

ASSETpoint



TABSOURCE GETTING STARTED GUIDE

VERSION 71.002

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ASSETpoint

TabSource Getting Started Guide

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1. Overview

TabSource is a web-based bid management tool from AssetPoint, makers of TabWare. TabSource will streamline bid package creation, supplier notifications, supplier bid submittals, bid evaluations and awards.

This guide will walk you thru the registration and bid submittal process. It will also highlight the user administration section.

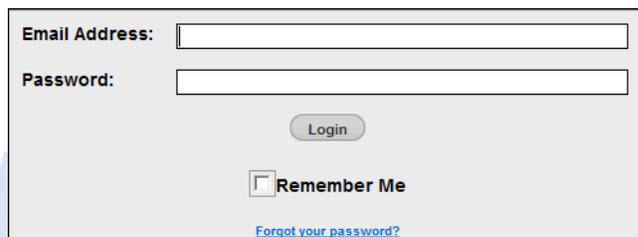
2. Registration Process

To complete the registration process, you will need the email address and password provided to you via fax. If you did not receive the fax with this information, please contact TabSource Support at tabsource@assetpoint.com.

Complete the following steps to finalize your TabSource registration.

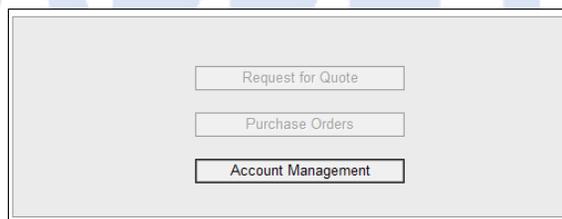
1. Login to the TabSource portal using the temporary email address and temporary password provided.

TabSource URL: <https://tabsource.tabwareonline.com/amusa/>



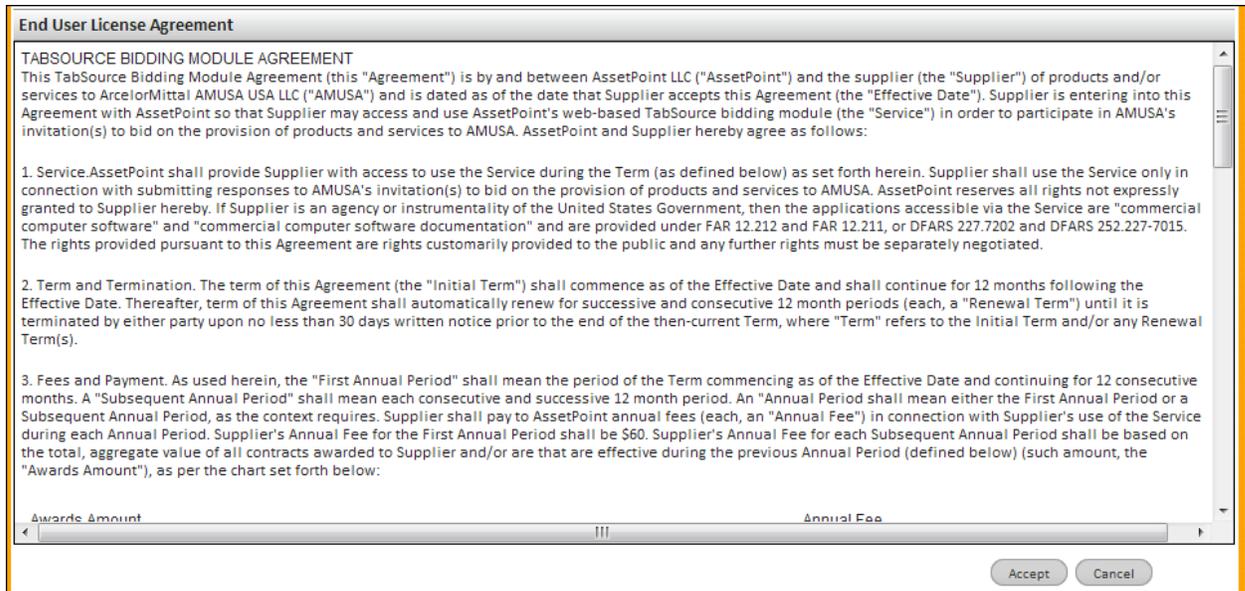
The screenshot shows a login form with two input fields: "Email Address:" and "Password:". Below the "Password:" field is a "Login" button. Underneath the button is a checkbox labeled "Remember Me" and a blue link that says "Forgot your password?".

2. Click Account Management

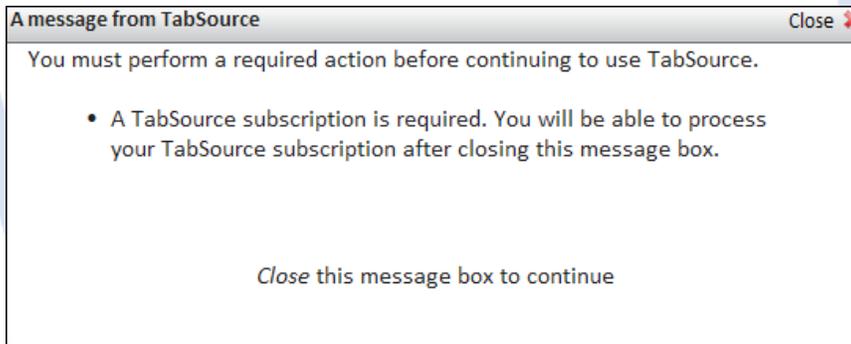


The screenshot shows a menu with three buttons: "Request for Quote", "Purchase Orders", and "Account Management". The "Account Management" button is highlighted with a darker background.

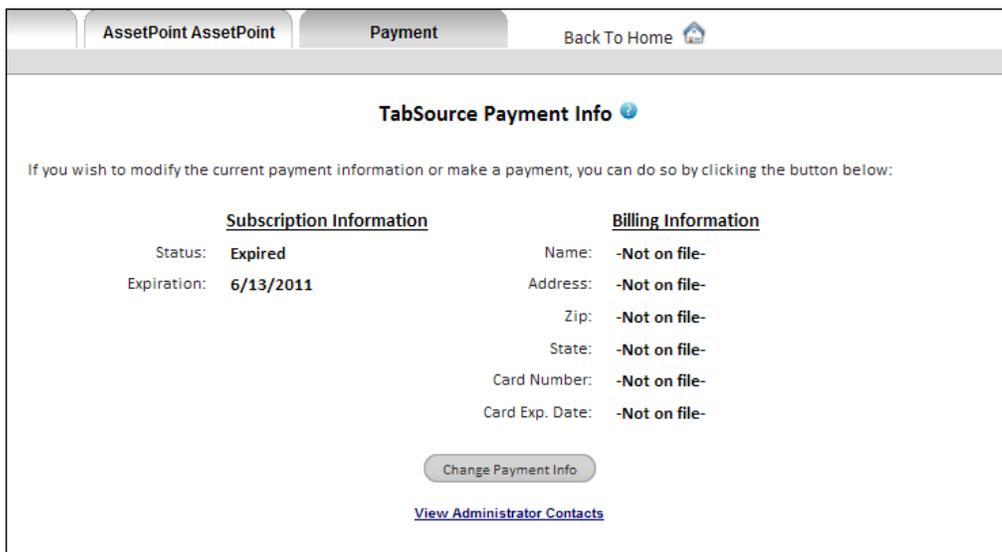
3. Review and Accept the End User License Agreement



4. After accepting the EULA you will be prompted to complete your TabSource subscription. A payment of \$60 must be submitted to complete your TabSource registration.



