



City of Atlanta  
iSupplier Training Manual

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## **Preface**

### **Preface**

This interactive reference document contains a complete description of “How-to-do Business” with the City of Atlanta (the “**City**”). The City has implemented a new purchasing application that will enable the suppliers to do business with the City through internet. This supplier application is called “iSupplier Portal.” The implemented purchasing application will also enable the suppliers to submit their responses to City’s solicitations online. This new application is called “Sourcing.”

## **Features and Functionalities**

### ***Features and Functionality***

This document contains information about the features and functionalities of the “iSupplier Portal” and Sourcing applications. Basic features include registration, monitoring purchase orders, shipments, online invoicing and bidding. There are several other advanced features that are also available.

## **Audience**

### ***Audience***

This interactive self-learning reference document is intended for all suppliers who want to do business with the City.

## Table of Contents

### *Table of Contents*

This reference document is divided into following parts:

#### **Chapter 1, “Introduction”**

This chapter defines iSupplier Portal and Sourcing applications. It answers basic questions about the application, as well as the advantage of using it to reduce the “Procure-to-Pay” time.

#### **Chapter 2, “Supplier Registration Process”**

This chapter describes how to use the “iSupplier Portal” application to register you as a supplier.

#### **Chapter 3, “Manage Supplier Information”**

This chapter describes how Suppliers would maintain their own information by accessing the City’s iSupplier Portal application.

#### **Chapter 4, “Monitor Purchase Orders”**

This chapter describes how suppliers would monitor their purchase orders and shipments details through City’s iSupplier Portal application.

#### **Chapter 5, “Submit on-line Invoices”**

This chapter describes how suppliers would use the City’s iSupplier Portal application to submit their invoices on-line.

#### **Chapter 6, “Monitor City’s open Solicitations”**

This chapter describes how suppliers would monitor the City’s open solicitations.

#### **Chapter 7, “Submit quotes on-line”**

This chapter describes how suppliers would use the City’s Sourcing application to submit their response to a City’s solicitation.

## Introduction

### Introduction

iSupplier Portal and Sourcing are the two purchasing applications that the suppliers would use to do business with the City.

iSupplier Portal is an application that enables the suppliers to log-on to City's purchasing application and allows them to monitor purchase orders, receipts, invoices and payments. This application will also allow suppliers to maintain their company's profile information themselves. Eligible suppliers can also use this application to submit their invoices online. This self-service-application will facilitate potential suppliers to register with the City.

Sourcing is an application that will enable all the suppliers to view City's solicitations. Registered suppliers can then participate in City's sourcing events electronically. It allows registered suppliers to print solicitations and offer many tools to submit their quotes online.

The City strongly encourages its suppliers to do business on-line. The City will still continue to support non internet vendors as ever, but they are now at the risk of losing the benefits that the City has to offer to its on-line vendors.

This chapter contains the following topics:

**What is on-line business?**

**Why on-line?**

**What are the Pre-requisites to do on-line business with the City?**

**Where do I Begin?**

**How to access?**

### **What is on-line business?**

*What is on-line business?*

On-line business is the process of doing business through automated information system. Business-to-government (B2G) model allow businesses to bid on government RFPs in a reverse auction fashion through the internet.

### **Why on-line?**

*Why on-line?*

On-line business enables the City to communicate key procure-to-pay information with the suppliers effectively. Suppliers have real time access to information (such as purchase orders, receipts, invoices, solicitations etc). On-line process creates a virtual paper-free environment and reduces the entire procure-to-pay cycle time.

---

## **What are the pre-requisites to do on-line business with City?**

### *What are the pre-requisites to do on-line business with the City?*

- Suppliers must have a computer and internet connection to do online business with the City. (If you are reading this, you already fulfilled this pre-requisite).
- You must be logged on to the internet.
- Suppliers must have a valid e-mail account. (You can obtain free e-mail accounts through [www.yahoo.com](http://www.yahoo.com), [www.hotmail.com](http://www.hotmail.com), [www.gmail.com](http://www.gmail.com) etc.).
- You must have Adobe installed on your computer to open some of our documents. (Click [here](#) to download Adobe reader).
- You must turn the Pop-Blocker Off on your internet browser.

## **Where do I begin?**

### *Where do I begin?*

To view City's current solicitations, suppliers need not be registered with the City. For everything else, suppliers must register with the City's new purchasing application to do on-line business. Please follow this interactive reference document for registration details.

## **How to access?**

### *How to access?*

You can access the supplier registration page by clicking [here](#). Once registered, you can access the "iSupplier Portal" and Sourcing applications using your credentials (assigned username and password) by clicking [here](#). To view City's solicitation abstracts click [here](#). You will also find these links in How-To-Do-Business page on the City's web site.

## Supplier Registration Process

### Supplier Registration Process

As a supplier, your first step to do business with the City is to ensure that you are registered in the City's iSupplier Portal application. If you have not registered your organization already, please follow "New Supplier Registration Application" process.

To ensure a smooth processing of your application, please have your Tax ID and your current valid e-mail address handy. Without proper Tax Id and e-mail information, your application will not be processed.

## New Supplier Registration Application

### *New Supplier Registration Application*

Please click on "See It" for an interactive self-learning tutorial kit.

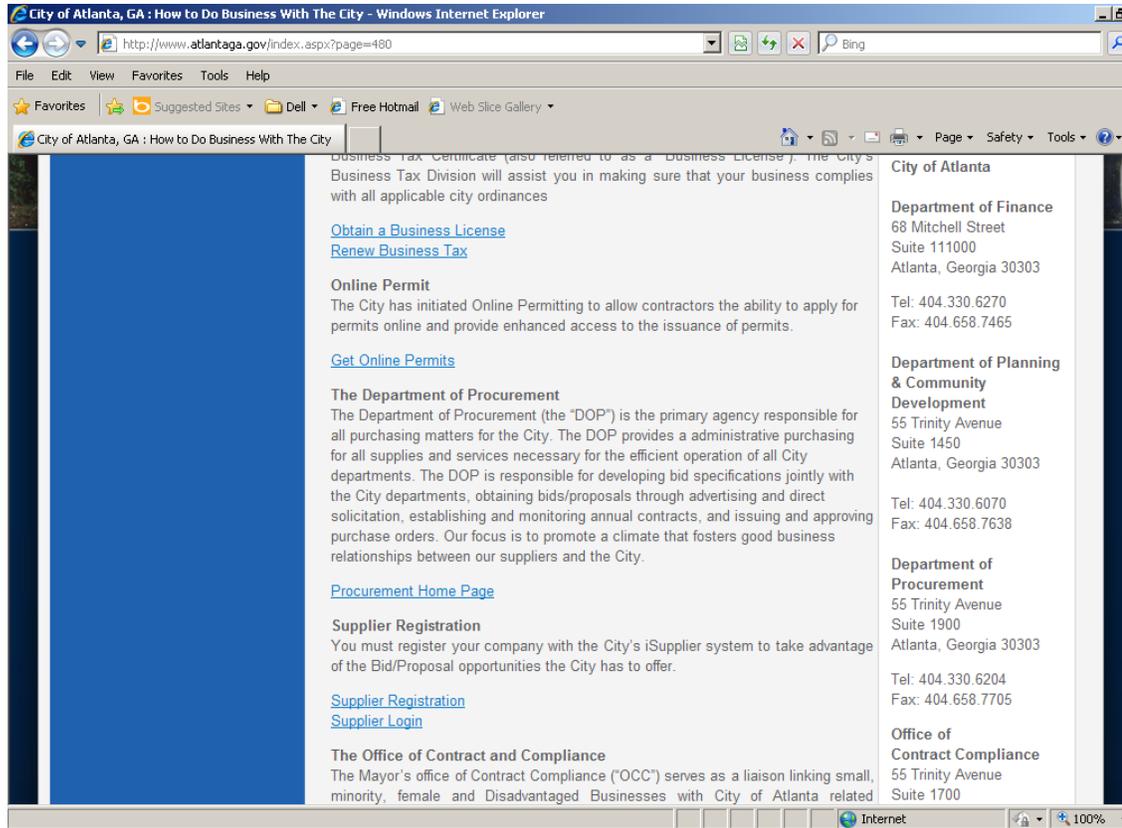
## Procedure

At the end of this exercise, you will be able to register your Organization with the City online.

