Manual

MANAGEMENT OF COORDINATOR AND CONTACT PERSONS

Iberdrola Group -
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1. **DESIGNATING THE COORDINATOR AND CREATING CONTACT PERSONS**

The first time you access the SRM application, by default the system will display the window “Contact Person Management”, where the following message will appear prompting you to name a user and password Coordinator for all the persons at your company who log in to SRM:

![Identify a Security Coordinator]

The Coordinator mainly acts as a centralised SRM user and password manager within your company and is the only person with the power to reset the password if locked or forgotten. Once designated in the system, the Coordinator will receive an email containing a security code with which they can access the tool and perform actions that are exclusive to the Coordinator. With this security code, the Coordinator can:

a) Unlock the user after too many failed login attempts.
b) Process new password requests from other persons who forgot it.
c) Name another Coordinator to replace them.
d) Update their details as Coordinator.
e) Change the security code.

The first time you log in to our SRM application, you must designate the Coordinator from among all the Contact Persons that exist in the system. The person requesting access to SRM and who has received the user and password for the first time will appear as the first Contact Person in the tool:
There are two options:

1.1 **Designating the first Contact Person as the Coordinator:** you can select the person already created as the first Contact Person and designate them to be the user and password Coordinator. To do so, select the entire line by left-clicking on it and then click on “Assign/Change Coordinator”:

The following window will appear asking you to confirm your choice. Click on “Ok” to continue:
You will receive the following confirmation message and the recently-designated Coordinator will receive an email, at the provided email address, containing their security code:

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This is an automatically generated email. Please do not reply.

Dear Supplier,

You have been invited to participate in any of the tendering processes. In order to continue with the process, you need to register and log in to the system.

The Supplier Relationship Management application allows you to access information about your activity with Iberdrola through the web and track your orders. If you have any questions, please feel free to contact us.

Coordinator security code: XXXXXXXX

You can change this code and you can also change the coordinator by selecting and confirming another contact person within your company. This option is available once in the system, in the "Contact Person Management" section.

For further information or help, please contact your corresponding Supplier Help Desk whose details are available in the SRM homepage, in the "Contact" section.

Best Regards,

Iberdrola Group Purchases
1.2 **Creation of multiple Contact Persons and designating the Coordinator:** Alternatively, you can first create one or more additional Contact Persons and then select one to be Coordinator at your company. To do so, click on “Contact Person Management” in the section “Suppliers”, where the company details will be displayed:

Select your company's line by left-clicking on it and then click on “Create Contact Person With Reference”:

A new window will appear containing a form where you have to complete at least the required fields.

In the tab "Contact Person Data":

- Title
- First name
- Last name
- Language
In the tab "Contact Data" -

- Telephone number
- Country
- Standard (just select this button)
- E-mail address. Bear in mind that this email address will be used for all system notifications and password changes.
- Standard (just select this button)

Select the phone number country from the drop-down list: -
Complete all required fields and click on "Save":

A message will appear confirming that the Contact Person has been created successfully. Click on "Close" to return to the previous screen:
To view the Contact Person that you have just added in the section “Contact Persons”, click on “Refresh”:

You can repeat this process to create as many Contact Persons as you wish and then designate one to be Coordinator, as described above. As soon as the Coordinator has been designated, they will receive an email containing the security code, and all other Contact Persons will receive an email telling them who the Coordinator is at their company:
If after your first log on you want to add more Contact Persons, you will have to follow this same procedure.

1.3 **Viewing and modifying Contact Persons**: you can view and change the details of the Contact Persons at any time in the section “Contact Person Management” by selecting the line you wish to view/process and then selecting the corresponding option: