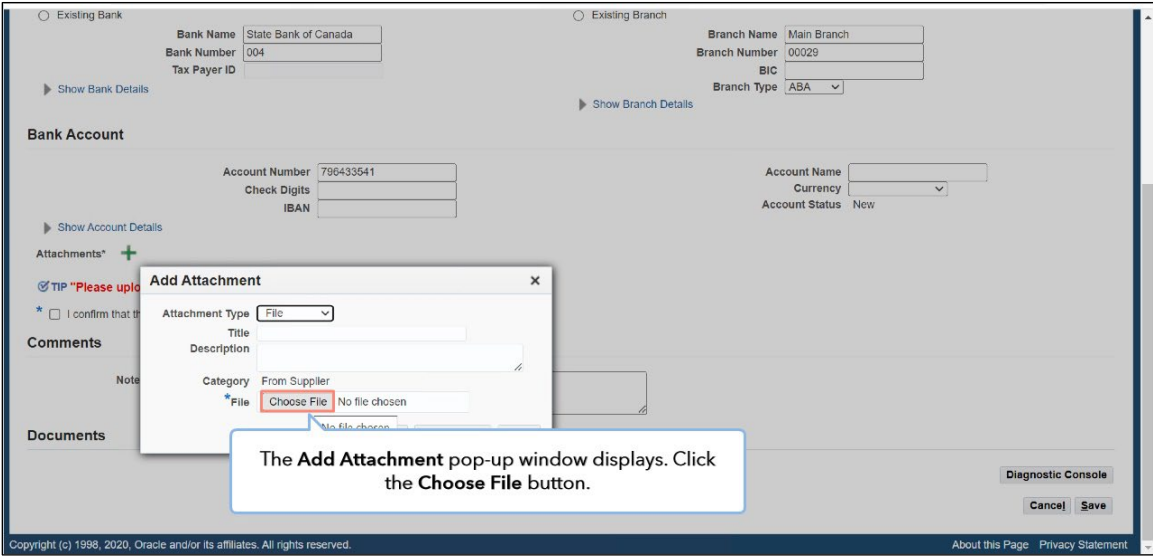
Documents

Diagnostic Console

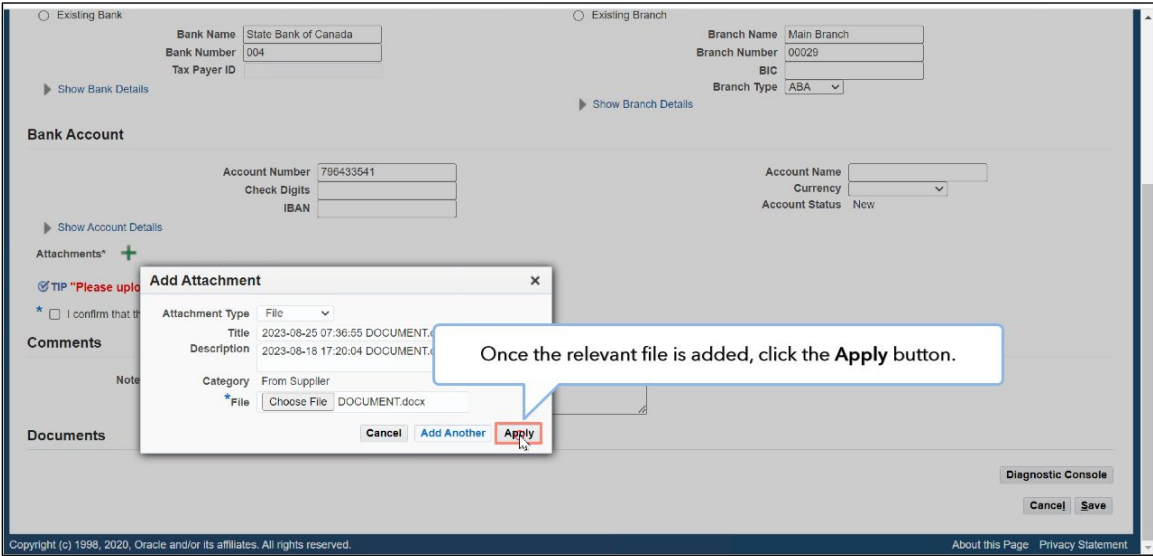
Cancel Save

supplier.metrolinx.com:8029/OA\_HTML/OA.jsp?page=/oracle/apps/pos/sbd/webui/SuppMainPG&\_ti=2011340618&retainAM=Y&addBreadcrumb=R5&oaopc=34&oaas=FFXpFALuyXeTCI2\_lvudA\_# About this Page Privacy Statement

61. The **Add Attachment** pop-up window displays. Click the **Choose File** button.



62. Once the relevant file is added, click the **Apply** button.



63. A **Confirmation** pop-up box displays confirming that the attachment has been added successfully. Click the **OK** button to continue.