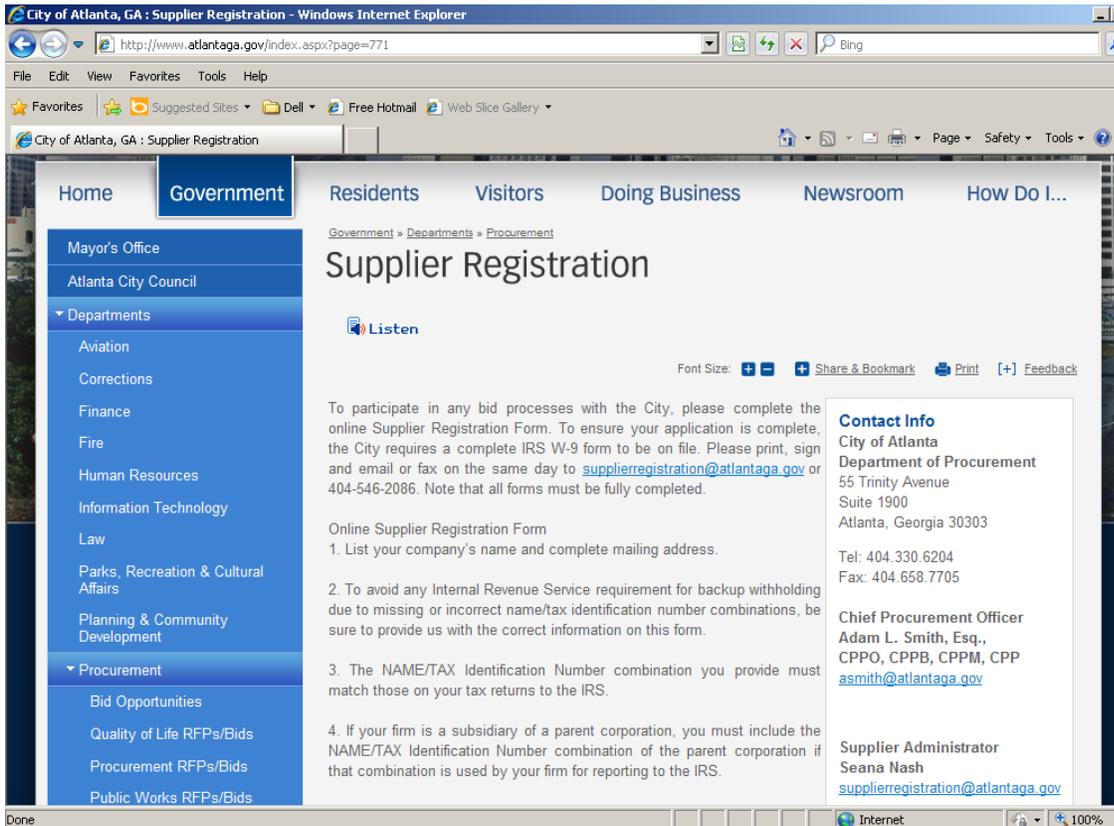
Step	Action
1.	Open Internet Explorer or a web browser of your choice.
2.	Click in the field. Type in www.atlantaga.gov on the address bar and click go.



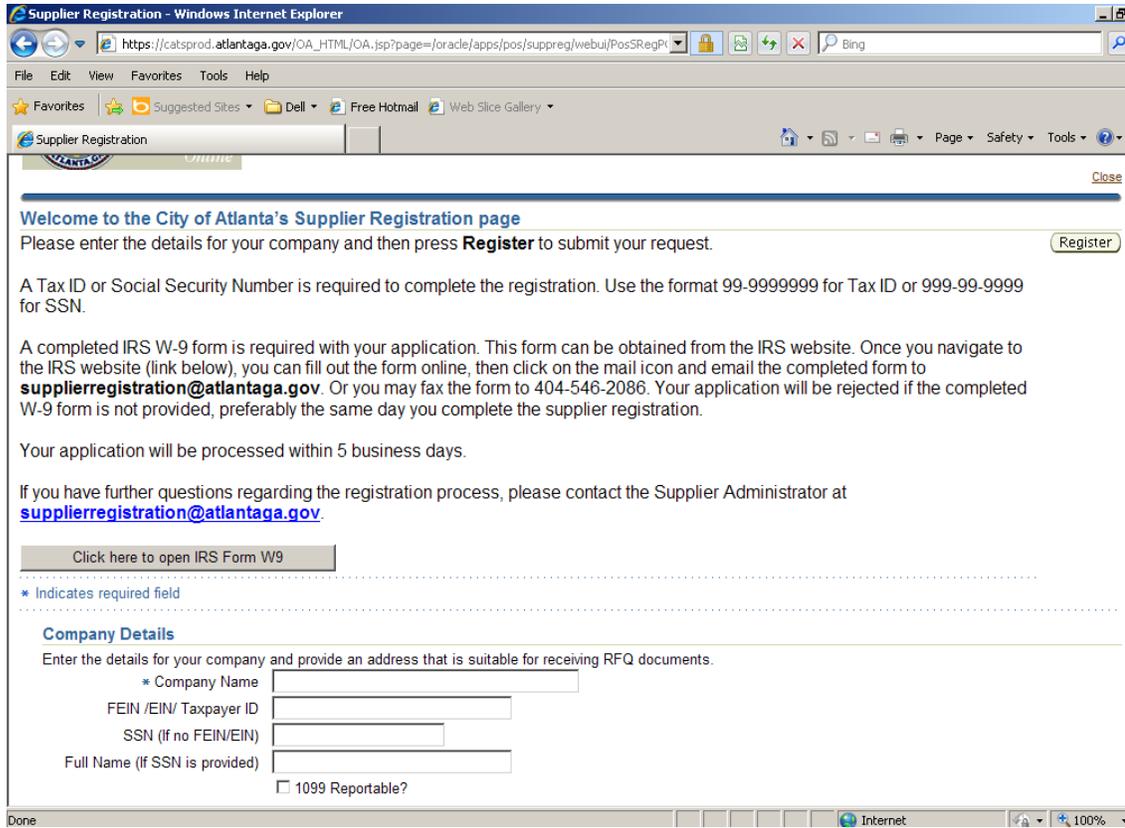
Step	Action
3.	Point to the <b>Doing Business</b> object.
4.	Point to the <b>How To Do Business With The City</b> object. Click on How To Do Business With The City



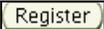
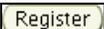
Step	Action
5.	Scroll down on the How to Do Business page
6.	Click on <b>Supplier Registration</b>

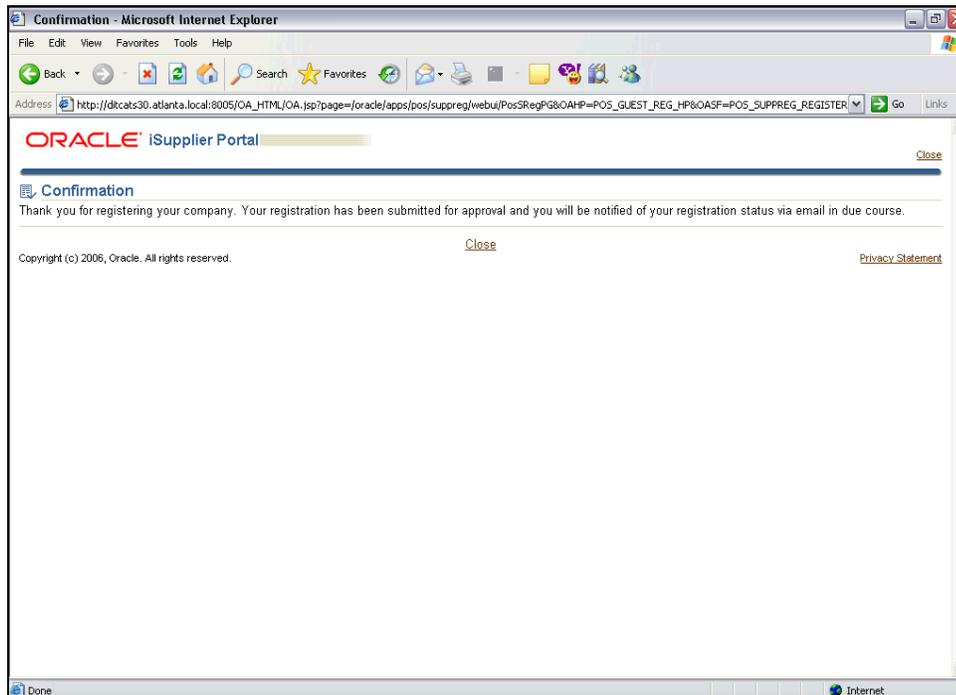


Step	Action
7.	Read all information on the Supplier Registration page
8.	Scroll down and Click on <b>Online Supplier Registration Form</b>