- a. Click close on the TabSource message box. This will take you to the payment tab



b. Click **Change Payment Info** to enter your billing address.

Note: Your billing address must match the billing address for your credit card.

Payment Billing Information ⓘ

First Name:

Last Name:

Billing Street Address:

Billing Zip Code:

Billing State:

c. Click **Save and Continue**

d. Payment information will be displayed on the screen. Click **Make Payment**.

PAYMENT

Your credit card information is not on file.

Your current subscription expired Monday, June 13, 2011.
A payment is required to continue using TabSource.

A charge of \$60.00 will be made to your credit card.

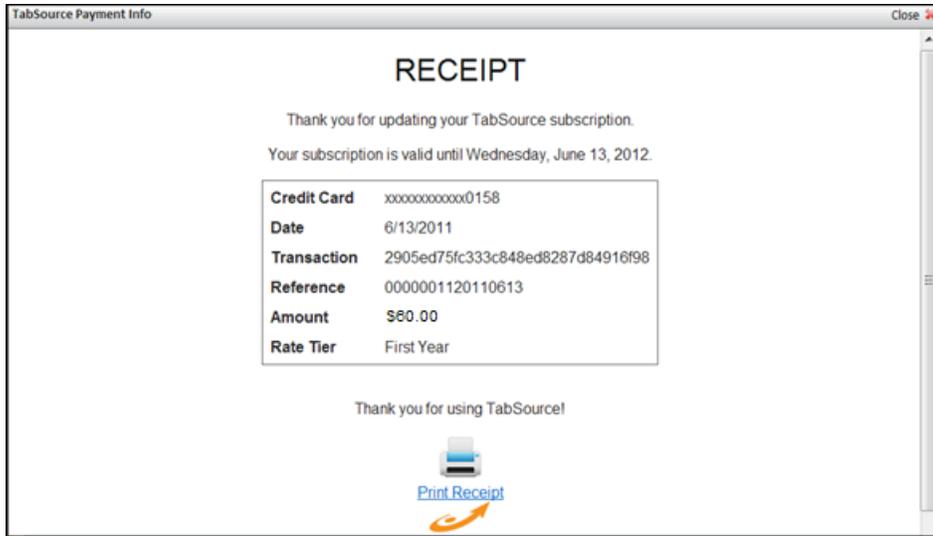
e. Enter your Visa, MasterCard or American Express information.


Assetpoint PayHere - Secure Checkout Page

Transaction Information

Tran Type	Card Store
Account Number	<input type="text"/>
Expiration Date	01 - January 2011

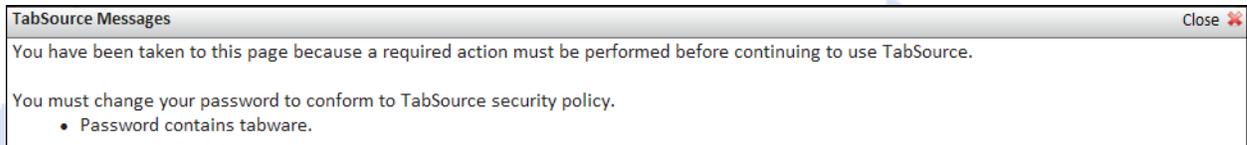
f. Click **Submit Order** to process your payment and update your TabSource subscription.



g. Click **Print Receipt** to print a copy of the receipt for your records.

h. Click Close to exit out of the payment screen.

5. The next step will be to update your password. Click Close on the TabSource message box.

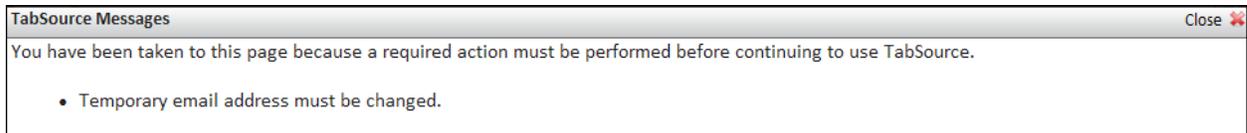


a. The change password page will appear.

b. Enter your temporary password and a new password. Save your changes.

Note: Passwords must be between 8 and 15 characters and cannot contain the word "tabware".

6. In addition to changing your temporary password, you must also enter a permanent email address that will be used for receiving RFQ bid notifications.



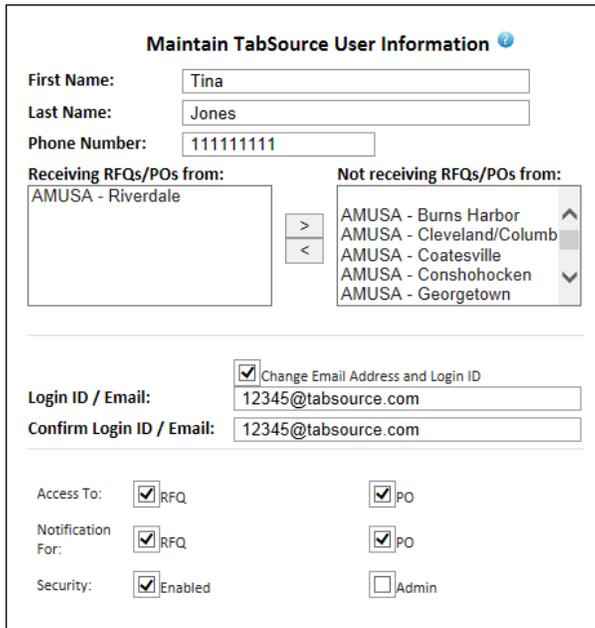
a. Click close on the TabSource message box.

b. The User Maintenance screen will appear. Update the following User information:

- First Name
- Last Name

- o Phone Number

c. Select the **Change Email Address and Login ID** check box.



Maintain TabSource User Information

First Name: Tina
Last Name: Jones
Phone Number: 11111111

Receiving RFQs/POs from:
AMUSA - Riverdale

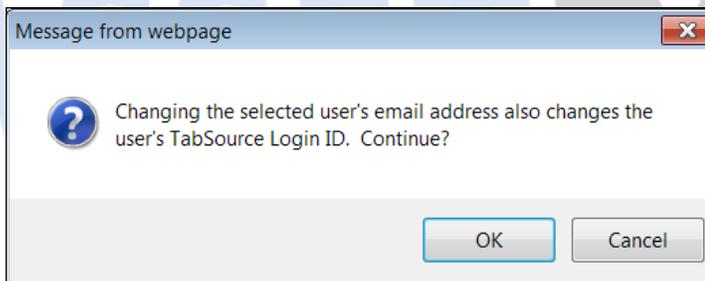
Not receiving RFQs/POs from:
AMUSA - Burns Harbor
AMUSA - Cleveland/Columb
AMUSA - Coatesville
AMUSA - Conshohocken
AMUSA - Georgetown

Change Email Address and Login ID

Login ID / Email: 12345@tabsource.com
Confirm Login ID / Email: 12345@tabsource.com

Access To: RFQ PO
Notification For: RFQ PO
Security: Enabled Admin

d. Click **OK** on the following message:



e. Enter an email address that will receive RFQ bid email notifications. *The entered email address will now become your **TabSource Login ID**.* Save your changes.