The screenshot shows the 'Bank Account' form in the Metrolinx system. The form is divided into several sections: 'Existing Bank' (with fields for Bank Name, Bank Number, and Tax Payer ID), 'Existing Branch' (with fields for Branch Name, Branch Number, BIC, and Branch Type), 'Bank Account' (with fields for Account Number, Check Digits, IBAN, Account Name, Currency, and Account Status), 'Attachments' (with a 'Please upload Attachment' message and a confirmation checkbox), 'Comments' (with a 'Note to Buyer' field), and 'Documents'. A confirmation pop-up box is displayed over the 'Attachments' section, stating: 'A Confirmation pop-up box displays confirming that the attachment has been added successfully. Click the OK button to continue.' The pop-up has an 'OK' button. The form also includes a 'Diagnostic Console' button and 'Cancel' and 'Save' buttons at the bottom right.

64. Enter any notes to the buyer, if required.

The screenshot shows the 'Bank Account' form in the Metrolinx system, similar to the previous one. The 'Attachments' section now shows a 'Please upload Attachment. Attachment is mandatory' message. The 'Comments' section has a 'Note to Buyer' field, which is highlighted with a red box. A callout box points to this field with the text: 'Enter any notes to the buyer, if required.' The form also includes a 'Diagnostic Console' button and 'Cancel' and 'Save' buttons at the bottom right.

As part of the process of adding a new bank account, please ensure that you enter a note to the buyer specifying to which site you would prefer to assign the bank account.

Existing Bank

Bank NameState Bank of Canada

Bank Number004

Tax Payer ID

Show Bank Details

Existing Branch

Branch NameMain Branch

Branch Number00029

BIC

Branch TypeABA

Show Branch Details

Bank Account

Account Number796433541

Check Digits

Account Name

Currency

Account StatusNew

As part of the process of adding a new bank account, please ensure that you enter a note to the buyer specifying to which site you would prefer to assign the bank account.

Note to Buyer

The Bank account needs to be assigned to our "Home Base" site.

Documents

Diagnostic Console

CancelSave

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About this PagePrivacy Statement

65. Click the **Save** button.

Existing Bank

Bank NameState Bank of Canada

Bank Number004

Tax Payer ID

Show Bank Details

Existing Branch

Branch NameMain Branch

Branch Number00029

BIC

Branch TypeABA

Show Branch Details

Bank Account

Account Number796433541

Check Digits

IBAN

Account Name

Currency

Account StatusNew

Show Account Details

Attachments\*1+

TIP "Please upload Attachment. Attachment is mandatory"

I confirm that the attachments have been uploaded.

Comments

Note to Buyer

The Bank account needs to be assigned to our "Home Base" site.

Documents

Diagnostic Console

CancelSave

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Click the **Save** button.

A message displays, confirming that the banking details have been added to your organization's profile. You can receive payments against invoices only after Metrolinx approves your banking details. For example, the account number ending in "4901" is in the **Approved** status.

Note that every time your banking details are updated or created, it will go for Metrolinx's approval. For example, the account number ending in "7654" is in the **Change Pending** status implying that it is yet to be approved by Metrolinx.

**Confirmation**  
Bank account 796433541 has been added to your company profile. The account information will be routed to an administrator who will review the details and carry out any account verification that is required. You will be notified once the review is complete.

A message displays, confirming that the banking details have been added to your organization's profile. You can receive payments against invoices only after Metrolinx approves your banking details. For example, the account number ending in "4901" is in the **Approved** status.

Note that every time your banking details are updated or created, it will go for Metrolinx's approval. For example, the account number ending in "7654" is in the **Change Pending** status implying that it is yet to be approved by Metrolinx.