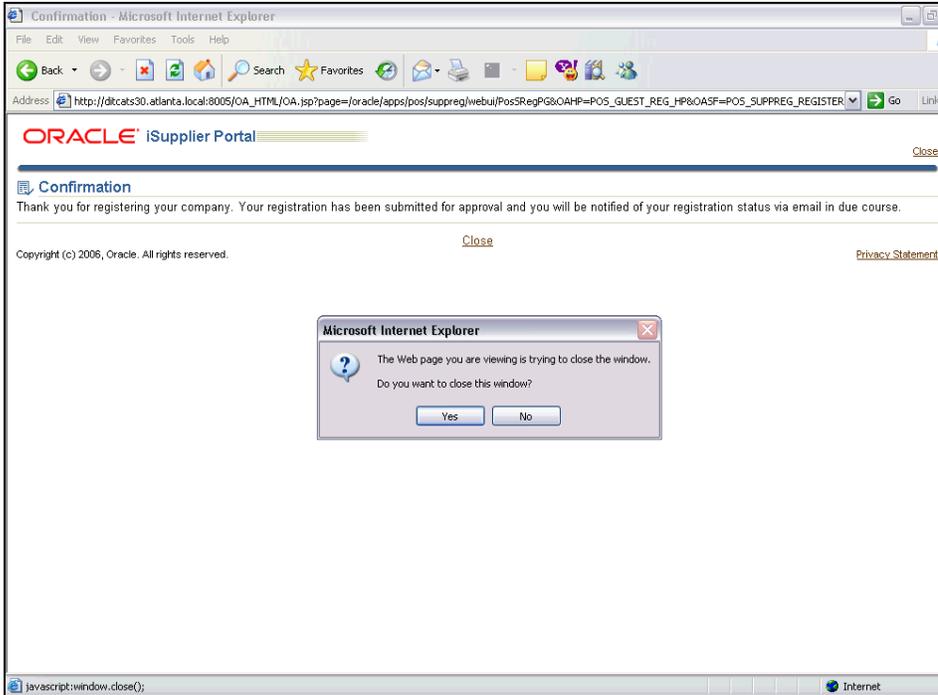


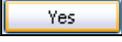
Step	Action
9.	Enter the desired information into the <b>Company Name</b> field. Enter " <b>YOUR COMPANY NAME GOES HERE</b> ".  Please read the instructions on the top of the page.
10.	Enter the desired information into the <b>FEIN /EIN/ Taxpayer ID</b> field. Enter " <b>99-9999999</b> ".  If you have a Tax ID #, enter it here. If you use your SSN (Social Security Number) for your purposes then you may enter that in the next field and leave the Tax ID field Blank.
11.	Click the <b>1099 Reportable?</b> option.  If you are a 1099 reportable vendor, please check the box. If you are not a 1099 reportable vendor, you may skip this. <input type="checkbox"/>
12.	Click in the <b>Address Name</b> field.  Give a suitable nickname for your address so that the City can easily recognize. <input type="text"/>

Step	Action
13.	Enter the desired information into the <b>Address Name</b> field. Enter " <b>PAY SITE</b> ".  In this example, we nicknamed our site as the PAY SITE.
14.	Enter the desired information into the <b>Address</b> field. Enter " <b>123 YOUR STREET NAME</b> ".  Enter your Address here.
15.	Enter the desired information into the <b>City/Town/Locality</b> field. Enter " <b>YOUR CITY</b> ".
16.	Enter the desired information into the <b>State/Region</b> field. Enter " <b>YOUR STATE</b> ".
17.	Enter the desired information into the <b>Postal Code</b> field. Enter " <b>YOUR ZIP CODE</b> ".
18.	Enter the desired information into the <b>Note to Approver</b> field. Enter " <b>ADD ANY OTHER INFORMATION THAT IS RELEVANT TO YOUR REGISTRATION APPLICATION</b> ".
19.	Enter the desired information into the <b>Email Address</b> field. Enter " <b>YOUR EMAIL ADDRESS (Format your e-mailid@emailprovider.com)</b> ".  This person also becomes your authorized user for this application.  Please ensure that the Email is valid and working as the application will start communicating with you through this email.
20.	Enter the desired information into the <b>First Name</b> field. Enter " <b>YOUR FIRST NAME</b> ".  Enter the first name of the authorized user.
21.	Enter the desired information into the <b>Last Name</b> field. Enter " <b>YOUR LAST NAME</b> ".  Enter the last name of the authorized user.
22.	Enter the desired information into the <b>Phone Number</b> field. Enter " <b>(555) 555 5555</b> ".  Enter the Phone number of the authorized user.
23.	Point to the <b>Register</b> object.  Review your application for accuracy before clicking the Register Button 
24.	Click the <b>Register</b> button.  Click the Register button to submit your application. 



Step	Action
25.	<p>Point to the <b>Close</b> object.</p> <p>Please read the confirmation message and allow 2-3 business days for the City to process your application.</p> <p>Upon processing your application, you will receive an email from the City on the Email Id provided during the registration process.</p> <p><a href="#">Close</a></p>
26.	<p>Click the <b>Close</b> link.</p> <p><a href="#">Close</a></p>
27.	<p>Please complete the <b>W-9 form</b></p> <p>Note: You can Click on the W-9 link on the Supplier Registration page</p>
28.	<p>W-9 should be submitted on the same day you register your online application by email to <a href="mailto:isupplierregistration@atlantaga.gov">isupplierregistration@atlantaga.gov</a> or fax to 404-546-2086.</p>



Step	Action
29.	Point to the <b>Yes</b> object. 
30.	Click the <b>Yes</b> button.  <i>or</i> Press <b>[Alt+Y]</b> .
31.	<b>End of Procedure.</b>

## Approval Notification

### *Approval Notification*

Once approved, the suppliers will receive the approval notification. The approval notification includes their user name and password to login to City's "iSupplier Portal" application.

The password is randomly generated by the application and therefore, the system will force you to change it upon your first successful login using the temporary password.

This completes the first phase of the registration process.

***This approval notification does not guarantee your Company's inclusion on City's solicitation's invitation list.***

In order for the City to be able to include your company on the solicitation's invitation list, you need to specify the "Products and Services" that your company provides.

It is also necessary that you furnish your minority information to the City.

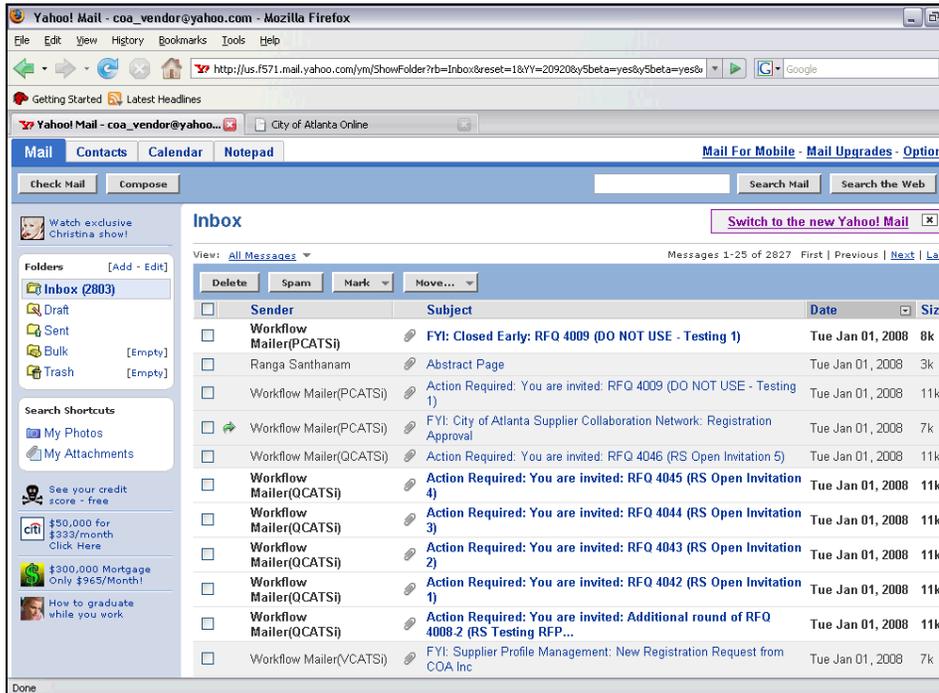
Upon receiving this approval e-mail notification, you may login to our application and furnish your minority and "Products and Services" information. City will then review the provided information and upon approval, the second and final phase of your registration process will be completed.

