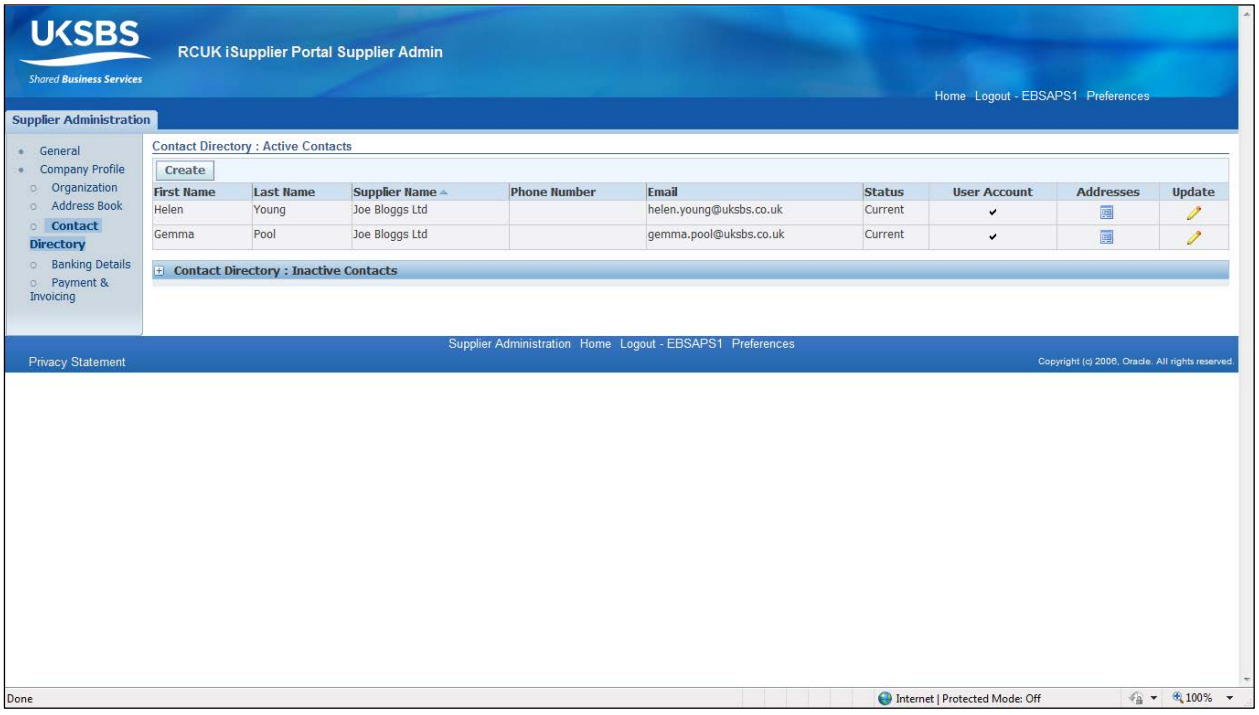
1 Appendix 1

1.1 Updating a Company Contact

Company contacts can be updated at any time, for example name or telephone number changes.