Account Number	Bank Name	Start Date	End Date	Priority	Increase	Decrease	Status	Update
XXXXXXXXXX7654	ROYAL BANK OF CANADA	16-Jun-2023		4	⬆	⬇	Change Pending	✏
XXXXXX4901	Testing	02-Jan-2023		5	⬆	⬇	Approved	✏
XXXXXX8024	Testing2	20-Jun-2023		6	⬆	⬇	Approved	✏
XXXXXX3891	Testing3	21-Jun-2023		7	⬆	⬇	Approved	✏
XXXXXX0496	Testing4	21-Jun-2023		8	⬆	⬇	Approved	✏
XXXXXX1214	Testing5	21-Jun-2023		9	⬆	⬇	Approved	✏

66. Click the **Payment & Invoicing** section.

**Banking Details**

View: General Accounts Go

TIP Date format example: 25-Aug-2023

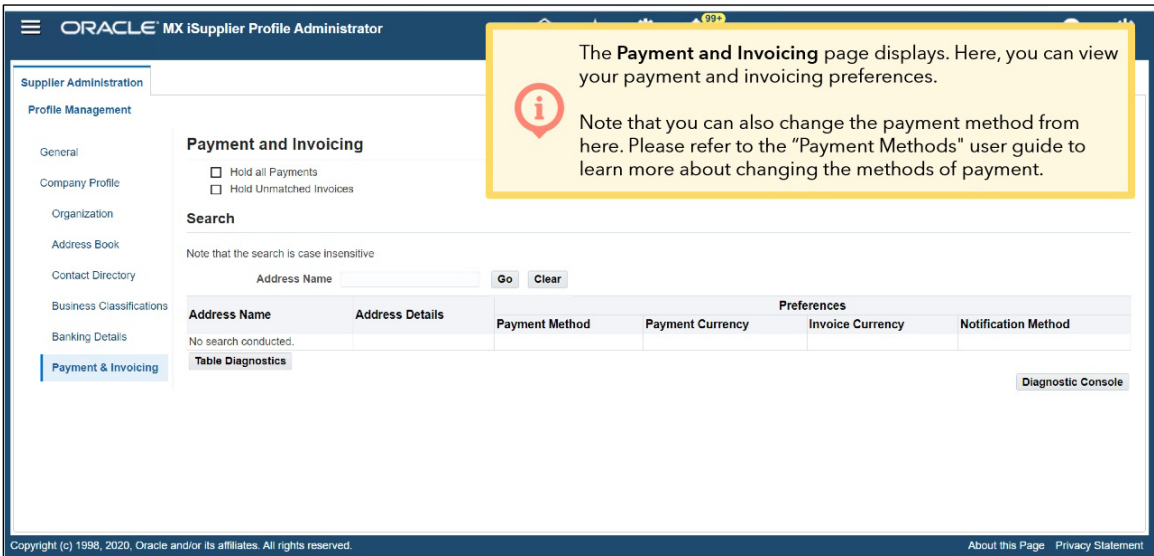
Create

Details	Account Number	IBAN	Currency	Bank Name	Start Date	End Date	Priority	Increase	Decrease	Priority	Status	Update
▶	XXXXXXXX2680		270		20-May-2022	27-Jul-2023	1	⬆	⬇		Approved	✏
▶	XXXXXXXXXX1232			TEST 16_JUN_2023_01	16-Jun-2023	27-Jul-2023	2	⬆	⬇		Approved	✏
▶	XXXXXXXXXX1546			TEST 16_JUN_2023_02	16-Jun-2023		3	⬆	⬇		Approved	✏
▶	XXXXXXXXXX7654			ROYAL BANK OF CANADA	16-Jun-2023		4	⬆	⬇		Change Pending	✏
▶					02-Jan-2023		5	⬆	⬇		Approved	✏
▶					20-Jun-2023		6	⬆	⬇		Approved	✏
▶	XXXXXX3891			Testing3	21-Jun-2023		7	⬆	⬇		Approved	✏
▶	XXXXXX0496			Testing4	21-Jun-2023		8	⬆	⬇		Approved	✏
▶	XXXXXX1214			Testing5	21-Jun-2023		9	⬆	⬇		Approved	✏