The first phase of approval will give you the ability to logon to our application and furnish your Address, Contacts, Minority (Business Classifications), "Products and Services" information. At this stage of the approval process, you will not be able to monitor purchase orders or submit invoices/quotes online etc.

After a successful phase two registration, you will now be given full access to our application. Full access includes, ability to monitor Purchase Orders, Receipts, Invoices, Payments, and Quotes.

## Procedure

Upon Approval, you will receive a notification as shown in the slide.



Step	Action
1.	<p>Click the object.</p> <p>Please ensure that the Email from the City of Atlanta is not delivered to the Spam folder.</p> <p>Please look for an email from the City titled "City of Atlanta Supplier Collaboration network"</p>
2.	<p>Release the mouse button.</p> <p>This is a sample approval email.</p>
3.	<b>End of Procedure.</b>

## **Manage Supplier Profile Information**

### *Manage Supplier Profile Information*

Use our "iSupplier Portal" application to communicate changes to your company's profile. Any changes or additions to your addresses and contacts, you can logon to our application and make the necessary modifications yourself.

Keeping your "Products and Services" up-to-date is key, as the City relies on this information while preparing its invitation list for a sourcing event. Not keeping your "Products and Services" up-to-date may prevent you from getting invited for potential solicitations.

We now begin the Phase-II of the registration Process.

At the end of this registration process, as a supplier, you will have access to our more advanced features of the application.

## **Login to iSupplier**

### *Login to iSupplier Portal*

Please click on the "See-It" to activate the interactive tutorial.

Congratulations on becoming an approved vendor with the City. Please note your password from your approval email notification and enter it when needed.

After a successful login, you will now begin the Phase - II registration process.

## **Procedure**

At the end of this exercise, you will learn to login to City's Procurement applications.

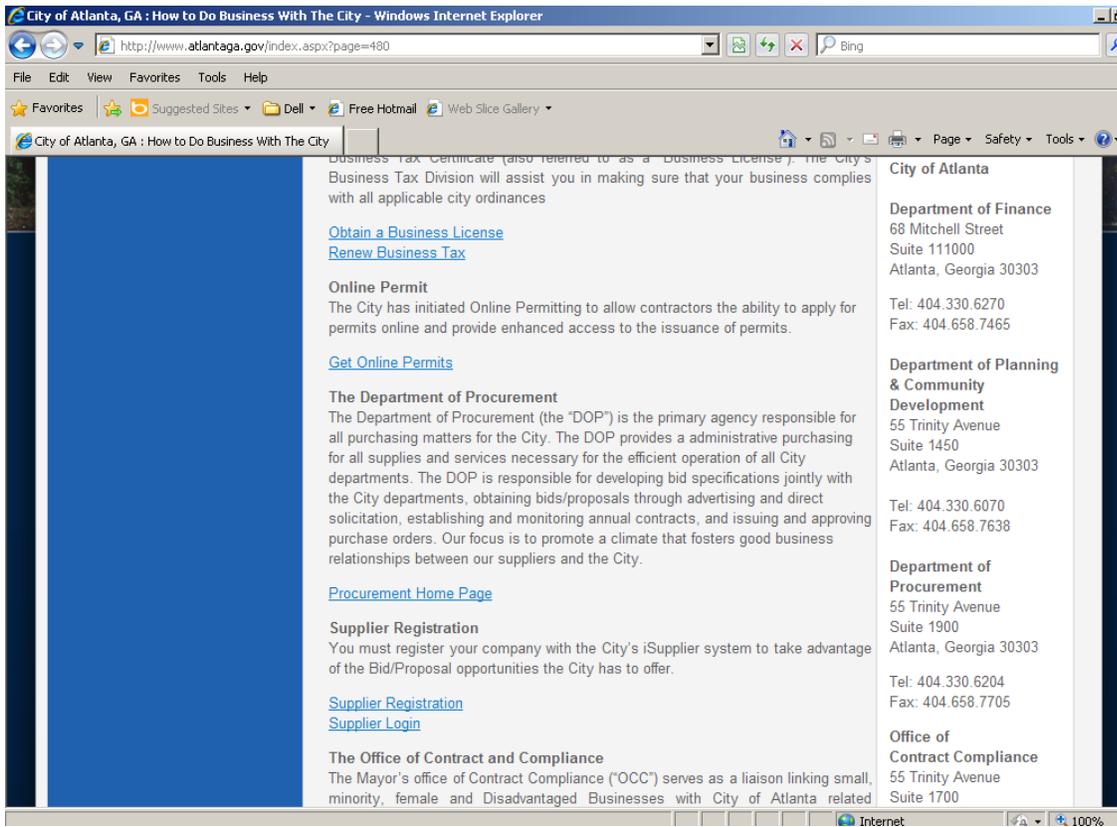
We are now beginning the Phase - II registration process.



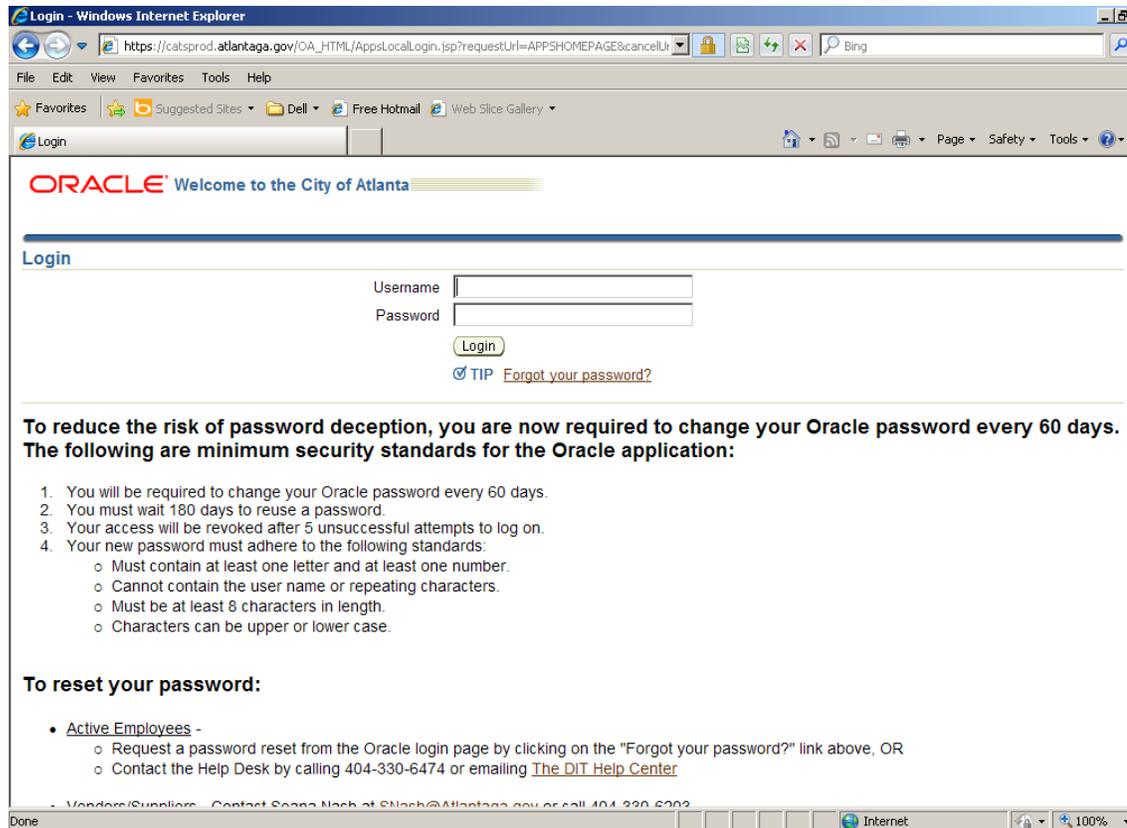
Step	Action
1.	<p>Go to the City's website.</p> <p>City's website is: <a href="http://www.atlantaga.gov">www.atlantaga.gov</a></p> <p>Type this on the address field of the browser and Click the Go Button.</p>