1. Click the RCUK iSupplier Portal Supplier Admin link.
2. Click the Contact Directory link.



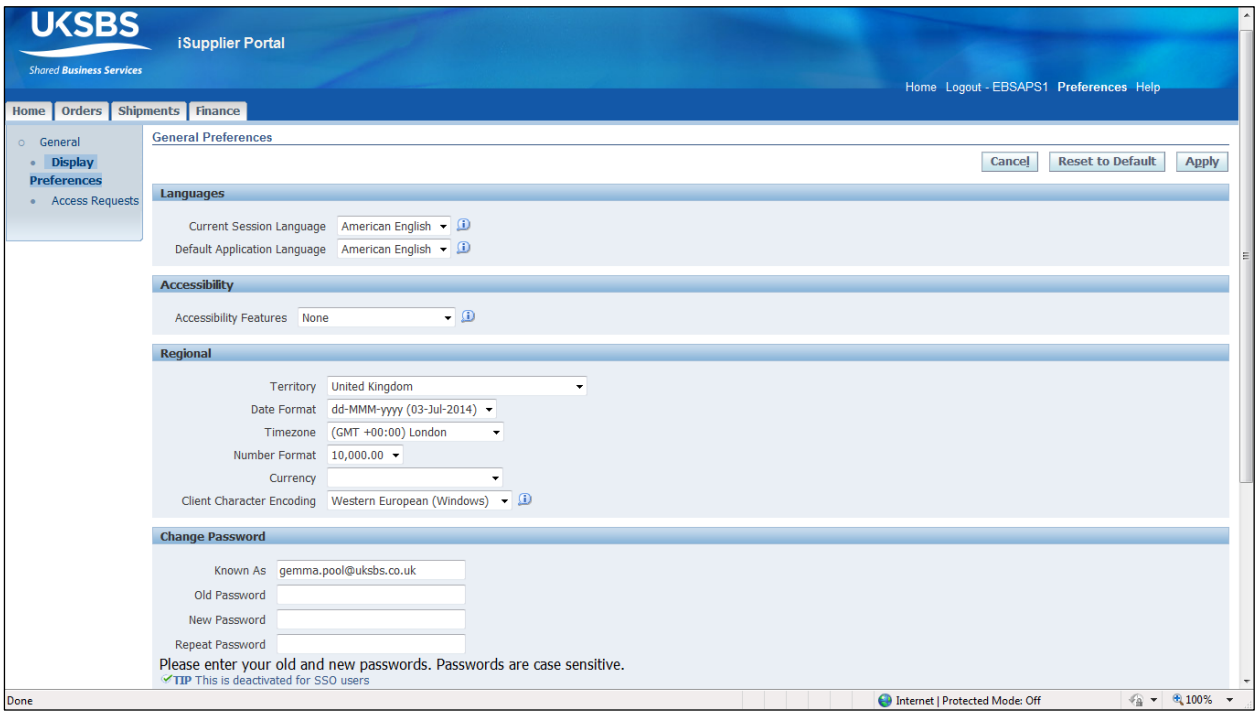
3. Click the Update button next to the relevant record.
4. Amend details.
5. Click the Apply button.
6. Your company contact has now been updated.

2 Appendix 2

2.1 Changing your Email Preferences

iSupplier will send you an email for every notification you receive. If you find that you are receiving too many emails, you can change your preferences to either receive a daily summary email or no emails at all.

1. Click the Preferences link.



2. Click the Email Style drop-down list and select the relevant style:

- HTML mail with attachments - is the default email setting which will email you each time you receive a notification.
- HTML summary mail **-** will email you once a day with a summary of all your notifications.

Caution Note:

Please do not use Disabled.

3. Click the Apply button.
4. You have successfully updated your Email Preferences.

3 Appendix 3

3.1 iSupplier Worklist

Your Worklist displays all important messages from UK SBS and it's associated Research Councils and Organisations. It is important to manage these messages, called notifications, and to either mark them as read or actioned when they have been dealt with.

Learning Note:

Your Worklist can be seen on your Home Page where it will show the last 5 unread notifications.

To view all your notifications, click on the Full List button.