Note: It is recommended that at least 2 accounts be created. This will ensure that someone at your company receives an email for bids in the event another person is out of the office.

f. Update the following checkboxes appropriately:

a. **Access To:**

- i. RFQ – Selected, the user will have access to issued RFQs.
- ii. PO – Selected, the user will have access to newly issued POs.

b. **Notification For:**

- i. RFQ – Selected, the user will receive RFQ bid notifications via email.
- ii. PO – Selected, the user will receive PO notifications via email.

c. **Security:**

- i. Enabled – Selected, the user will be enabled and allowed to login to the system.
 - ii. Admin – Selected, the user will have Admin rights. This allows the user to create new users and update the profiles of existing users. Users that do not have Admin access will only be allowed to update their notification access.
- g. Click Save Changes.

Now that you have registered with your new email address, you should have received an email confirming your new email address. The email will look similar to this:

Subject: TabSource changed login/email verification

Your TabSource Login Id and Email Address has changed.

Tammy Johnson made this change to your account using the TabSource Account maintenance section on 7/6/2011 at 6:46 PM.
The new email address: tina.jones@assetpoint.com
The old email address: mcv000146@tabsource.com

This new email address, tina.jones@assetpoint.com, is now your TabSource Login Id.
Please use the below link to verify this new email address and to access TabSource.

<https://tabsource.tabwareonline.com/AMUSA/verify.aspx?token=1wF7gSWyi157HLwNCG9UyKc-NcEDwWlvt4i5tXdA481>

It is very important to click on the verify link at the bottom of the email. Clicking on the link will ensure that you will receive RFQ bid and PO notifications at the correct email address. It will also ensure that you receive important TabSource information pertaining to TabSource updates and outages.

You are now ready to begin processing RFQ bids and POs thru TabSource.

3. Minimum System Requirements

Minimum browser versions supported by TabSource:

- Chrome version 7
- FireFox version 3.5
- Internet Explorer version 8
- Safari version 5

Minimum screen resolution is 1024 x 768.

Using a browser version or screen resolution that is less than the minimum requirements could produce unexpected results.

4. Bid Submittal Process

A Request for Bid will be sent to a supplier via email, when a Request for Quote is submitted for bidding.

1. Click on the [TabSource](#) link shown in the email below to access the RFQ.

Subject: A new opportunity to bid

You have an opportunity to bid on a new RFQ:

- Supplier: Gexpro-IH,Henn, RD, I/N*
- Buyer: Dodd, Dianne
- Plant: ArcelorMittal Riverdale Inc.
- RFQ: RFQR002568
- Date Due: 12/10/2011
- Comments: Please respond by 12/10/2011

You can access this RFQ via the supplier portal at [TabSource](#)

2. Login with your email address and password.

Email Address:

Password:

Remember Me

[Forgot your password?](#)

The screenshot shows the TABSource ArcelorMittal RFQ portal. At the top, it displays the RFQ number (RFQR002568), creation date (08/09/2011), response date (12/10/2011), and current status (Ready for Bid). The buyer information is listed as Dodd, Dianne (708-392-1198) with an email link. Navigation buttons include Attached Docs (Yes), Calculate Total, Decline Bid, Print Bid, and Validate Bid. The main form area contains fields for Quote Number, Assigned To, Freight (Prepaid), FOB (Destination), Estimated Weight, Good Through, and Currency (US Dollar). A comments section is also present. Payment terms are set to NET 45 DAYS, and ancillary charges are 0.00 US Dollar. A shipping address for ArcelorMittal Riverdale Inc. is provided. A table at the bottom lists one item: Line 1, Item # 100072686, Description RNG:G,GASKET, Quantity 12, Unit Measure EACH, Attached Docs 1/1, and Line Cost N/A.

RFQ # RFQR002568 / Date Created: 08/09/2011 / Response Date: 12/10/2011 / Current Status: Ready for Bid

Buyer: Dodd, Dianne / 708-392-1198 / [Email](#)

Attached Docs (Yes) Calculate Total Decline Bid Print Bid Validate Bid

Ship To:
ArcelorMittal Riverdale Inc.
Bldg. 33 (ph 708) 392-1098)
13500 SOUTH PERRY AVE.
RIVERDALE, IL 60827

This is a Request for Quote (RFQ); promptly quote your PRICE AND AVAILABILITY on the following item(s). No products or services may be rendered against this RFQ.

Submit quote via fax or email to the Attn. of [View All Text](#)
[View Terms and Conditions](#)

Quote Number:
Assigned To:
Freight: Prepaid
FOB: Destination
Estimated Weight:
Good Through:
Currency: US Dollar

Comments:
[View All Text](#)

Payment Terms: NET 45 DAYS
Ancillary Charges: 0.00 US Dollar

1 of 1
Show All

== Click on a line item below to enter bid information ==

Line	Item #	Description	Quantity	Unit Measure	Attached Docs	Line Cost
1	100072686	RNG:G,GASKET	12	EACH	1/1	N/A

3. Enter your bid information:

The screenshot shows the TABSource interface for a bid entry. At the top, it displays the TABSource and ArcelorMittal logos. The header information includes: RFQ # RFQR002568, Date Created: 08/09/2011, Response Date: 12/10/2011, and Current Status: Ready for Bid. The Buyer is identified as Dodd, Dianne. A navigation bar contains buttons for Attached Docs (Yes), Calculate Total, Decline Bid, Print Bid, and Validate Bid. The main form area is divided into several sections: Ship To (ArcelorMittal Riverdale Inc.), Quote Number (APQT0510), Assigned To (Tammy), Freight (Prepaid), FOB (Destination), Estimated Weight, Good Through (12/30/2011), and Currency (US Dollar). A comments box contains the text "I can ship the item ASAP". Payment Terms are set to NET 45 DAYS, and Ancillary Charges are 0.00 US Dollar. Below the form, a table lists the bid lines:

Line	Item #	Description	Quantity	Unit Measure	Attached Docs	Line Cost
1	100072686	RNG:G,GASKET	12	EACH	1/1	N/A

Note: header information is saved as you navigate from field to field.