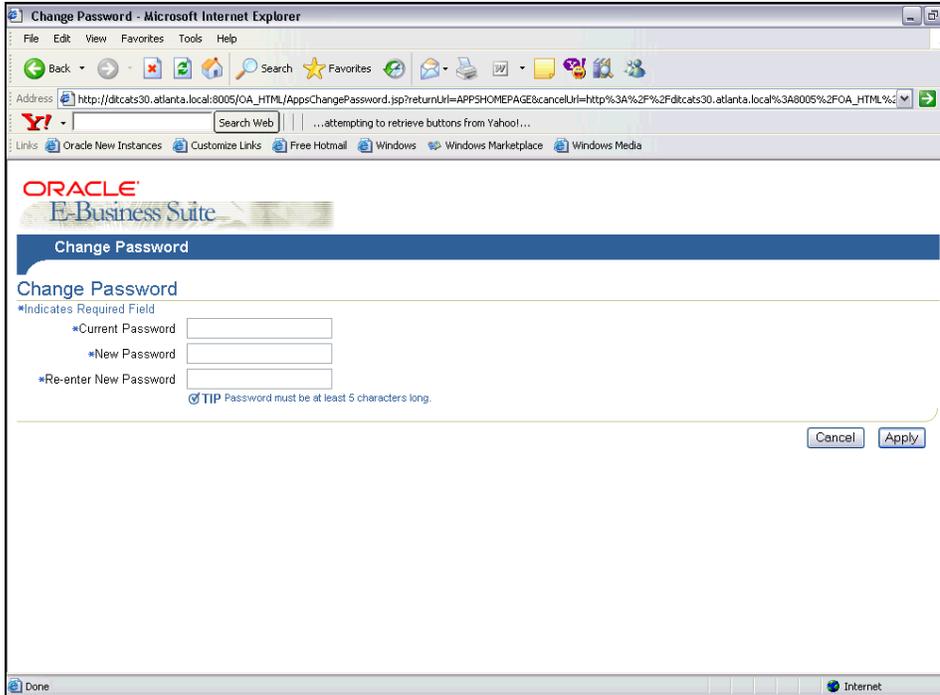
Step	Action
2.	Point to the <b>Doing Business</b> object.
3.	Click the <b>How To Do Business With The City</b> object. <div style="border: 1px solid black; padding: 2px; width: fit-content; margin-top: 5px;">How To Do Business With The City</div>



Step	Action
4.	Scroll down on the Supplier Registration page
5.	Click on <b>Supplier Login</b>



Step	Action
6.	<p>Enter the desired information into the <b>Username</b> field. Enter "<b>YOURMAILID@EMAILPROVIDER.COM</b>".</p> <p>Enter your email id on the User Name and your password.</p> <p>NOTE: You would have received your password along with the Registration Approval email.</p> <p>NOTE: Please check the FAQ section for lost passwords and password reset procedures.</p> <p>You can bookmark this page for easier access.</p>
7.	Enter the desired information into the <b>Password</b> field. Enter " <b>welcome</b> ".
8.	Enter the desired information into the <b>Password</b> field. Enter " <b>welcome</b> ".
9.	<p>Point to the <b>Login</b> object.</p> <p></p>



Step	Action
10.	<p>Enter the desired information into the <b>Current Password</b> field. Enter "<b>welcome</b>".</p> <p>For the first time only, the application will ask you to reset your password for security reasons.</p> <p>You are required to enter your current password (the one on your email) and then enter your new password before clicking the apply button.</p>
11.	Enter the desired information into the <b>New Password</b> field. Enter " <b>welcome1</b> ".
12.	Enter the desired information into the <b>Re-enter New Password</b> field. Enter " <b>welcome1</b> ".
13.	<p>Click the <b>Apply</b> button.</p> 
14.	<p>Congratulations.</p> <p>You are now successfully logged into the application and are now ready to begin your Phase - II registration process.</p> <p><b>End of Procedure.</b></p>

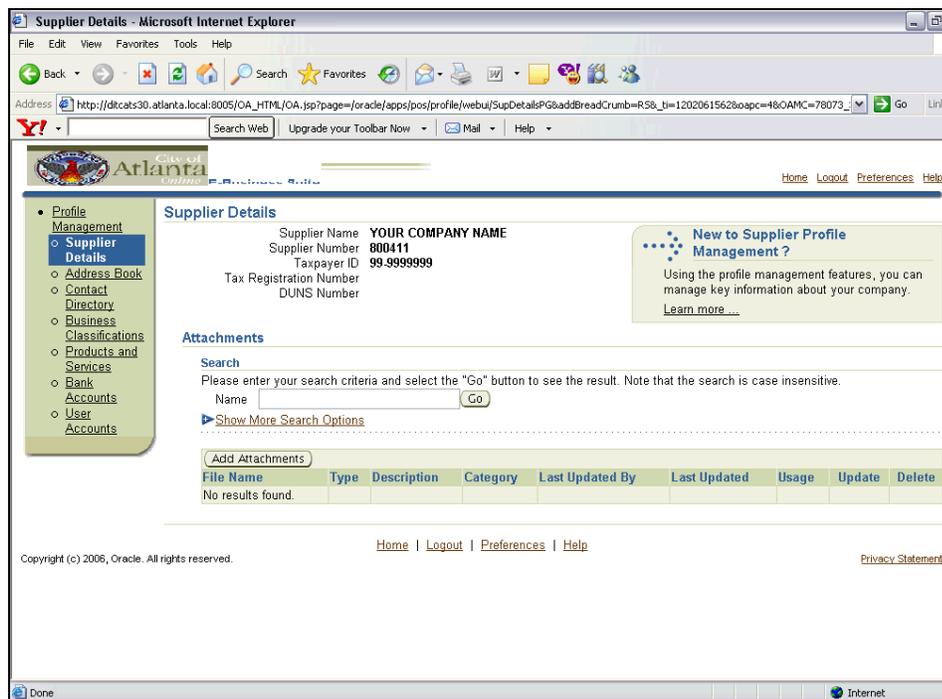
## Add a new site

### Add a new address site

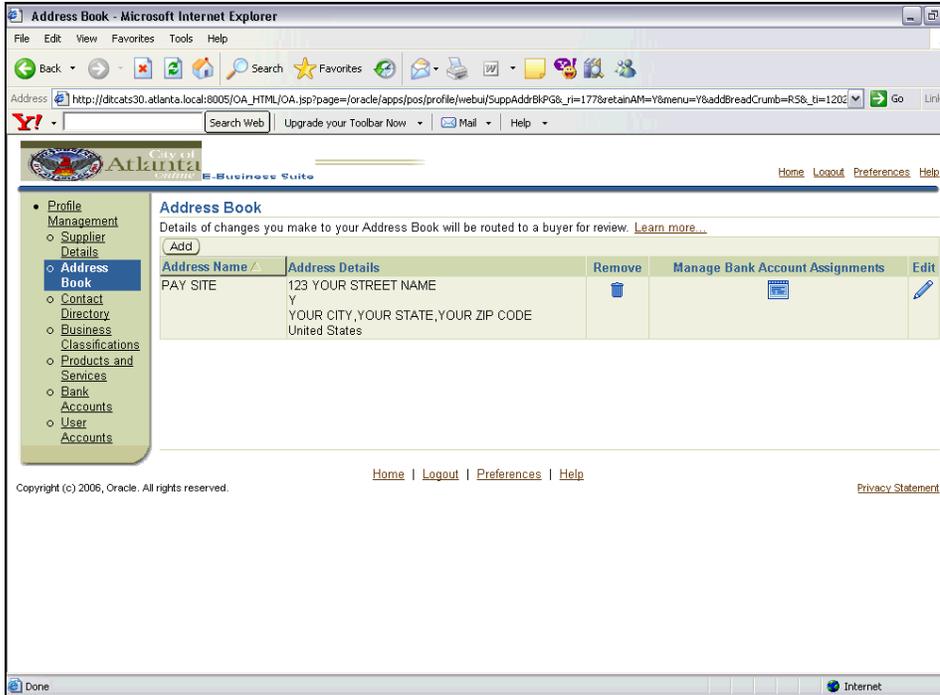
If you expand your business and open a new branch or relocate, you may be able to use this feature to let the City know of your new Site details.

## Procedure

At the end of this exercise, you will be able to register a new Site of your Organization with the City.



Step	Action
1.	Click the <b>Address Book</b> link.  <u>Address Book</u>



Step	Action
2.	Click the <b>Add</b> button. 