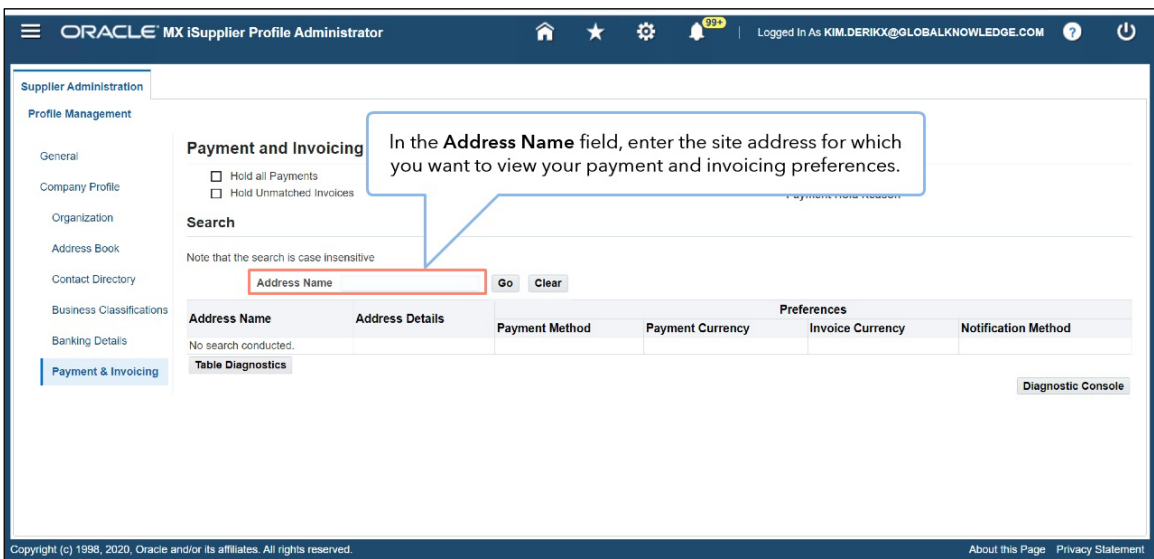
Click the **Payment & Invoicing** section.

The **Payment and Invoicing** page displays. Here, you can view your payment and invoicing preferences.

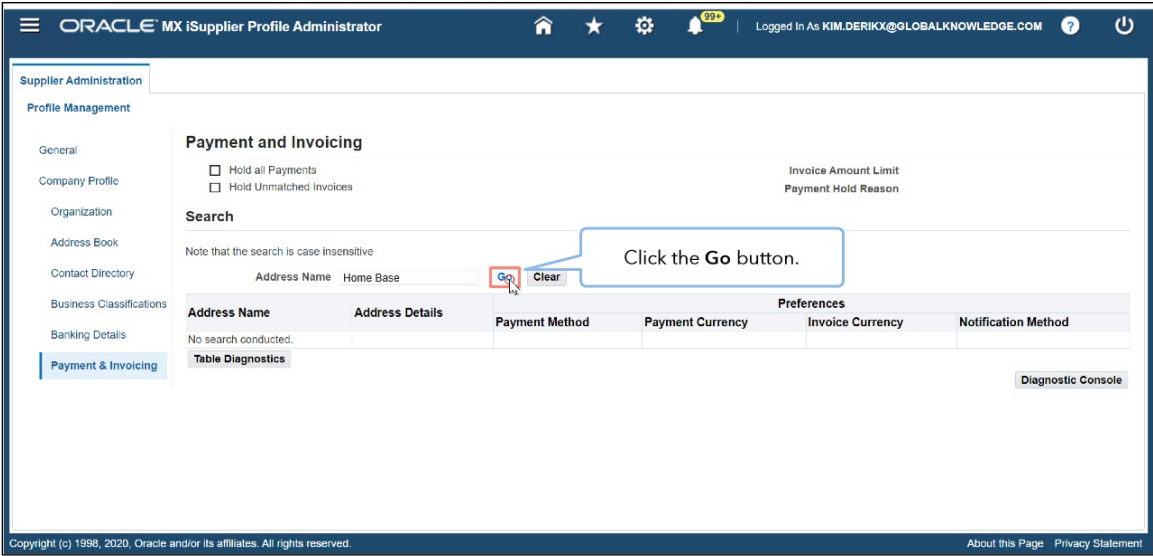
**Note:** You can also change the mode of payment from here. Please refer to the "Payment Methods" user guide to learn more about changing the mode of payment.



67. In the **Address Name** field, enter the site address for which you want to view your payment and invoicing preferences.



68. Click the **Go** button.



69. The search results are displayed. View the payment and invoicing details for the address in the following fields, such as **Payment Method**, **Payment Currency**, **Invoice Currency**, and **Notification Method**.