4. Select a line to view the line details:

The screenshot shows the detailed view of a bid line. The header information is identical to the previous screenshot. The main form area is divided into several sections: Ship To, Quote Number (APQT0510), Assigned To (Tammy), Freight (Prepaid), FOB (Destination), Estimated Weight, Good Through (12/30/2011), and Currency (US Dollar). A comments box contains the text "I can ship the item ASAP". Payment Terms are set to NET 45 DAYS, and Ancillary Charges are 0.00 US Dollar. Below the form, a table lists the bid lines:

Line	Item #	Description	Quantity	Unit Measure	Attached Docs	Line Cost
1	100072686	RNG:G,GASKET	12	EACH	1/1	N/A

Line 1: RNG:G,GASKET Technical Contact: Aneston, Mike / (708) 392-1086 / Email

The detailed view for Line 1 includes the following information:

- Item Number: 100072686
- Requested Qty: 12
- Unit Measure: EACH
- Manufacturer: MARLEY COOLING...
- Part Number: 021162
- Subs. Allowed: No
- Purchasing Desc.: RING, GASKET; ITEM 1.5; PART # 021162 - END USE: MEDIUM PRESSURE COOLING TOWER
- Unit Price: 0.00
- Package Qty: 0
- Lead Days: 0
- Quantity: 12
- Unit Of Measure: EACH
- Manufacturer: MARLEY COOLING TOW
- Part Number: 021162
- Comments: Decline To Bid
- Line Item Subtotal: 0.00 US Dollar
- Ancillary Charges: 0.00 US Dollar
- Line Item Total: 0.00 US Dollar

5. Enter your line level bid information:

Line 1: RNG:G,GASKET Technical Contact: Aneston, Mike / (708) 392-1086 / [Email](#)

Item Number: 100072686	Unit Price: 5.25	Comments: We also sell this item in bulk <input type="checkbox"/> Decline To Bid View All Text
Requested Qty: 12	Package Qty: 1	
Unit Measure: EACH	Lead Days: 2	
Manufacturer: MARLEY COOLING...	Quantity: 12	
Part Number: 021162	Unit Of Measure: EACH	
Subs. Allowed: No	Manufacturer: MARLEY COOLING TOW	
Purchasing Desc.: RING, GASKET; ITEM 1.5; PART # 021162 - END USE: MEDIUM PRESSURE COOLING TOWER	Part Number: 021162	
View All Text		
Line Item Subtotal: 63.00 US Dollar Ancillary Charges: 0.00 US Dollar Line Item Total: 63.00 US Dollar		<input type="button" value="Save"/> <input type="button" value="Save"/>

Note: Line level information must be saved by clicking one of the save icons:



Any information relating to substitutions or manufacturer changes please note in the comments field.

A confirmation message will appear at the top of the screen confirming the line was saved:



RFQ lines may also contain documents that are important to your bid.

6. Click on the documents icon to view documents linked by the Buyer.

TABSource ArcelorMittal

RFQ # RFQR002568 / Date Created: 08/09/2011 / Response Date: 12/10/2011 / Current Status: **In Process** [Back To Home](#)

Buyer: Dodd, Dianne / 708-392-1198 / [Email](#) [Attached Docs \(Yes\)](#) [Calculate Total](#) [Decline Bid](#) [Print Bid](#) [Validate Bid](#)

Ship To: ArcelorMittal Riverdale Inc. Bldg. 33 (ph 708) 392-1098) 13500 SOUTH PERRY AVE. RIVERDALE, IL 60827 <small>This is a Request for Quote (RFQ); promptly quote your PRICE AND AVAILABILITY on the following item(s). No products or services may be rendered against this RFQ.</small> Submit quote via fax or email to the Attn. of View All Text View Terms and Conditions	Quote Number: APQT0510 Assigned To: Tammy Freight: Prepaid FOB: Destination Estimated Weight: Good Through: 12/30/2011 Currency: US Dollar	Comments: I can ship the item ASAP View All Text Payment Terms: NET 45 DAYS Ancillary Charges: 0.00 US Dollar
--	---	--

1 of 1 Show All

== Click on a line item below to enter bid information ==

Line	Item #	Description	Quantity	Unit Measure	Attached Docs	Line Cost
1	100072686	RNG:G,GASKET	12	EACH	1/1	63.00

Document Center for RFQ# RFQR002568 close ✖

Download Buyer Docs Upload Supplier Docs

Name	Line ^	Type	Size
SUMMARY.PDF	1	Adobe Acrobat	54 KB

◀ 1 of 1 ▶

[↓ All](#)

The **Download Buyer Docs** tab shows documents that the Buyers have linked that you can download to your system and view or print. The **Upload Supplier Docs** tab is to allow, you the supplier, to upload documents to be transferred to the Buyer.

Note: An uploaded file cannot be deleted or overwritten once it's been transferred from TabSource to the Buyer's network. If a newer copy of the file needs to be uploaded, the file must be renamed and sent again.

Once your line information is saved and you've viewed your documents, you are ready to submit your Bid.

7. Click the Validate Bid icon

[Validate Bid](#)

TABSource **ArcelorMittal**

RFQ # RFQR002568 / Date Created: 08/09/2011 / Response Date: 12/10/2011 / Current Status: **In Process** Back To Home

Buyer: Dodd, Dianne / 708-392-1198 / [Email](#) Attached Docs (Yes) Calculate Total Decline Bid Print Bid **Validate Bid**

Ship To:
ArcelorMittal Riverdale Inc.
Bldg. 33 (ph 708) 392-1098)
13500 SOUTH PERRY AVE.
RIVERDALE, IL 60827

This is a Request for Quote (RFQ); promptly quote your PRICE AND AVAILABILITY on the following item(s). No products or services may be rendered against this RFQ.

Submit quote via fax or email to the Attn. of [View All Text](#)
[View Terms and Conditions](#)

Quote Number:

Assigned To:

Freight:

FOB:

Estimated Weight:

Good Through:

Currency:

Comments:

Payment Terms:

Ancillary Charges: [0.00 US Dollar](#)

◀ 1 of 1 ▶
[Show All](#)

== Click on a line item below to enter bid information ==

Line ^	Item #	Description	Quantity	Unit Measure	Attached Docs	Line Cost
1	100072686	RNG:G,GASKET	12	EACH	1/1	63.00

There are 3 types of messages that may appear at the top of the screen. Each message will point out which field or line is causing the message to appear. The number beside each message type indicates the number of messages that you have for that message type.

1. Error messages Errors (0) indicate an error condition that will prevent your bid from being submitted. You must correct an error before you will be allowed to submit your bid.
2. Warning messages Warnings (1) indicate that there is a condition that you may wish to correct, but you will not be required to do so to submit the bid.
3. Info (informational) messages Info (0) simply provide more information about a certain condition that you may find helpful to know.