The screenshot shows a web browser window titled "Add Address - Microsoft Internet Explorer". The address bar shows a URL from the City of Atlanta's iSupplier system. The page content includes the "City of Atlanta Business Suite" logo and navigation links like "Home", "Logout", "Preferences", and "Help". The main form is titled "Add Address" and contains several input fields:

- Address Name:** A text field with a note: "Provide a suitable nickname for the address."
- Country:** A dropdown menu currently set to "United States".
- Address:** Three stacked text input fields.
- City/Town/Locality:** A text input field.
- County:** A text input field.
- State/Region:** A text input field.
- Province:** A text input field.
- Postal Code:** A text input field.
- Note:** A large text area with a note: "Include any additional details about the address such as the type of the address".
- Phone Area Code:** A text input field.
- Phone Number:** A text input field.
- Fax Area Code:** A text input field.
- Fax Number:** A text input field.
- Email Address:** A text input field.

Buttons for "Cancel" and "Apply" are located at the top right and bottom right of the form area. The browser's status bar at the bottom shows "Done" and "Internet".

Step	Action
3.	Enter the desired information into the <b>Address Name</b> field. Enter <b>"PURCHASING SITE"</b> .  In this example, we chose "PURCHASING SITE" as the nick name.
4.	Enter the desired information into the <b>Address</b> field. Enter <b>"NAME"</b> .
5.	Enter the desired information into the <b>Address</b> field. Enter <b>"567 YOUR NEW ADDRESS STREET NAME"</b> .
6.	Enter the desired information into the <b>City/Town/Locality</b> field. Enter <b>"YOUR NEW ADDRESS CITY"</b> .
7.	Enter the desired information into the <b>State/Region</b> field. Enter <b>"YOUR NEW ADDRESS STATE"</b> .

The screenshot shows a web browser window titled "Add Address - Microsoft Internet Explorer". The address bar shows a URL from the City of Atlanta's E-Business Suite. The page content includes a header with the City of Atlanta logo and "E-Business Suite" text. Below the header is a navigation bar with "Home", "Logout", "Preferences", and "Help" links. The main content area is titled "Address Book > Add Address". A note indicates that asterisks (\*) denote required fields. The form contains several input fields: "Address Name" (filled with "PURCHASING SITE"), "Country" (dropdown menu showing "United States"), "Address" (filled with "567 YOUR NEW ADDRESS STREET NAME"), "City/Town/Locality" (filled with "YOUR NEW ADDRESS CITY"), "State/Region" (filled with "YOUR NEW ADDRESS STATE"), "Postal Code", "Phone Area Code", "Phone Number", "Fax Area Code", "Fax Number", and "Email Address". There are "Cancel" and "Apply" buttons at the top right and bottom right of the form area. At the bottom of the page, there is a copyright notice for Oracle and a "Privacy Statement" link.

Step	Action
8.	Enter the desired information into the <b>Postal Code</b> field. Enter " <b>YOUR NEW ADDRESS ZIP CODP</b> ".
9.	Enter the desired information into the <b>Phone Area Code</b> field. Enter " <b>555</b> ".
10.	Enter the desired information into the <b>Phone Number</b> field. Enter " <b>555 5556</b> ".
11.	Enter the desired information into the <b>Fax Area Code</b> field. Enter " <b>555</b> ".
12.	Enter the desired information into the <b>Fax Number</b> field. Enter " <b>555 5557</b> ".
13.	Click the <b>Apply</b> button.  Before clicking the Apply Button, please review your information. 
14.	Congratulations, you just learnt to add a new site. <b>End of Procedure.</b>

## Modify Existing Site

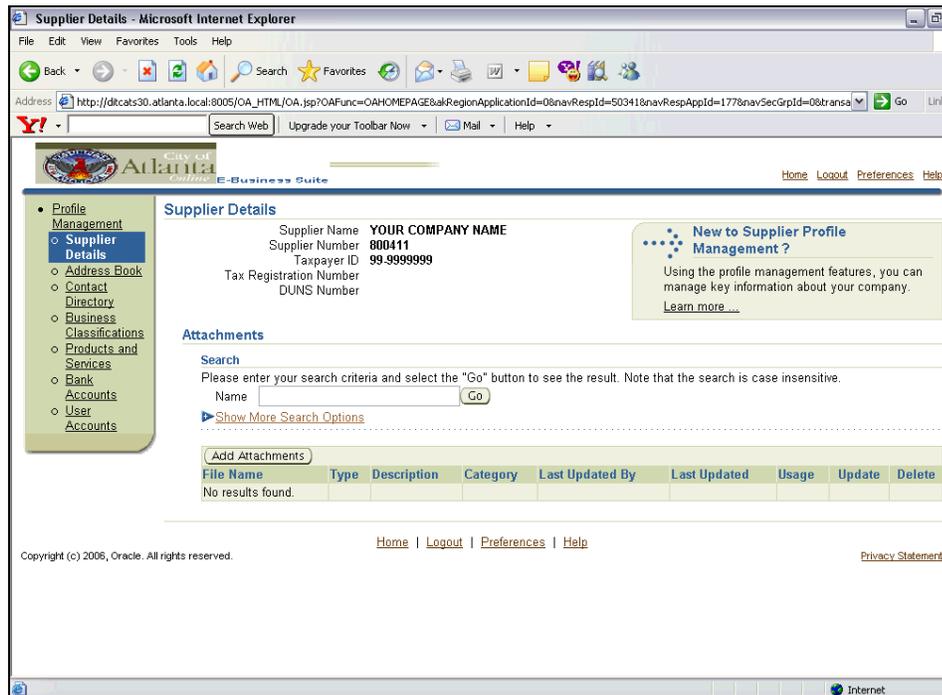
### Modify Existing Site

If you have a new Phone/Fax numbers or relocate or make any changes to your site that may affect your business with the City, please sure to use this option to update your site details.

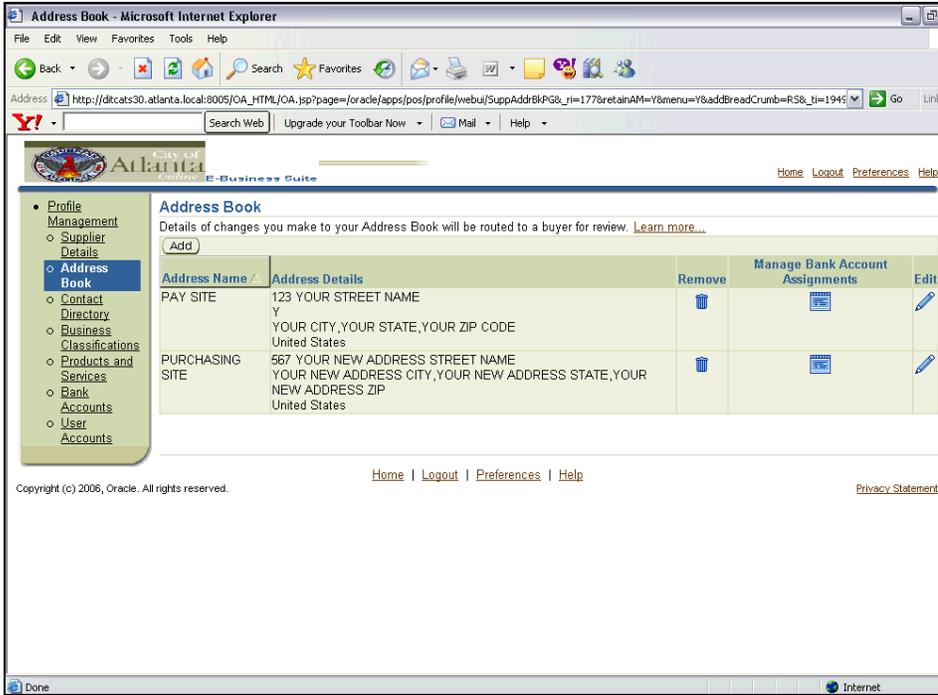
## Procedure

Let us learn to modify an existing address.