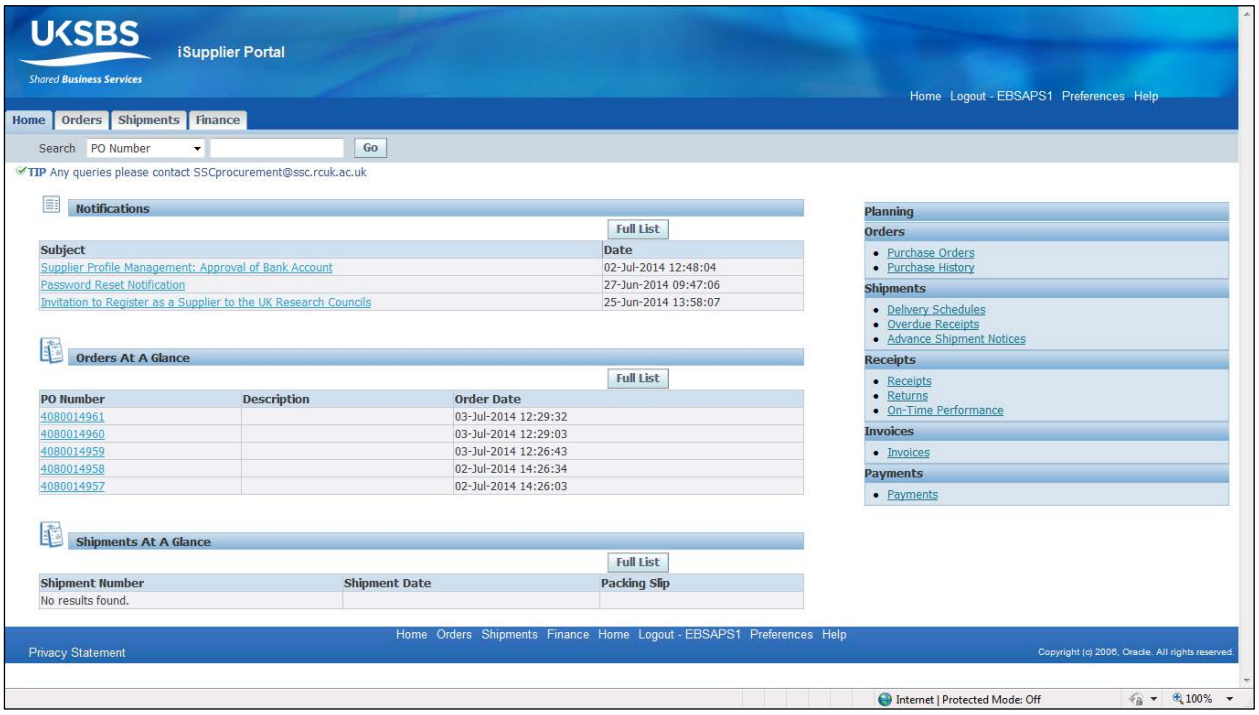
To mark your notifications as read, open the message and either click on OK or an action button such as Approve. All read notifications will disappear from your Worklist but you can still view them by clicking on Full List and selecting the All Notifications view.

You will receive two types of notifications:

- For Your Information (FYI) Notifications - These notifications are for information purposes only. You must click on OK before these notifications are marked as read.
- To Do Notifications - These notifications require an action (e.g. Approval). You must action these notifications before they are marked as read.

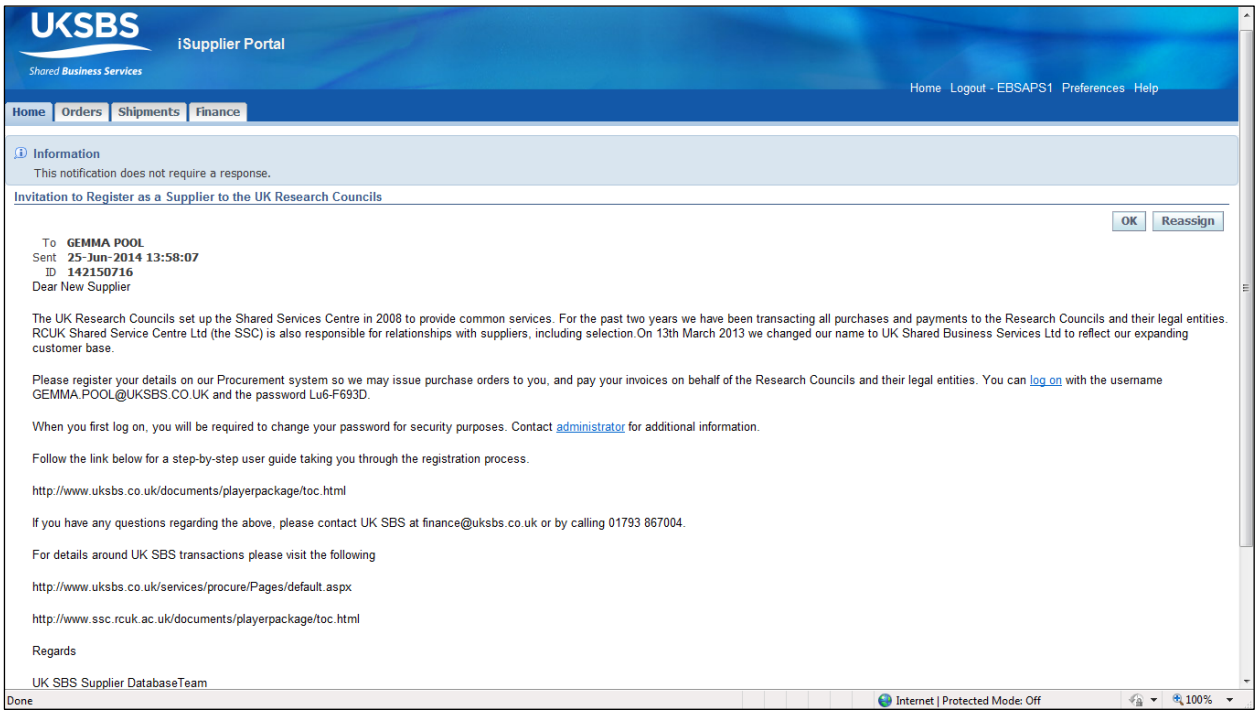
Notifications you will receive include the following:

