

Metrolinx iSupplier Support

Updating Attachments for Invoices Submitted in iSupplier

When a supporting document / attachment needs to be updated for an invoice, any old/incorrect attachments should be deleted before uploading new attachments for accurate record-keeping.

This guide will cover how to view, delete and add attachments for an invoice in the Metrolinx iSupplier portal.



Learn how you can [edit or cancel invoices](#) submitted through the Metrolinx iSupplier portal in the linked guide!

Table of Contents

A. View Existing Attachments.....	2
1. Login to iSupplier.....	2
2. Navigate to 'Supplier Home'	2
3. Navigate to the Finance Tab.....	3
4. Search for the Invoice	3
5. View Attachments	4
B. Delete Existing Attachments	4
6. Delete Attachments	4
C. Add New Attachments	5
7. Navigate to 'Add Attachment' Window	5
8. Browse Desktop Files	5
9. Select File.....	6
10. Upload Attachment.....	6
11. Review Attachments.....	7

Metrolinx iSupplier Support

Updating Attachments for Invoices Submitted in iSupplier

A. View Existing Attachments

1. Login to iSupplier

Enter your User Name and Password to login to the [Metrolinx iSupplier Portal](#).

ORACLE

User Name

Password

Log In Cancel

Login Assistance
Register Here

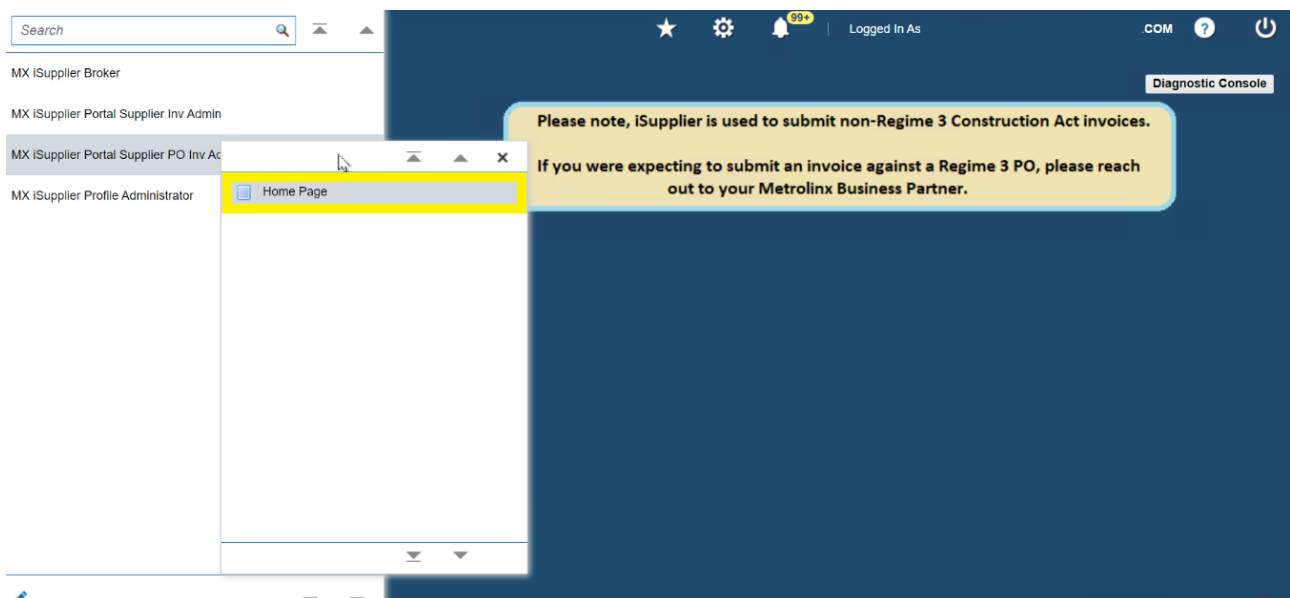
Accessibility
None

Language
English

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2. Navigate to 'Supplier Home'

On the top-left corner of the screen, click the 3 lines to open the side-menu and navigate to the "Home Page" under 'MX iSupplier Portal Supplier PO Inv Admin'.



Metrolinx iSupplier Support

Updating Attachments for Invoices Submitted in iSupplier

3. Navigate to the 'Finance' Tab

Click the 'Finance' tab at the top-left of the homepage.