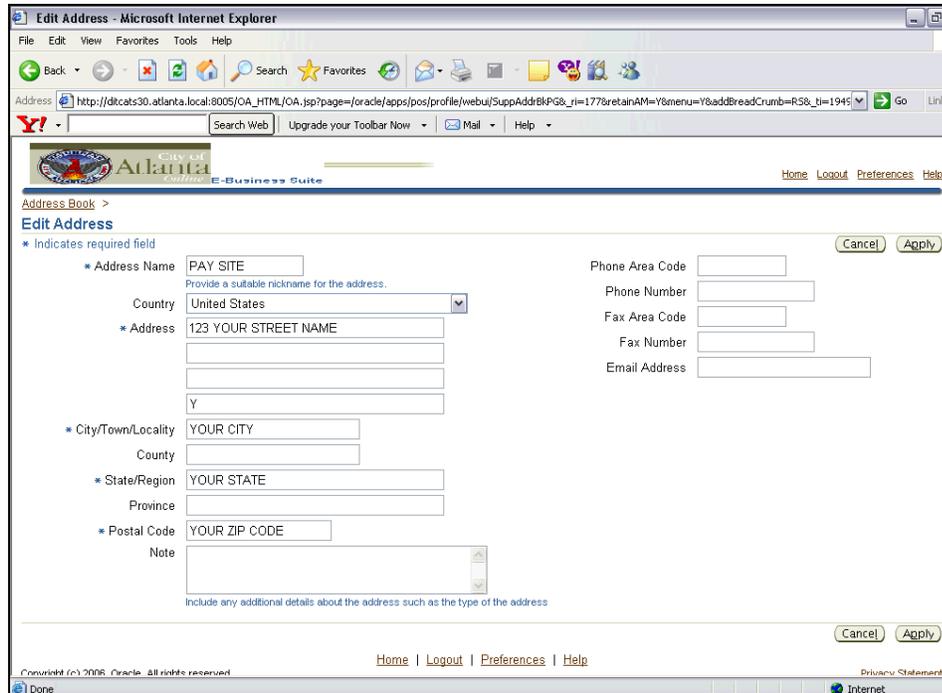
In this example, we are going to provide a phone number and a fax number to an existing address.



Step	Action
1.	Click the <b>Address Book</b> link. <a href="#">Address Book</a>



Step	Action
2.	Click the <b>Edit</b> button. 



Step	Action
3.	Enter the desired information into the <b>Note</b> field. Enter " <b>New Phone Number and Fax number added to this site.</b> ".
4.	Enter the desired information into the <b>Phone Area Code</b> field. Enter " <b>555</b> ".
5.	Enter the desired information into the <b>Phone Number</b> field. Enter " <b>555 5558</b> ".
6.	Enter the desired information into the <b>Fax Area Code</b> field. Enter " <b>555</b> ".
7.	Enter the desired information into the <b>Fax Number</b> field. Enter " <b>555 5559</b> ".
8.	Click the <b>Apply</b> button.  Please review the information before clicking the Apply button. 
9.	Congratulation, you just updated your site information. <b>End of Procedure.</b>

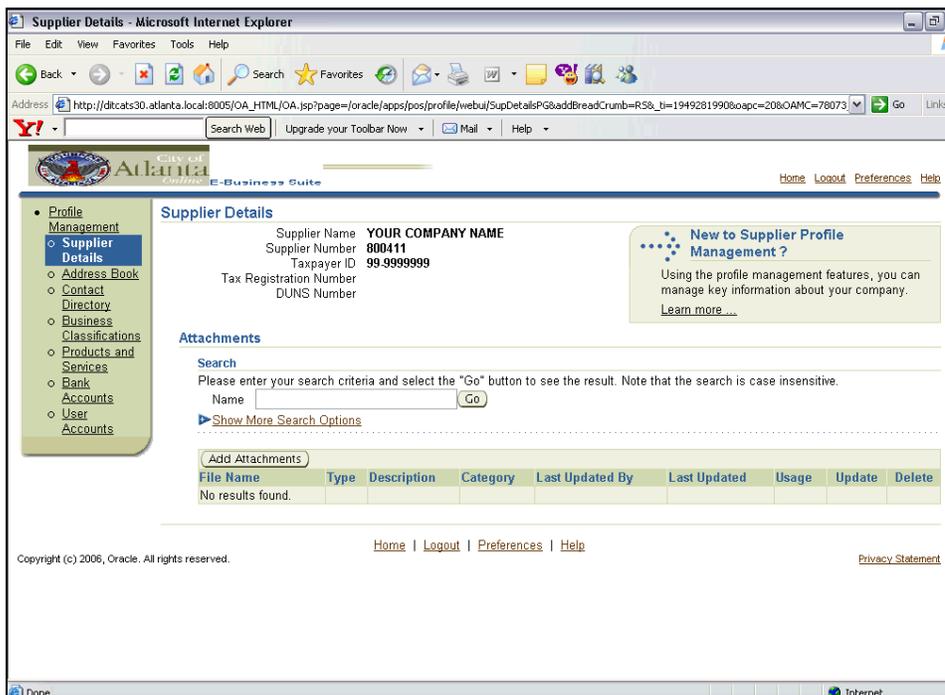
## Delete a site

### Delete Existing Site

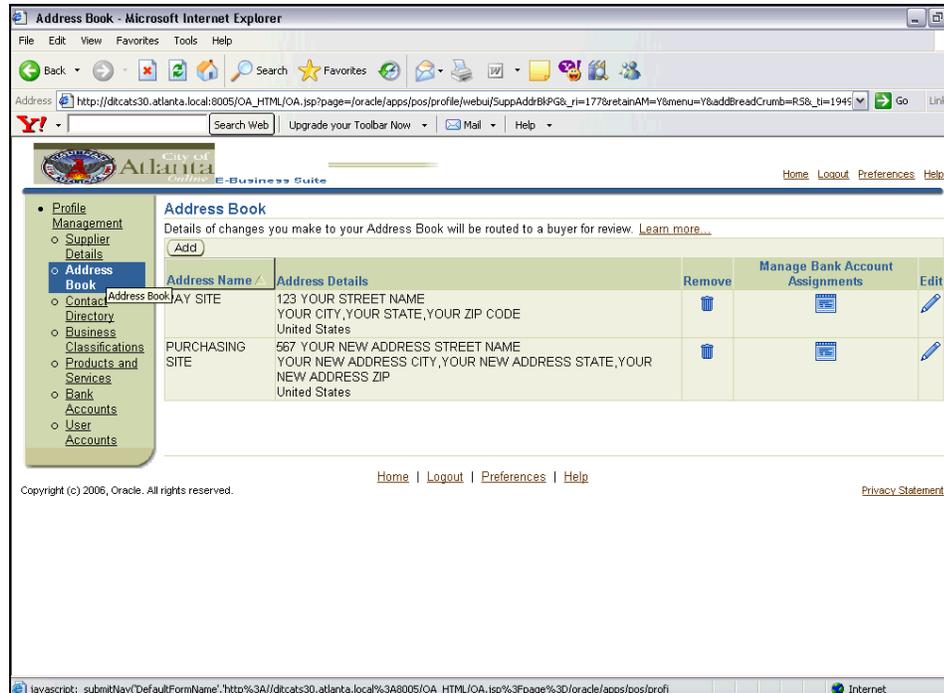
If you are no longer on a particular site, you may choose to remove the site from your profile. This is particularly important as you do not want some important communications to be sent to a site that does not exist anymore.

## Procedure

Let us learn to remove a site.



Step	Action
1.	Click the <b>Address Book</b> link. <a href="#">Address Book</a>



Step	Action
2.	Click the <b>Remove</b> button. 
3.	<b>End of Procedure.</b>

## Add a new contact

### Add new contact

Contacts are different from the authorized users. Authorized users are the employees of your organization who have access to this application, but are not necessarily the ones who are working with the City on a particular PO or an Invoice.

You may define those contacts heres.

## Procedure

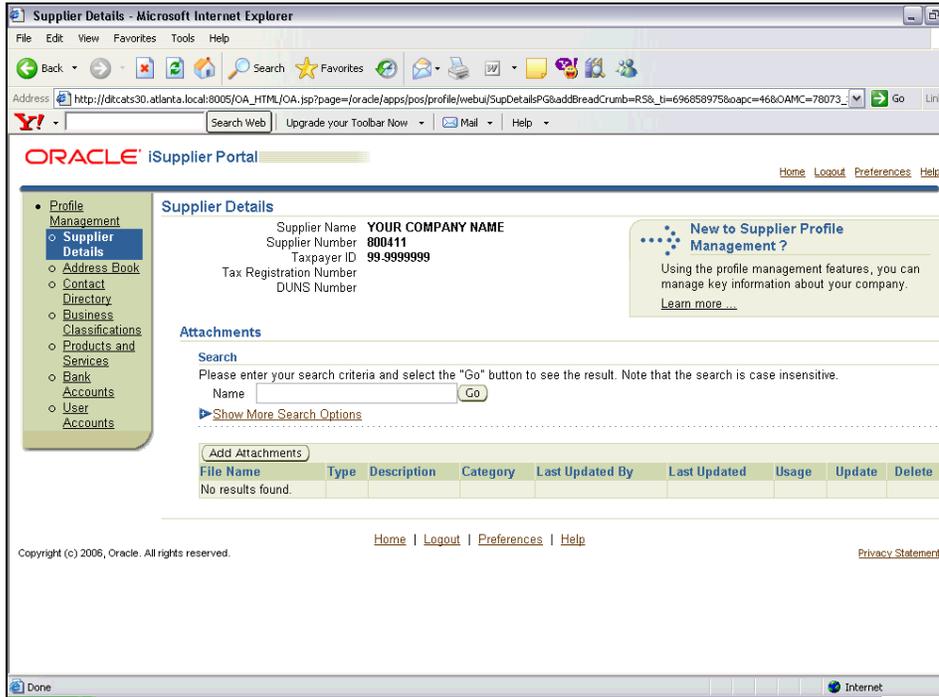
Let us learn to add a new contact.