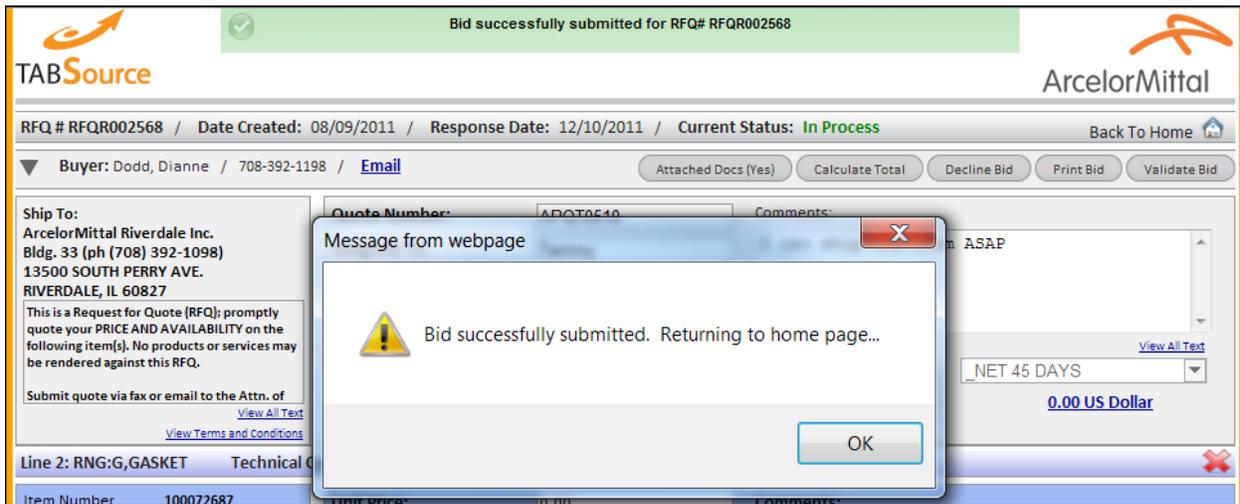
Bids can be submitted if there are warnings or info messages, but all errors must be cleared before submitting a bid.

The screenshot shows the TABSource bid submission interface. At the top, there is a yellow banner that says "Line not bid." Below this, there are three checkboxes: "Info (0)", "Warnings (2)", and "Errors (0)". The "Errors (0)" checkbox is checked. The interface includes a header with the TABSource logo and the ArcelorMittal logo. Below the header, there is a navigation bar with buttons for "Re-Validate", "Submit Bid", "Attached Docs (Yes)", "Calculate Total", "Decline Bid", "Print Bid", and "Validate Bid". The main content area is divided into several sections: "Ship To" (ArcelorMittal Riverdale Inc.), "Quote Number" (APQT0510), "Assigned To" (Tammy), "Freight" (Prepaid), "FOB" (Destination), "Estimated Weight", "Good Through" (12/30/2011), "Currency" (US Dollar), "Comments" (I can ship the item ASAP), "Payment Terms" (NET 45 DAYS), and "Ancillary Charges" (0.00 US Dollar). Below this, there is a section for "Line 2: RNG:G,GASKET" with technical contact information. The bottom section contains item details for "RING, GASKET; ITEM 1.5 - PART # 478982 - END USE: LOW PRESSURE COOLING TOWER", including fields for "Unit Price", "Package Qty", "Lead Days", "Quantity", "Unit Of Measure", "Manufacturer", and "Part Number".

4. Once all errors are cleared, click Submit Bid:

This screenshot is identical to the one above, but the "Submit Bid" button in the navigation bar is highlighted with a red box, indicating the next step in the process.

You will receive a confirmation that your bid was successfully entered:



5.RFQ Late Notifications

A supplier will receive an email notice when a RFQ bid is about to expire and a bid has not been submitted by the supplier. Only users with the **Notifications For: RFQ** option selected will receive emails.

Subject: A bid opportunity is expiring.

This notification is to alert you to an opportunity to bid that will soon expire.

- Plant: 095
- RFQ: RQR0044868
- Date Due: 04/08/2011

You can access this RFQ via the supplier portal at [TabSource](#)

Please do not reply to this email. Mail sent to this address will not be seen or answered.

If you have any business questions related to this RFQ, please contact the Buyer at ArcelorMittal. The Buyer's name, phone number and email information is located in the header section of the RFQ details.

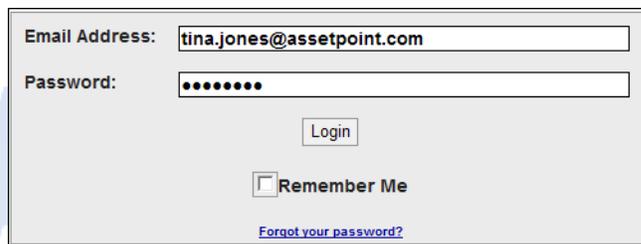
6. Downloading POs

Users setup to receive PO notifications will receive a notification via email when a Purchase Order has been issued to their company.

1. Click on the [TabSource](#) link shown in the email below to access the RFQ.



2. Login with your email address and password.



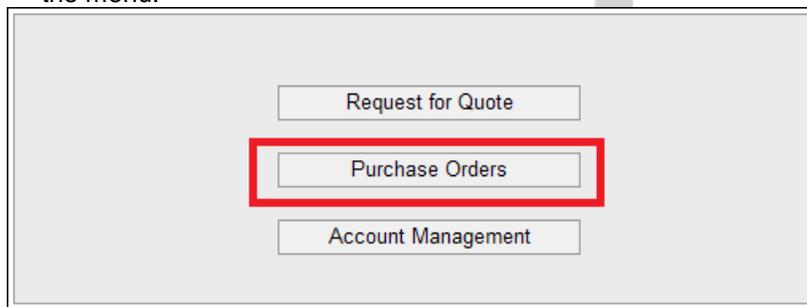
Email Address:

Password:

Remember Me

[Forgot your password?](#)

3. If you are a user with access to both RFQs and POs, then select the Purchase Order option from the menu:



4. If you only have access to POs you will be taken directly to the PO Home screen:

PO#	Location	Buyer	Issued	Lines	Status
[All]	[All]	[All]	< [All]	[All]	[All]
N469696-0000-002	Plant - Indiana Harbor (094)	Scholl, Ed	08/29/2013	1	Un-Retrieved
N469699-0000-000	Plant - Indiana Harbor (094)	George, Frank	08/30/2013	2	Un-Retrieved
N469699-0000-001	Plant - Indiana Harbor (094)	George, Frank	08/30/2013	1	Un-Retrieved
N469699-0000-002	Plant - Indiana Harbor (094)	George, Frank	08/30/2013	2	Un-Retrieved
N469704-0000-001	Plant - Indiana Harbor (094)	George, Frank	10/21/2013	1	Un-Retrieved
N469705-0000-002	Plant - Indiana Harbor (094)	George, Frank	10/21/2013	1	Un-Retrieved
N469706-0000-000	Plant - Indiana Harbor (094)	George, Frank	10/21/2013	1	Un-Retrieved
N469704-0000-000	Plant - Indiana Harbor (094)	George, Frank	10/21/2013	1	Un-Retrieved
N469705-0000-000	Plant - Indiana Harbor (094)	George, Frank	10/21/2013	1	Un-Retrieved
N469702-0000-001	Plant - Indiana Harbor (094)	George, Frank	10/21/2013	1	Un-Retrieved
N469780-0000-000	Plant - Indiana Harbor (094)	Bird, Sam	10/22/2013	1	Un-Retrieved
N469798-0000-000	Plant - Indiana Harbor (094)	Spolarich, Michael	10/21/2013	1	Downloaded
N469797-0000-000	Plant - Indiana Harbor (094)	Spolarich, Michael	10/21/2013	1	Downloaded
C196430-0000-000	Plant - Columbus (092)	Soinger, Holly	10/23/2013	1	Downloaded

- The PO home screen will list all POs available for download. POs that have not been downloaded will be listed first with a status of Un-Retrieved. Next a list of POs that have been downloaded will be listed with a status of Downloaded.