The screenshot shows the Oracle iSupplier Portal homepage. The 'Finance' tab is highlighted in the top navigation bar. Below the navigation bar, there is a search bar with a dropdown menu set to 'PO Number' and a 'Go' button. A disclaimer message is visible below the search bar. The main content area is divided into several sections: 'Notifications', 'Orders At A Glance', and 'Shipments At A Glance'. On the right side, there is a 'Planning' sidebar with a list of navigation options: Orders, Agreements, Purchase Orders, Purchase History, Shipments, Delivery Schedules, Overdue Receipts, Advance Shipment Notices, Receipts, Receipts, Returns, On-Time Performance, Invoices, and Payments.

Subject	Date
Supplier Profile Management: Change in Bank Account Details for ACME Learning Ltd	07-Feb-2022 09:39:42
Bank Account Creation/Update message	03-Feb-2022 07:16:06
Bank Account Creation/Update message	03-Feb-2022 07:09:20
Invoice: 12822_CMD1 is Cancelled	28-Jan-2022 10:52:26
Supplier Profile Management: Approval of Bank Account	25-Jan-2022 03:29:51

PO Number	Description	Order Date
233228	IT Equipment (Monitor/Printer) - Delivery needed by 20 Feb	11-Feb-2022 02:15:24
233229	Technician visit charges	09-Feb-2022 03:30:47
233221	Technician visit to install equipment	28-Jan-2022 10:55:06
233220	Equipment and additional supplies	28-Jan-2022 10:19:45
233219	Consultation for design and delivery	28-Jan-2022 10:14:56

4. Search for the Invoice

In the 'Search' section, input the 'Invoice Number' and click 'Go'. The invoice should populate in the table beneath.

The screenshot shows the Oracle iSupplier Portal search interface for invoices. The 'Finance' tab is selected in the top navigation bar. Below the navigation bar, there are links for 'Create Invoices', 'View Invoices', and 'View Payments'. The 'Invoice Actions' section includes a 'Create Invoice' button and a 'With a PO' button. The 'Search' section contains a note that the search is case insensitive. There are input fields for 'Supplier', 'Invoice Number', 'Invoice Date From', 'Invoice Status', 'Purchase Order Number', 'Invoice Amount', 'Invoice Date To', and 'Currency'. A 'Go' button is highlighted in yellow. Below the search fields is a table with columns: Invoice Number, Invoice Date, Invoice Currency Code, Invoice Amount, Purchase Order, Status, Withdraw, Cancel, Update, and View Attachments. The table currently shows 'No search conducted'.

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

Metrolinx iSupplier Support

Updating Attachments for Invoices Submitted in iSupplier

5. View Attachments

You may view all existing attachments by clicking the paperclip icon under the 'View Attachments' column.

The screenshot shows the Oracle iSupplier Portal interface. At the top, there is a navigation bar with 'ORACLE iSupplier Portal' and a 'Logged In As' indicator. Below this, there are tabs for 'Supplier Home', 'Orders', 'Shipments', and 'Finance'. Under the 'Finance' tab, there are sub-tabs for 'Create Invoices', 'View Invoices', and 'View Payments'. The main area is titled 'Invoice Actions' and includes a search section with fields for Supplier, Invoice Number, Invoice Date From, Invoice Date To, Purchase Order Number, Invoice Amount, Invoice Date To, and Currency. Below the search section is a table with columns: Supplier, Invoice Number, Invoice Date, Invoice Currency Code, Invoice Amount, Purchase Order, Status, Withdraw, Cancel, Update, View Attachments, and Rejection Comments. The 'View Attachments' column contains a paperclip icon with a blue '1' notification bubble and a green plus sign.

Supplier	Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Purchase Order	Status	Withdraw	Cancel	Update	View Attachments	Rejection Comments
XYZ COMPANY	INV000667	14-Feb-2024	CAD	304.61		In Process					

B. Delete Existing Attachments

6. Delete Attachments

If there are any outdated/incorrect attachments categorized as "From Supplier", you may delete them by clicking the arrow button in the 'Action' column for each attachment record and selecting "Delete" in the drop-down menu. Click "Yes" in the 'Confirmation' window to delete.

The screenshot shows a close-up of the 'Attachments' dialog box and the 'Confirmation' dialog box. The 'Attachments' dialog box has a table with columns: Seq, Title, Type, Description, Category, and Action. The first row has Seq: 10, Title: 202, Type: File, Description: (empty), Category: From Supplier, and Action: . A dropdown menu is open over the 'Action' column, showing options: Update, Publish, Delete (highlighted with a yellow box), and Record History. To the right, the 'Confirmation' dialog box is shown with the text: 'Are you sure you want to delete the attachment'. At the bottom right of the 'Confirmation' dialog box, there are two buttons: 'No' and 'Yes' (highlighted with a yellow box).

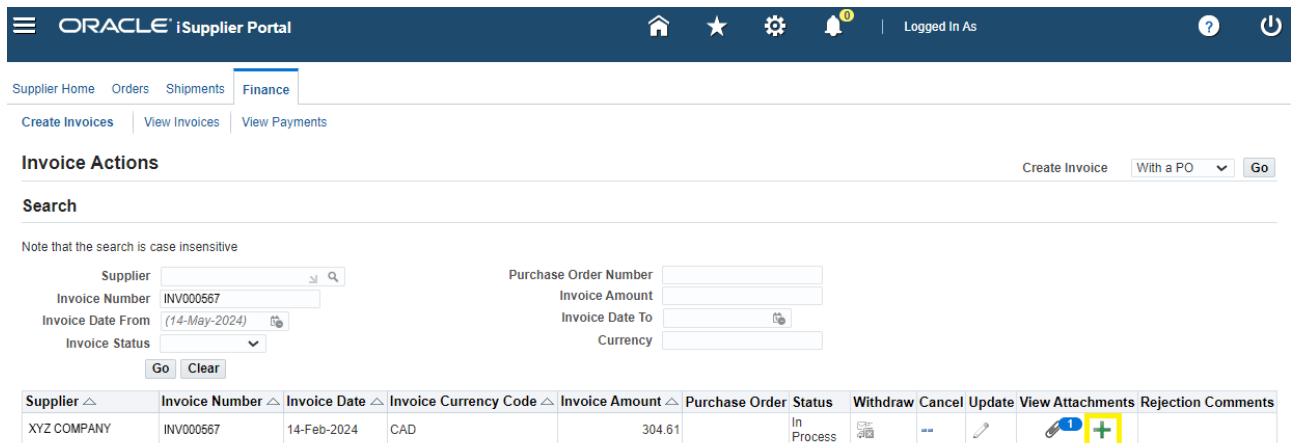
Metrolinx iSupplier Support

Updating Attachments for Invoices Submitted in iSupplier

C. Add New Attachments

7. Navigate to 'Add Attachment' Window

Click the green '+' icon in the 'View Attachments' column.

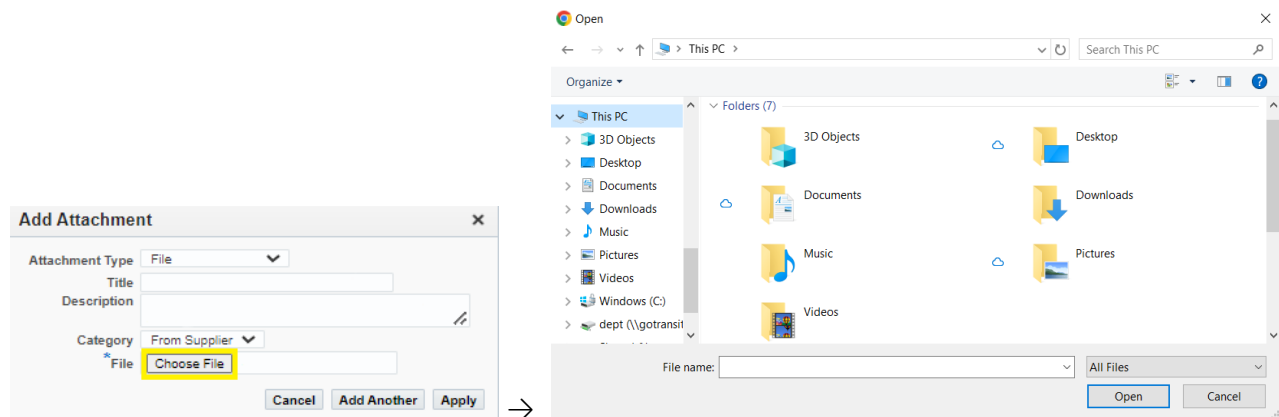


The screenshot shows the Oracle iSupplier Portal interface. The top navigation bar includes 'Supplier Home', 'Orders', 'Shipments', and 'Finance'. Below this, there are tabs for 'Create Invoices', 'View Invoices', and 'View Payments'. The 'Invoice Actions' section contains a 'Create Invoice' button and a 'With a PO' dropdown menu. A search section is present with fields for Supplier, Invoice Number, Invoice Date From, Invoice Status, Purchase Order Number, Invoice Amount, Invoice Date To, and Currency. Below the search section is a table of invoices. The first row is for 'XYZ COMPANY' with Invoice Number 'INV000567' and Invoice Date '14-Feb-2024'. The 'View Attachments' column for this row has a green '+' icon highlighted.

