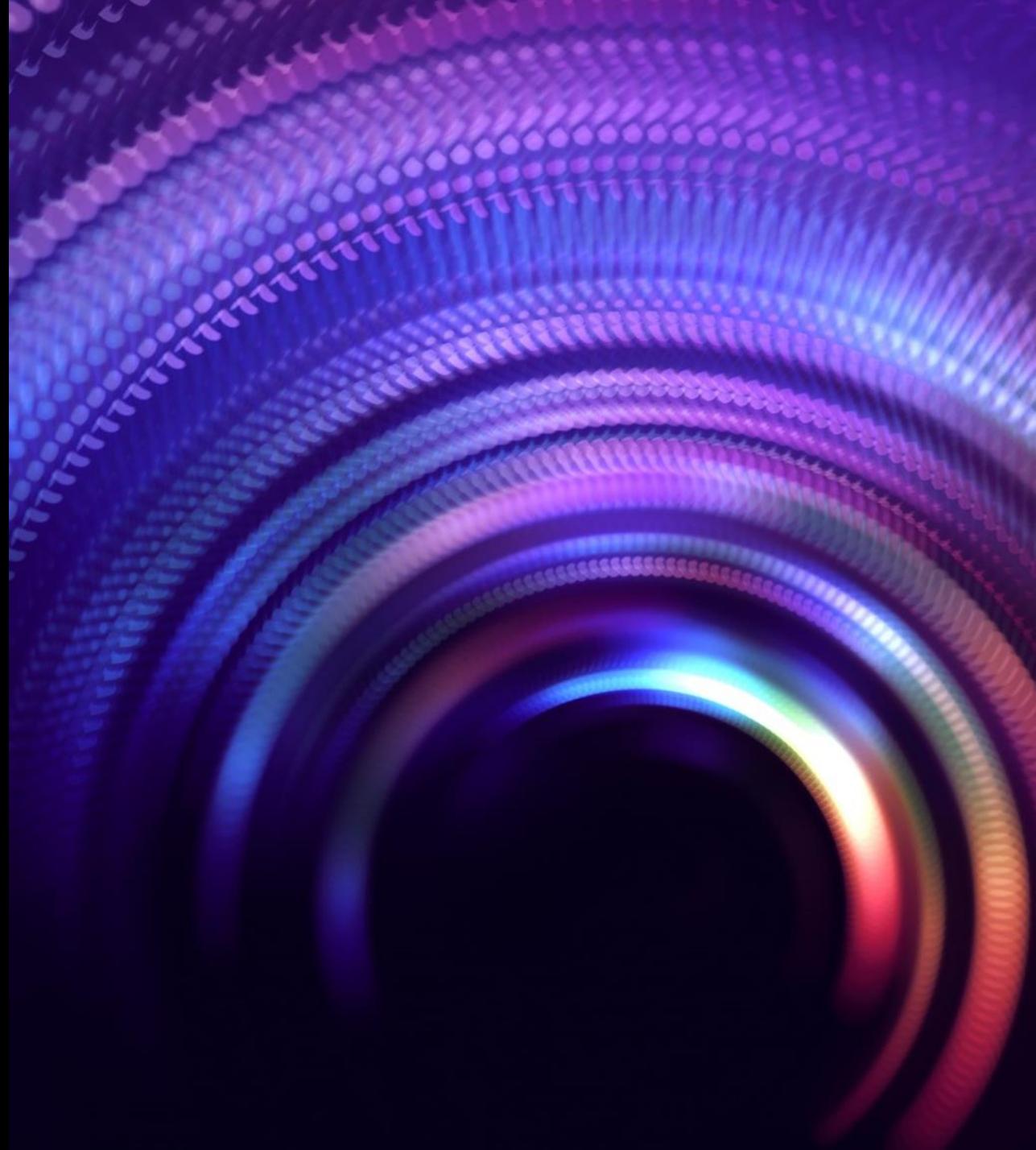


Macquarie MySupplier

Frequently Asked Questions



How do I log in to Macquarie MySupplier?

When you have an assessment to complete you will receive the below email. Simply click the link to access the portal.