To download a PO:

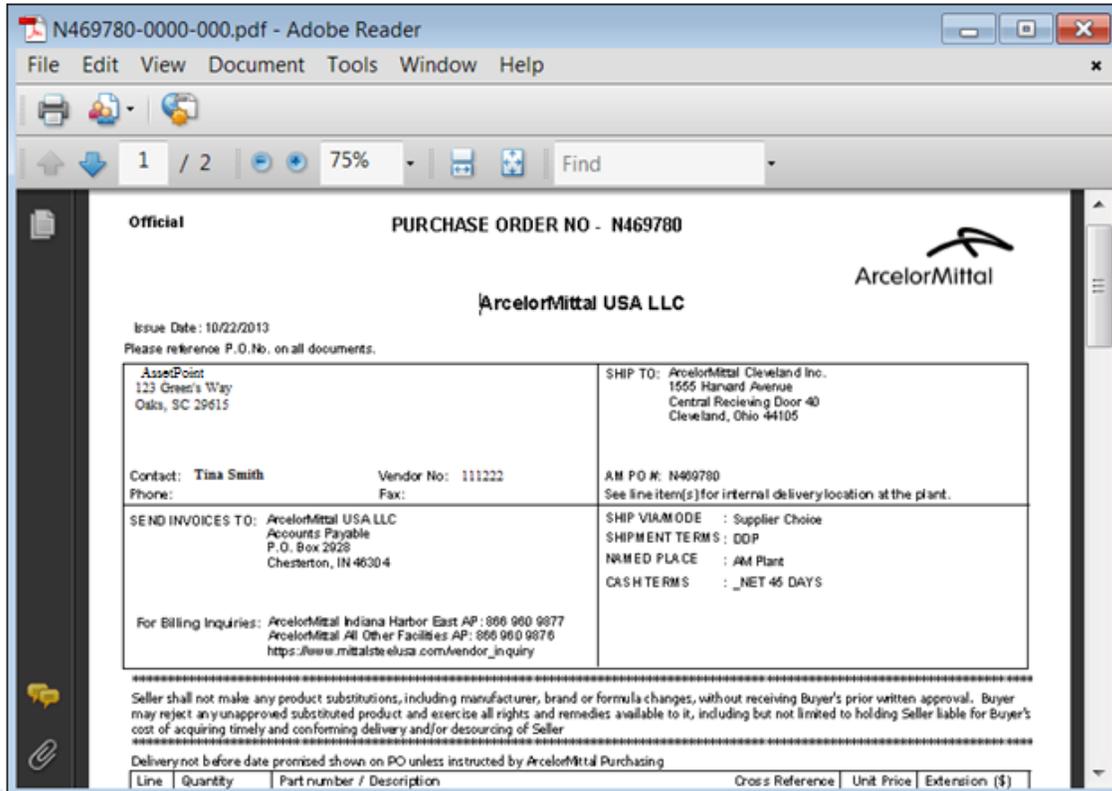
- Click on the PO that you would like to download.
- Depending on your browser, you will have the option to **Open** or **Save** your PO.

PO#	Location	Buyer	Issued	Lines	Status
[All]	[All]	[All]	< [All]	[All]	[All]
N469699-0000-000	Plant - Indiana Harbor (094)	George, Frank	08/30/2013	2	Un-Retrieved
N469704-0000-001	Plant - Indiana Harbor (094)	George, Frank	10/21/2013	1	Un-Retrieved
N469699-0000-001	Plant - Indiana Harbor (094)	George, Frank	08/30/2013	1	Un-Retrieved
N469705-0000-002	Plant - Indiana Harbor (094)	George, Frank	10/21/2013	1	Un-Retrieved
N469696-0000-002	Plant - Indiana Harbor (094)	Scholl, Ed	08/29/2013	1	Un-Retrieved
N469706-0000-000	Plant - Indiana Harbor (094)	George, Frank	10/21/2013	1	Un-Retrieved
N469704-0000-000	Plant - Indiana Harbor (094)	George, Frank	10/21/2013	1	Un-Retrieved
N469705-0000-000	Plant - Indiana Harbor (094)	George, Frank	10/21/2013	1	Un-Retrieved
N469699-0000-002	Plant - Indiana Harbor (094)	George, Frank	08/30/2013	2	Un-Retrieved
N469780-0000-000	Plant - Indiana Harbor (094)	Bird, Sam	10/22/2013	1	Downloaded
N469798-0000-000	Plant - Indiana Harbor (094)	Spolarich, Michael	10/21/2013	1	Downloaded
N469702-0000-001	Plant - Indiana Harbor (094)	George, Frank	10/21/2013	1	Downloaded
N469797-0000-000	Plant - Indiana Harbor (094)	Spolarich, Michael	10/21/2013	1	Downloaded
C196430-0000-000	Plant - Columbus (092)	Soinger, Holly	10/23/2013	1	Downloaded

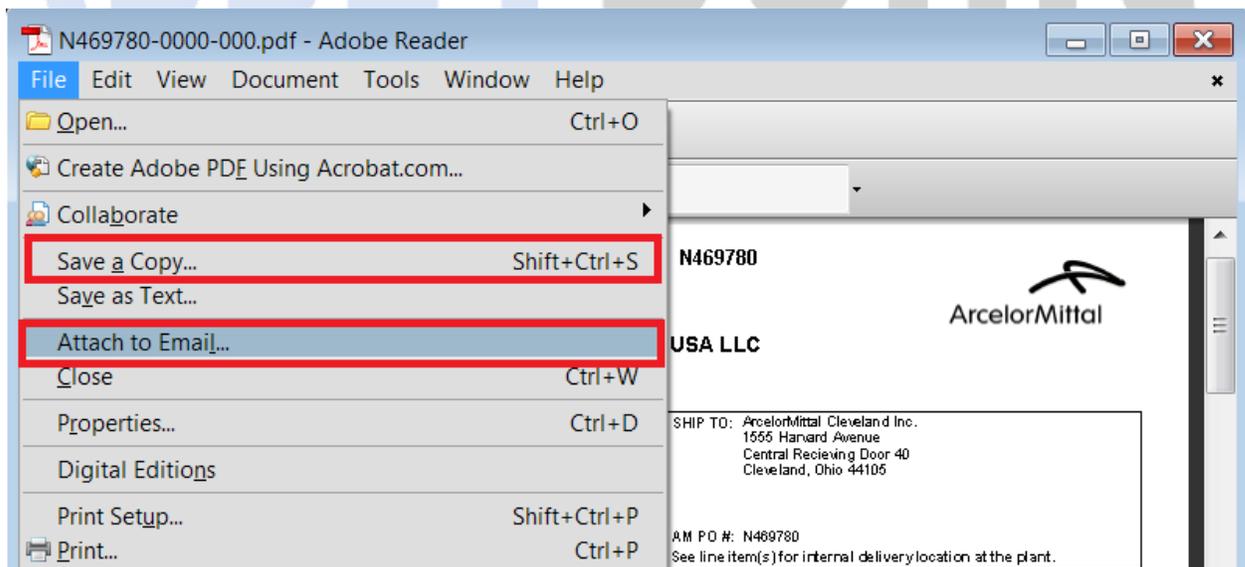
Do you want to open or save **N469780-0000-000.pdf** (44.8 KB) from **apvs13**?