Supplier	Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Purchase Order	Status	Withdraw	Cancel	Update	View Attachments	Rejection	Comments
XYZ COMPANY	INV000567	14-Feb-2024	CAD	304.61		In Process						

8. Browse Desktop Files

The 'Add Attachment' pop-up window will appear. Click "Choose File" which will bring up the 'Open' window allowing you to browse your desktop files.



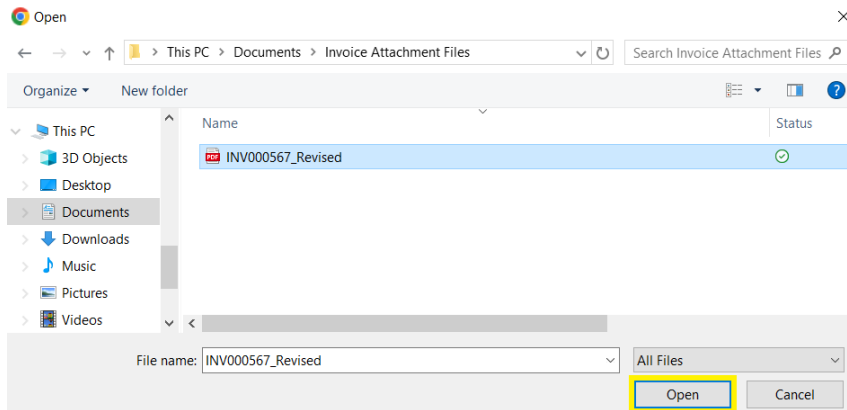
The screenshot shows two windows. On the left is the 'Add Attachment' pop-up window. It has fields for 'Attachment Type' (set to 'File'), 'Title', 'Description', 'Category' (set to 'From Supplier'), and 'File'. The 'File' field has a 'Choose File' button highlighted in yellow. On the right is the 'Open' file browser window. It shows the 'This PC' view with a list of folders on the left and a grid of folder icons on the right. The 'File name' field is empty, and the 'All Files' filter is selected. An arrow points from the 'Choose File' button in the 'Add Attachment' window to the 'Open' window.

Metrolinx iSupplier Support

Updating Attachments for Invoices Submitted in iSupplier

9. Select File

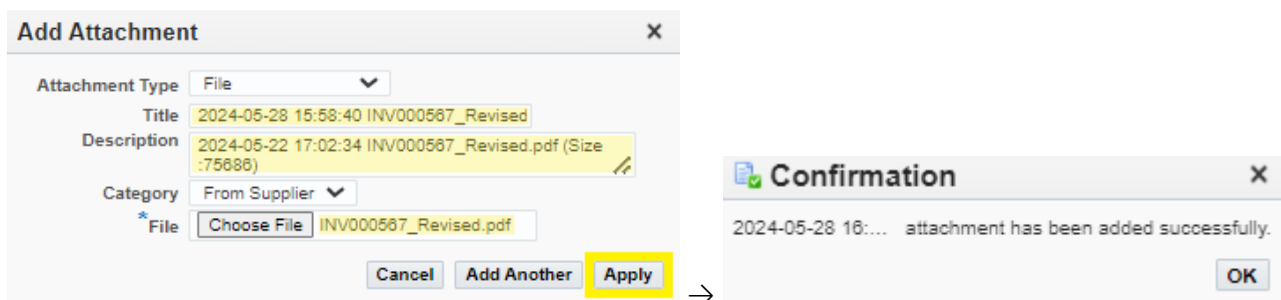
Select the relevant file and click "Open".



10. Upload Attachment

The file should populate in the 'File' field of the 'Add Attachment' pop-up window. You may edit the attachment 'Title' and 'Description' fields at this stage. Click "Apply" to upload the document.

The 'Confirmation' pop-up window displaying the "... attachment has been added successfully" message should appear.



NOTE:

- The 'Confirmation' pop-up window may take a moment depending on the file size and internet upload speed

Metrolinx iSupplier Support

Updating Attachments for Invoices Submitted in iSupplier

11. Review Attachments

You may verify the attachment upload by clicking the paperclip icon under the 'View Attachments' column to view all existing attachments linked to the invoice record.

The 'Title' and 'Description' of an attachment can be edited by clicking the arrow button in the 'Action' column for the attachment record and selecting "Update" in the drop-down menu.