Macquarie MySupplier: Action required - Macquarie Supplier Assessment - Supplier A Pty Ltd- General Assessment

 Macquarie MySupplier <cogmysupplierundeliverable@mysupplier.macquarie.cor>
To  James.Smith@suppliera.com
Cc

← Reply ← Reply All → Forward

Dear James Smith,

Macquarie requires all suppliers to participate in initial due diligence and ongoing governance assessments. These processes are fundamental to our ability to meet certain legal and regulatory requirements and ensuring the ongoing delivery of services to our clients, shareholders and the financial markets.

Macquarie utilizes the Macquarie MySupplier platform to complete all supplier assessments. The deadline to submit this assessment is 15-Oct-2022.

You can access the assessment by clicking this LINK and entering your username and password.

<https://apac-portal.processunity.net/macquarie-test1/Default.aspx?language=0>

Your username is: James.Smith@suppliera.com

Your password will follow in a separate email.

You will be required to change your password upon logging in for the first time.

Note: This is an automated email message.

I'm already a supplier to Macquarie, do I need to register for Macquarie MySupplier?

No, the primary contact for all existing suppliers will automatically be registered to your Macquarie MySupplier account. You will not need to provide any information in Macquarie MySupplier until next time you have an assessment to complete.

I have tried to reset my password, but I am not receiving any password reset emails. What should I do?

First check your junk and spam folders, or try searching 'Macquarie MySupplier' in your emails. If you're still unable to locate it then contact your Relationship Manager or our support team: Vendor.Support@macquarie.com. Ensure you include 'MySupplier' in the subject line.

What do I do if I forget my password?

Select the Forgot Password option on the login screen.

MACQUARIE | MySupplier

Supplier Portal

Username

Password

Save Username on this device Login >

[Forgot Password](#) | [Change Password](#)

Can I change my password?

Yes, select the Change Password option on the login screen.

MACQUARIE | MySupplier

Supplier Portal

Username

Password

Save Username on this device Login >

[Forgot Password](#) | [Change Password](#)

Is my data in Macquarie MySupplier protected and secure?

Macquarie is committed to keeping data in Macquarie MySupplier protected and secure. We have technology and security policies, procedures and processes in place to protect the information we hold. For more information refer to the [Macquarie Group Privacy Policy](#), your confidentiality or service agreements, or reach out to your Macquarie Relationship Manager or our support team: Vendor.Support@macquarie.com. Ensure you include 'MySupplier' in the subject line.

Do I need to provide my company information when I first log in?

No, your basic information will be carried across to Macquarie MySupplier. There is no need to provide any additional information until you have an assessment questionnaire to complete. The new Macquarie MySupplier platform will take you through a tailored assessment, and all your data will be saved for future assessments.

How can I update my personal information?

Navigate to the contacts tab and click on your name. Then click the *edit* button to change your details.

The screenshot shows the user profile page for James Smith. The left sidebar contains a 'PORTAL' menu with options: Home, Contacts (highlighted), All Assessments, and Open Findings. The main content area shows the user's details for 'James Smith / Details' (Individual - Active). At the top right of this section are buttons for 'deactivate', 'terminate', 'reset password', and 'edit' (highlighted). Below this is a table of user information:

Field	Value
First Name	James
Last Name	Smith
▼ Contact Info	
Id	432028
Title	Account Manager
Phone Number	12345678
Email Address	James.Smith@suppliera.com
City	Sydney
Country	Australia
Business Division	Triage Team
Department	[Not Set]
User ID	[Not Set]
Username	James.Smith@suppliera.com
Auto-Deactivate Date	[Not Set]
Last Login Date	[Not Set]

Can I add team members to MySupplier?

Yes, Navigate to the contacts tab then select *Create New Contact*. Enter their details, then click *Save*, and then click *Activate*.

PORTAL 

Home —

Contacts

All Assessments

Open Findings

Supplier A Pty Ltd / Contacts
Suppliers

Create New Contact...

Related Contacts

Name	State	Email
------	-------	-------

PORTAL 

Home —

Contacts

All Assessments

Open Findings

← [Not Set] / Details
Individual - Inactive

save and return cancel **save**

First Name

Last Name

PORTAL 

Home —

Contacts

All Assessments

← **Supplier Contact / Details**
Individual - Inactive

activate terminate **edit**

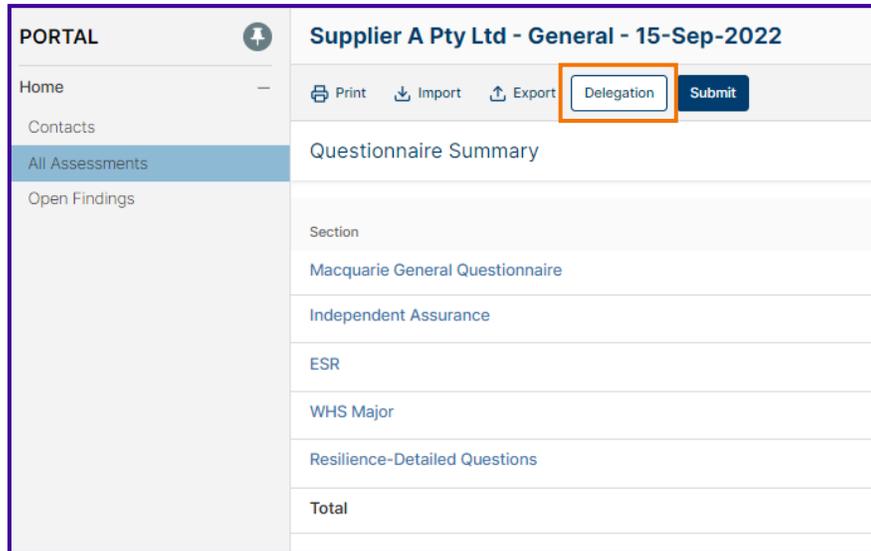
First Name

Last Name

Supplier Contact

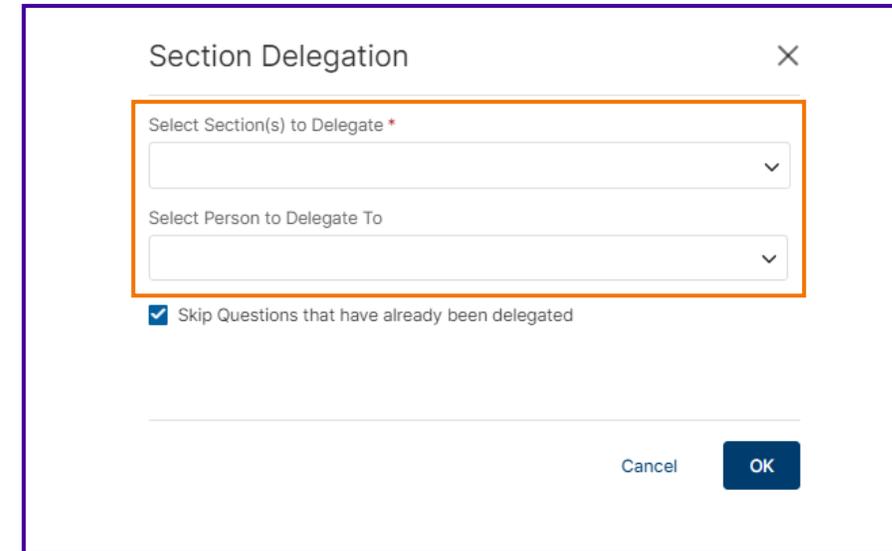
Can I delegate work to a colleague?

Yes, you can assign work to a colleague within the platform, to ensure the right person provides the right response. When you have identified the right colleague, they will need to be loaded as a contact (see previous question). Then click the *Delegation* button within an assessment to reassign work. You can choose to assign an entire assessment, or specific selected questions



The screenshot shows the 'Supplier A Pty Ltd - General - 15-Sep-2022' assessment page. The left sidebar contains 'PORTAL' with a notification icon, and a menu with 'Home', 'Contacts', 'All Assessments' (highlighted), and 'Open Findings'. The main content area has a top bar with 'Print', 'Import', 'Export', 'Delegation' (highlighted with an orange box), and 'Submit' buttons. Below this is a 'Questionnaire Summary' table with the following rows:

Section
Macquarie General Questionnaire
Independent Assurance
ESR
WHS Major
Resilience-Detailed Questions
Total



The screenshot shows the 'Section Delegation' dialog box. It has a close button (X) in the top right corner. The dialog contains two dropdown menus, both highlighted with an orange box: 'Select Section(s) to Delegate *' and 'Select Person to Delegate To'. Below the dropdowns is a checkbox labeled 'Skip Questions that have already been delegated' which is checked. At the bottom right, there are 'Cancel' and 'OK' buttons.

A colleague has left the company/gone on leave.
Can I deactivate their profile?

Yes, navigate to the contacts tab then select the relevant contact. Click the *Deactivate* button to temporarily disable their profile, or the *Terminate* button to permanently disable their profile.

PORTAL 

Home —

Contacts

All Assessments

Open Findings

James Smith / Details
Individual - Active

[deactivate](#) [terminate](#) [reset password](#) [edit](#)

First Name: **James** Last Name: **Smith**

Contact Info

Id	432028	Title	Account Manager
Phone Number	12345678	Email Address	James.Smith@suppliera.com
City	Sydney	Country	Australia
Business Division	Triage Team	Department	[Not Set]
User ID	[Not Set]	Username	James.Smith@suppliera.com
Auto-Deactivate Date	[Not Set]	Last Login Date	[Not Set]

Do I need to provide new information each time an assessment is required?

Your previous information will be populated each time - after you have first completed a questionnaire. When you are required to update/ resubmit an assessment you will be able to choose to retain or change your previous responses.

Will I be contacted when I have an assessment to complete?

Yes, you will receive an email notifying you of any assessments that need to be completed. You can also check this on the All Assessments screen on the portal.

The screenshot shows the 'All Assessments' page in a portal. On the left is a 'PORTAL' sidebar menu with options: Home, Contacts, All Assessments (highlighted), and Open Findings. An orange callout box labeled 'All Assessments menu option' points to this menu item. The main content area is titled 'All Assessments' and includes action buttons: Print, Export, Collapse All, a clock icon showing 'TODAY 08:06 PM', and a 'Run Report' button. Below these is a table with columns: Portal Status, Assessment Type, Assessment, Service Being Assessed, Question Progress, and Supplier Contact. The first row is highlighted in green and labeled '1. Awaiting Completion' in a callout box. The data in this row is: Portal Status (blank), Assessment Type (General), Assessment (Supplier A Pty Ltd - General - 15-Sep-2022), Service Being Assessed (Supplier A Pty Ltd), Question Progress (82 / 82), and Supplier Contact (James Smith). Another orange callout box labeled 'Assessments to be completed' points to the green row.

Portal Status	Assessment Type	Assessment	Service Being Assessed	Question Progress	Supplier Contact
	General	Supplier A Pty Ltd - General - 15-Sep-2022	Supplier A Pty Ltd	82 / 82	James Smith

How do I add documents to an assessment?

You can attach documents within your assessment by clicking the paperclip icon

The screenshot shows a web portal interface for an assessment. On the left is a sidebar menu with 'All Assessments' selected. The main content area is titled 'Supplier A Pty Ltd - General - 15-Sep-2022' and contains a question: 'Is your organisation subject to third party assurance through a Service Organisation Controls report? *'. Below the question are two radio button options: 'Yes - please attach the latest SOC / Independent Assurance report applicable to the services you will be providing to Macquarie' (which is selected) and 'No - please explain'. At the bottom of the question box are two buttons: 'Add Comment' and 'Attach File(s)'. An orange callout box with the text 'Click here to attach your document' has an arrow pointing to the 'Attach File(s)' button. The interface also includes a 'PORTAL' header, a navigation menu, and a 'Section Instructions' area.

What happens if Macquarie needs more information about an assessment I have submitted?

You will receive an email notification if Macquarie require additional information. You can then respond to the enquiry in the Assessments section of the supplier portal. The assessment that requires your attention will be marked with an alert icon. Once you open the assessment the questions you need to complete will be highlighted in blue.

PORTAL

Home —

Contacts

All Assessments

Open Findings

Supplier A Pty Ltd - General - 15-Sep-2022

Print
 Import
 Export
Delegation
Submit

Questionnaire Summary

Section	Questions Answered / Total	Percent Complete	Follow-up Questions Answered / Total	Follow-up Percent Complete
Macquarie General Questionnaire	0 / 0	0 %	-	-
Independent Assurance	1 / 1	100 %	0 / 1	0 %
ESR	32 / 32	100 %	-	-
WHS Major	29 / 29	100 %	-	-
Resilience-Detailed Questions	20 / 20	100 %	-	-
Total	82 / 82	100 %	0 / 1	0 %

Is your organisation subject to third party assurance through a Service Organisation Controls report? Delegate Question ▾

Yes - please attach the latest SOC / Independent Assurance report applicable to the services you will be providing to Macquarie

No - please explain

Add Comment Attach File(s) ▾

Answered by James Smith 9/15/2022 14:17.

Uploaded File Name Delete

Test doc.docx

Follow-up Request

Hi James, please provide your most recent independent assurance report.

Follow-up Response *

Alert

Can I see previous documents that I have uploaded?

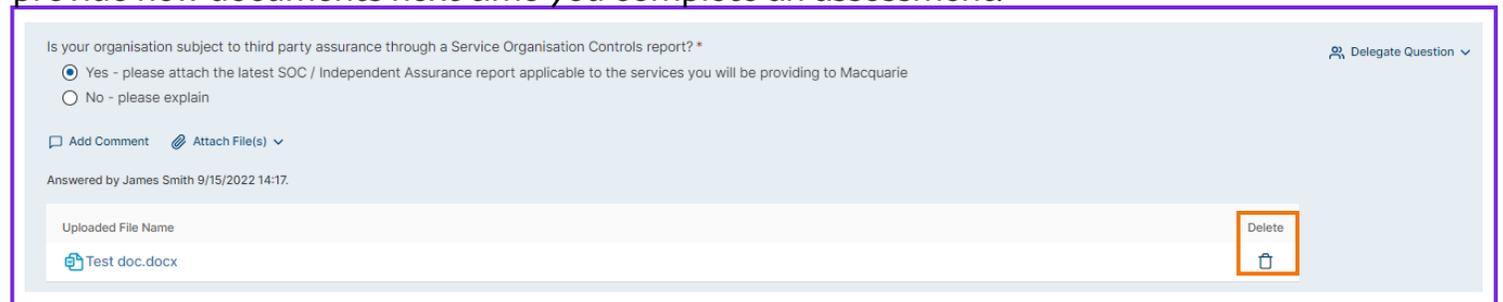
Yes, for both in-progress and previously completed assessments you can view associated attachments by clicking the attachment hyperlink.



Can I delete a document I have uploaded?

Documents that have been uploaded to in-progress assessments can be deleted by clicking the delete icon next to the attachment.

Documents uploaded to completed assessments cannot be deleted, however you will be able to provide new documents next time you complete an assessment.



What is Macquarie MySupplier replacing?

Macquarie MySupplier is a brand new system designed to decrease manual effort. Previously you worked with your Macquarie Relationship Manager to provide information manually. The Macquarie MySupplier platform will eliminate those back and forth email trails and generic questions. Macquarie MySupplier delivers assessments that are tailored to your service and allows you to submit your information online. Your information and documentation will be saved in the system for future use.

Who can I contact for help with Macquarie MySupplier?

Please contact our support team: Vendor.Support@macquarie.com and include 'MySupplier' in the subject line.

I am already registered with Coupa. Do I still need to register with Macquarie MySupplier?

Yes, you will need to register with both platforms. Coupa is our source to pay platform, through which all purchase orders, e-invoicing are managed whereas Macquarie MySupplier is focused on risk and controls assessments, ongoing due diligence and regulatory compliance obligations.

Does information provided in Macquarie MySupplier flow down to Coupa Supplier Portal or vice versa?

No, at this stage the platforms are not integrated. If you are unclear which system to use in which circumstance, please talk to your Macquarie Relationship Manager who can advise.

I am experiencing technical difficulties while completing my assessment, what should I do?

We recommend basic troubleshooting; check your internet connection, restart your browser, and clear cookies. If you still need assistance contact our support team: Vendor.Support@macquarie.com and include MySupplier in the subject line.