Open Save Cancel

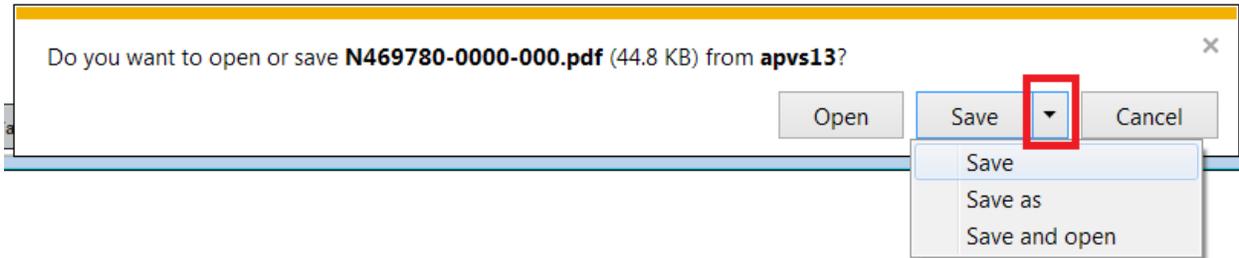
- Selecting the **Open** option will open the pdf version of the PO.



- a. Once opened you can print  the pdf if you wish.
- b. You can also **Save** the pdf or **Attach** the pdf to an email to send a manager.



9. Instead of selecting the **Open** option when downloading the PO, you can also select **Save**.



- a. Selecting **Save** will save the pdf file to your browsers default Downloads folder.
- b. Selecting **Save as** will give you the option to pick where you would like to save the PO.
- c. Selecting **Save and open** will save the pdf file to your browsers default Downloads folder and then open the pdf file.

7. PO Late Notifications

A supplier will receive an email notice the day after a PO has been issued. The notice is just a reminder that you have a PO in the system that has not been downloaded. Only users with the **Notifications For: PO** option selected will receive emails.

Subject: An issued PO has not been viewed

This notification is to alert you that a purchase order was issued on 10/22/2013 but has not yet been retrieved.

- Plant: ArcelorMittal Indiana Harbor LLC
- PO: N469780
- Release: 0000
- Change Order: 000

You can access this purchase order via the supplier portal at [TabSource](#)

8. User Administration

As an Administrator, you will have the ability to

- add new users
- turn on RFQ bid notifications for each user
- disable users
- unlock a user account
- and reset passwords.

To access the user administration section, click on the Account link, located at the bottom of your screen.



8.1 Adding User

2. From the Account section, click on the User Management tab:

First Name	Last Name	EEmail	Account Actions					
t	j	[All]	New User					
Timothy	Joneson	tim.joneson@assetpoint.com	Notified RFQ	PO	Has Access RFQ	PO	Account Enabled	Locked
Tina	Johnson	test.test@test.com						
Tiffany	James	tiffany.james@ap.com						

3. Click the New User button. The New User form will open.

Maintain TabSource User Information

First Name:

Last Name:

Phone Number:

Receiving RFQs/POs from:

Not receiving RFQs/POs from:

- AMUSA - Burns Harbor
- AMUSA - Cleveland/Columb
- AMUSA - Coatesville
- AMUSA - Conshohocken
- AMUSA - Georgetown

Login ID / Email:

Confirm Login ID / Email:

Access To: RFQ PO

Notification For: RFQ PO

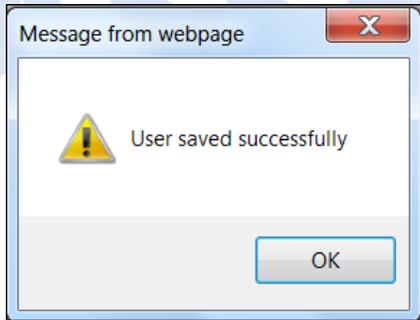
Security: Enabled Admin

4. Populate the First Name, Last Name, and Phone Number the user's information.
5. Update the **Receiving RFQs/POs from:** with all the locations the user wishes to receive RFQs and/or POs.
6. Enter the email address in the **Login ID/Email** field. Confirm the email by re-entering the email in the **Confirm Login ID/Email** field.
7. Update the following checkboxes appropriately:
 - a. **Access To:**
 - i. RFQ – Selected, the user will have access to issued RFQs.
 - ii. PO – Selected, the user will have access to newly issued POs.
 - b. **Notification For:**
 - i. RFQ – Selected, the user will receive RFQ bid notifications via email.
 - ii. PO – Selected, the user will receive PO notifications via email.
 - c. **Security:**
 - i. Enabled – Selected, the user will be enabled and allowed to login to the system.

- ii. Admin – Selected, the user will have Admin rights. This allows the user to create new users and update the profiles of existing users. Users that do not have Admin access will only be allowed to update their notification access.

NOTE: At least one person, at each assigned plant, must be assigned to receive notifications.

8. Save your Changes.



8.2 RFQ and PO Notifications

A user has the option of receiving RFQ Bid notifications via email. From the User Management tab clicking on the notification icon will enable notifications . Clicking on the icon again will disable the notifications . The same is true for PO notifications.

8.3 Disable Users

Users can be disabled to prevent access to the TabSource portal. From the User Management tab clicking on the disable icon will disable a user . Clicking the icon again will enable the user .

8.4 Unlock Accounts

A user's account will become locked if the password is incorrectly entered more than 5 consecutive times.

A pad lock  will appear on the account showing that the account is locked.

First Name	Last Name	E-Mail	Account Actions			
t	j	[All]	New User			
			Notified RFQ PO	Has Access RFQ PO	Account Enabled Locked	
Tiffany	James	tiffany.james@ap.com				

Clicking on the pad lock  will unlock a user's account.

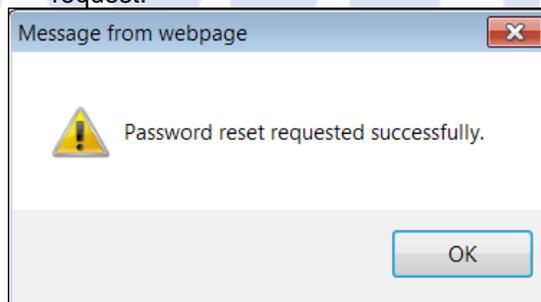
8.5 Reset Passwords

Users have the ability to reset their own password by clicking on the **Forgot Password** link on the login page.