- New Purchase Orders (FYI Notification)
- Approved Purchase Order Changes (FYI Notification)
- Rejected Purchase Order Changes (FYI Notification)



1. You will see your last 5 unread messages under Notifications.

2. To open a notification, select it from the list.



3. Review the notification and click the OK button to mark the message as read.

Learning Note:

Notifications may include attachments depending on the type of notification. These can be viewed by clicking the link within the References section.

4. The notification has now been removed from your unread notifications list.

5. To view all notifications click the Full List button.

6. This screen will display 25 notifications at a time. If there are more than 25 a Next 25 link will become available.

Learning Note:

Multiple notifications can be read or closed at the same time, click the Select All link.

7. Click the Open button to read or action all selected notifications.

8. All the read notifications have now disappeared from your view.

9. To view read/closed notifications click the View drop-down list and select All Notifications.

10. You can view the following groups of notifications:

- All Notifications
    - Displays all notifications, including closed notifications
- FYI Notifications
    - For Your Information notifications that have not been marked as read
- Notifications From Me
    - Notifications that you have sent, for example to UK SBS when you add a company address or bank account.
- To Do Notifications
    - Notifications that require an action or response. These notifications cannot be closed without the required action or response.

11. Click the Go button.

12. All Open, Closed and Cancelled notifications can be seen here.

4 Appendix 4 - Managing your Pop-Ups

Action Note:

Pop-Ups are a setting on your PC. Please liaise with your IT contact if required.

4.1 Google Chrome

4.1.1 Allow all pop-ups

You can allow all pop-ups by turning off Chrome's pop-up blocker. Here's how:

1. Computer:

1. In the top-right corner of the browser window, click the Chrome menu .
2. Select **Settings**.
3. Click **Show advanced settings**.
4. Under "Privacy," click the **Content settings** button.
5. Under "Pop-ups," select **Allow all sites to show pop-ups**.

Using a Chrome device at work? Your network administrator might configure the pop-up blocker for you, in which case you can't change this setting yourself.

2. Mobile device:

1. Open the Chrome menu.
2. Touch **Settings**.
3. Touch **Content Settings**.
4. Touch **Block Pop-ups** to turn all pop-ups ON.

4.1.2 Manage pop-ups for a specific site

To manually allow pop-ups from a site, follow the steps below:

1. At the end of the address bar, click the pop-up blocker icon .
2. Click the link for the pop-up window you'd like to see.
3. To always see pop-ups for the site, select "Always show pop-ups from [site]." The site will be added to the exceptions list, which you can manage in the Content Settings dialog.

To always allow pop-ups from a particular site, follow the steps below:

1. In the top-right corner of the browser window, click the Chrome menu .
2. Select **Settings**.
3. Click **Show advanced settings**.
4. Under "Privacy," click the **Content settings** button.
5. Under "Pop-ups," click **Manage exceptions**.

4.2 Internet Explorer

Pop-up Blocker limits or blocks pop-ups on sites that you visit. You can choose the level of blocking you prefer, turn on or off notifications when pop-ups are blocked, or create a list of sites that you don't want to block pop-ups on. Pop-up Blocker settings only apply to Internet Explorer for the desktop.

Turn Pop-up Blocker on or off

4.2.1 Internet Explorer 8.0 (Windows 7/Vista/XP)

When a website attempts to launch a new pop-up window, you may see dialog boxes alerting you of pop-up windows that have been blocked. Follow the instructions below to allow pop-up windows on a per-website basis.

1. Open Internet Explorer, then go to the web page that you want to allow pop-ups.
2. In Internet Explorer's Address field, highlight the entire web address of the current page, then right-click and choose the Copy command.
3. From the Tools menu, select Pop-up Blocker → Pop-up Blocker Settings. The Pop-up Blocker Settings dialog box opens.
4. Right-click in the **Address of website to allow:** field, then choose Paste.

Learning Note:

Pasting the web address of a page you wish to allow pop-ups is recommended, rather than typing the generic main web address. For example, you might visit **www.example.com/requirepopup.html**, but the page is actually hosted at **popup.example.com/forms/popupform.html**. In this example, you must allow popup.example.com, not www.example.com. Note also that entire websites must be allowed, not individual directories or pages, so in this example Internet Explorer will automatically add the top level **popup.example.com** to its Allowed sites.

For more information about pop-ups, see *Pop-up Blocker FAQ*, located at the bottom of the dialog box.

1. Click **Add**. The selected website is added to the list of Allowed sites.
2. Click **Close** to close the Pop-up Blocker Settings dialog box.

4.2.2 Internet Explorer 9.0 (Windows 7/Vista)

When a website attempts to launch a new pop-up window, you may see dialog boxes alerting you of pop-up windows that have been blocked. Follow the instructions below to allow pop-up windows on a per-website basis.

1. Open Internet Explorer, then go to the web page that you want to allow pop-ups.
2. In Internet Explorer's Address field, highlight the entire web address of the current page, then right-click and choose the Copy command.
3. From the Tools menu (the gear icon on the far right), select Internet options. The Internet Options dialog box opens.
4. Click on the Privacy tab.
5. Under Pop-up Blocker, click **Settings**. The Pop-up Blocker Settings dialog box opens.
6. Right-click in the **Address of website to allow:** field, then choose Paste.

Learning Note:

Pasting the web address of a page you wish to allow pop-ups is recommended, rather than typing the generic main web address. For example, you might visit **www.example.com/requirepopup.html**, but the page is actually hosted at **popup.example.com/forms/popupform.html**. In this example, you must allow popup.example.com, not www.example.com. Note also that entire websites must be allowed, not individual directories or pages, so in this example Internet Explorer will automatically add the top level **popup.example.com** to its Allowed sites.

For more information about pop-ups, see Learn more about Pop-up Blocker, located at the bottom of the dialog box.

1. Click **Add**. The selected website is added to the list of Allowed sites.
2. Click **Close** to close the Pop-up Blocker Settings dialog box and click the **OK** button to close the Internet Options dialog box.

4.3 Firefox .current (Windows/OS X)

1. Open Firefox, then go to the web page that you want to allow pop-ups.
2. In Firefox's URL window, highlight the entire web address of the current page, then choose the Copy command from the Edit menu.
3. Select **Options...** from the Tools menu (Windows) or **Preferences...** from the Firefox menu (OS X). The Options (Windows) or variable (OS X) dialog box opens.
4. In the top panel of the dialog box, click on the Content icon to display the Content dialog box.
5. In the Content dialog box, ensure the **Block pop-up windows** checkbox is selected, then click the adjacent **Exceptions...** button.
6. Right-click or control-click in the **Address of web site:** field, choose Paste from the dropdown menu, then click **Allow**. The selected webpage is added to the list of Allowed Sites.

Learning Note:

Pasting the web address of a page you wish to allow pop-ups is recommended, rather than typing the generic main web address. For example, you might visit **www.example.com/requirepopup.html**, but the page is actually hosted at **popup.example.com/forms/popupform.html**. In this example, you must allow popup.example.com, not www.example.com. Note also that entire websites must be allowed, not individual directories or pages, so in this example Internet Explorer will automatically add the top level **popup.example.com** to its Allowed sites.

7. Close any remaining dialog boxes.

Caution Note:

Even if you turn pop-up blocker on, Internet Explorer won't block pop-ups from sites that are in the Local intranet or Trusted sites security zones. If you want to block all pop-ups—including pop-ups on Local intranet or Trusted sites—you'll have to change the blocking level.