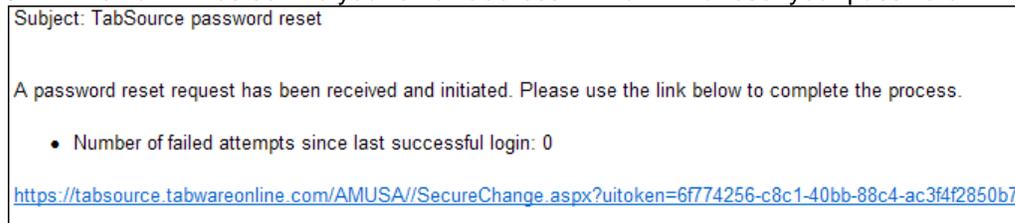
Email Address:	<input type="text"/>
Password:	<input type="password"/>
<input type="button" value="Login"/>	
<input type="checkbox"/> Remember Me	
Forgot your password?	

To reset your password

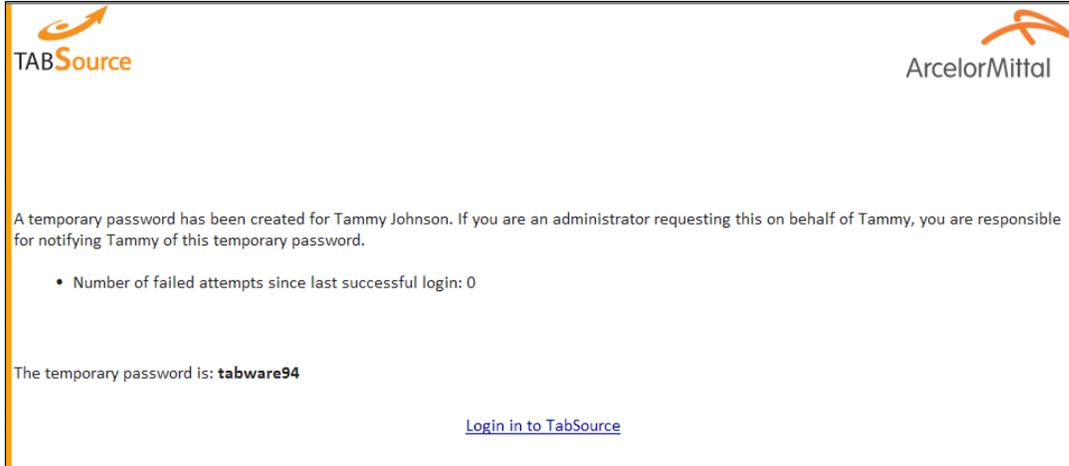
1. Enter your email address
2. Click the **Forgot your password** link. A message will display confirming your password reset request:



3. An email will be sent to your email address with a link to reset your password.

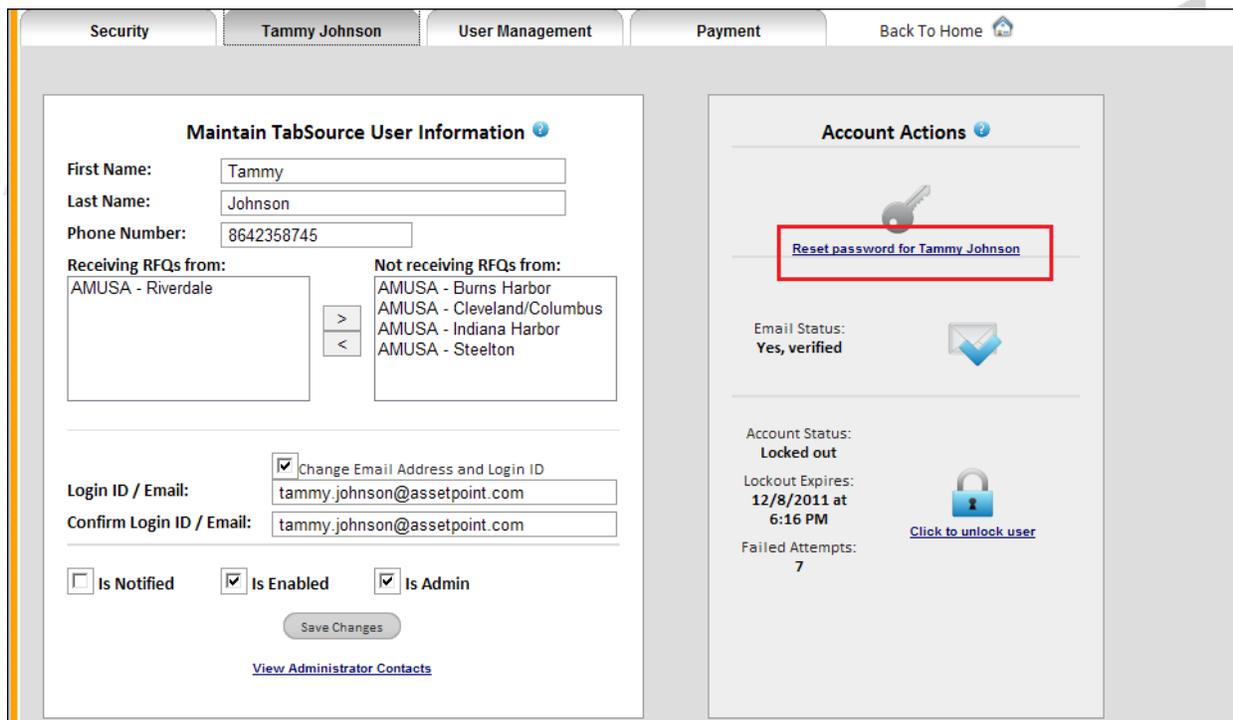


4. Click on the link to generate a new temporary password.



5. The new temporary password for this password reset is tabware94. Click the **Login to TabSource** link to be taken to the login screen.
6. Login with your email address and temporary password.
7. Once you login, you will be prompted to create a permanent password.

As an Admin, you may also reset a user's password. To send a reset password email to a user, view the user's profile record. Click the **Reset password for xxxxx** link. This will generate an email and a temporary password for the user.



9. Additional Help

For additional help with using TabSource (for example, on submitting bids, declining bids and declining bid lines) please visit the Help section . Training videos and FAQs (Frequently Asked Questions) are available here.

The training video can also be viewed by access this link:

<https://tabsource.tabwareonline.com/AMUSA/Help/TrainingVideo/TabSourceTheatre.html>

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10. Revision History

Revision History				
Project	Version	Date	User	Description
10879	71.001	7/5/2011	T. Burton	Initial Creation
10879	71.002	7/25/2011	T. Burton	Text Updates
10879	71.003	12/8/2011	T. Burton	Screen and functionality Updates
10879	71.004	4/10/2012	T. Burton	Changed the registration process
10879	71.005	5/31/2012	T. Burton	Updated TS email address
11190	71.001	10/9/2013	T. Burton	Updated guide for new user profile screen, new screen shots
11190	71.002	12/13/2013	T. Burton	Updates for the tier changes
11190	71.002	1/22/2014	T. Burton	Updating screen shots and tier changes

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