Contacts are different from the authorized users.

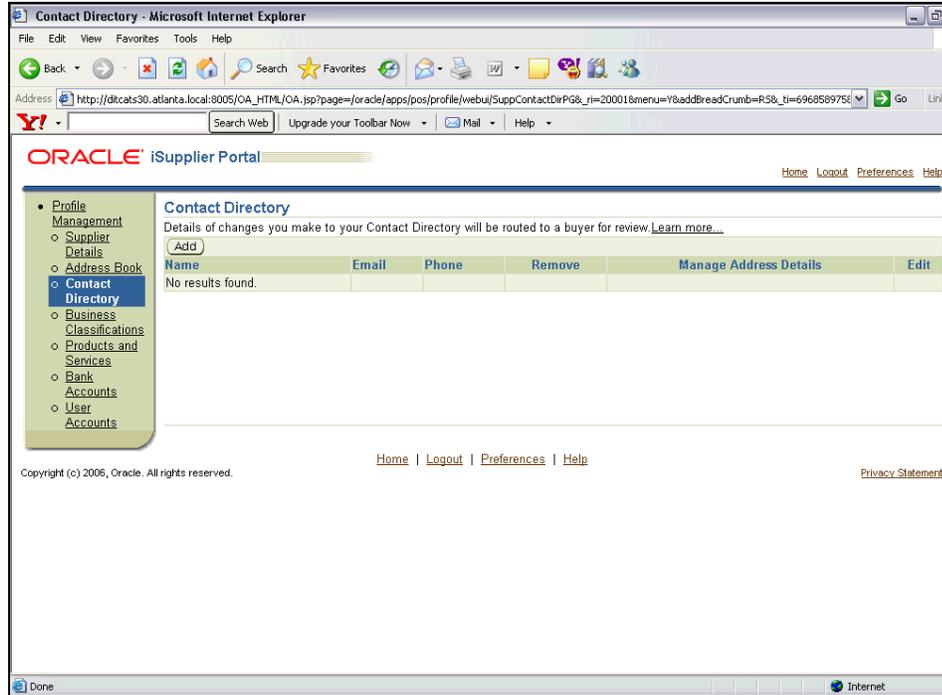
Authorized users are the employees of your organization who can login to this application.

But you may have a different point of contact for your Sales Order and Receivables.

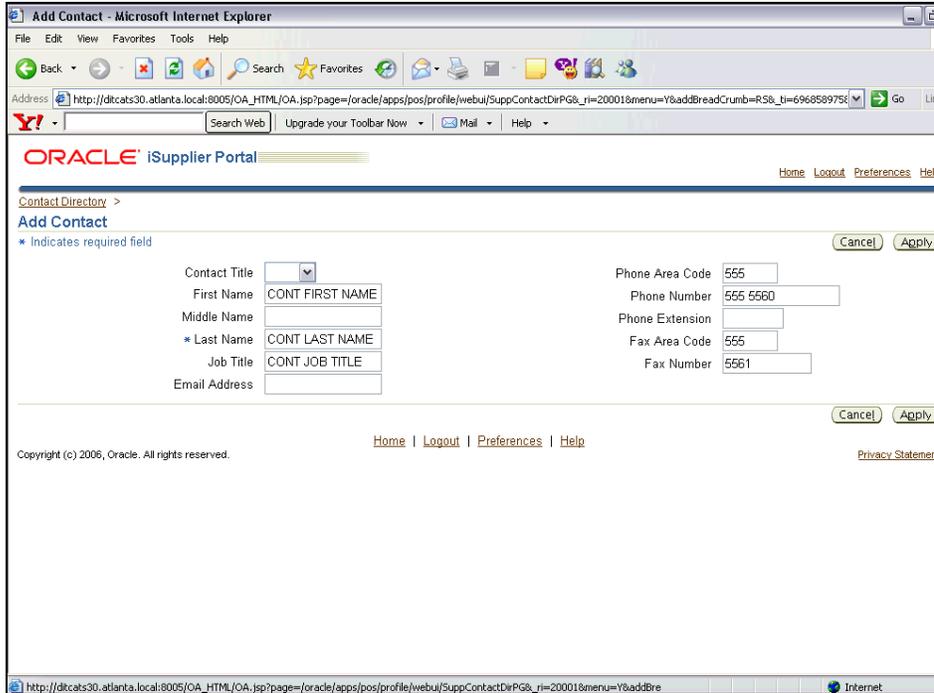
You may define those contacts here.



Step	Action
1.	Click the <b>Contact Directory</b> link. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Contact Directory</div>



Step	Action
2.	Click the <b>Add</b> button. 
3.	Enter the desired information into the <b>First Name</b> field. Enter " <b>CONT FIRST NAME</b> ".
4.	Enter the desired information into the <b>Last Name</b> field. Enter " <b>CONT LAST NAME</b> ".
5.	Enter the desired information into the <b>Job Title</b> field. Enter " <b>CONT JOB TITLE</b> ".
6.	Enter the desired information into the <b>Phone Area Code</b> field. Enter " <b>555</b> ".
7.	Enter the desired information into the <b>Phone Number</b> field. Enter " <b>555 5560</b> ".
8.	Enter the desired information into the <b>Fax Area Code</b> field. Enter " <b>555</b> ".
9.	Enter the desired information into the <b>Fax Number</b> field. Enter " <b>5561</b> ".



Step	Action
10.	Click the <b>Apply</b> button. 
11.	<b>End of Procedure.</b>

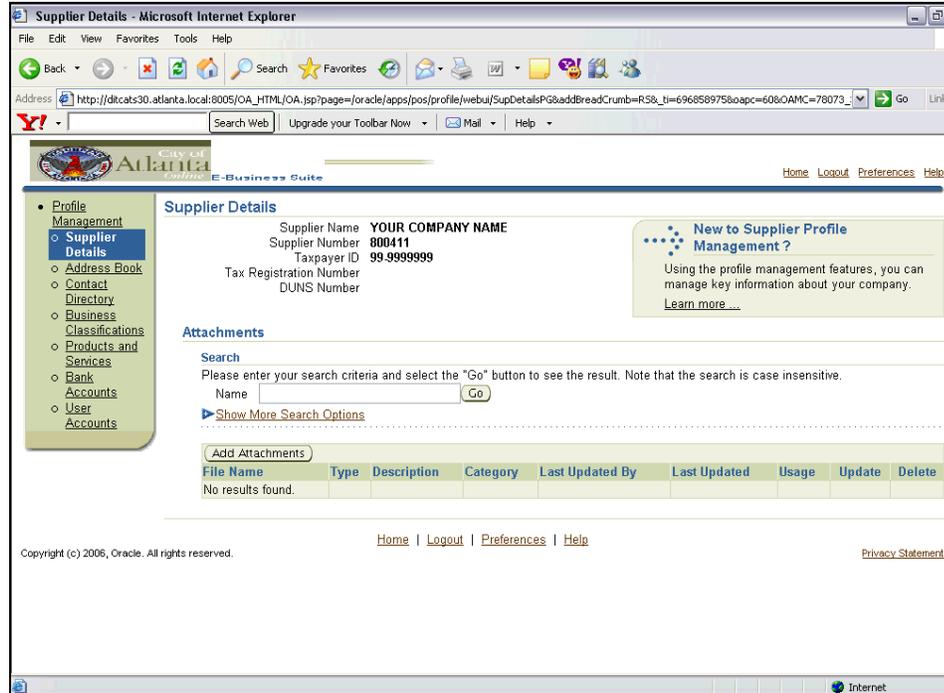
## Modify existing contact

### *Modify existing contact*

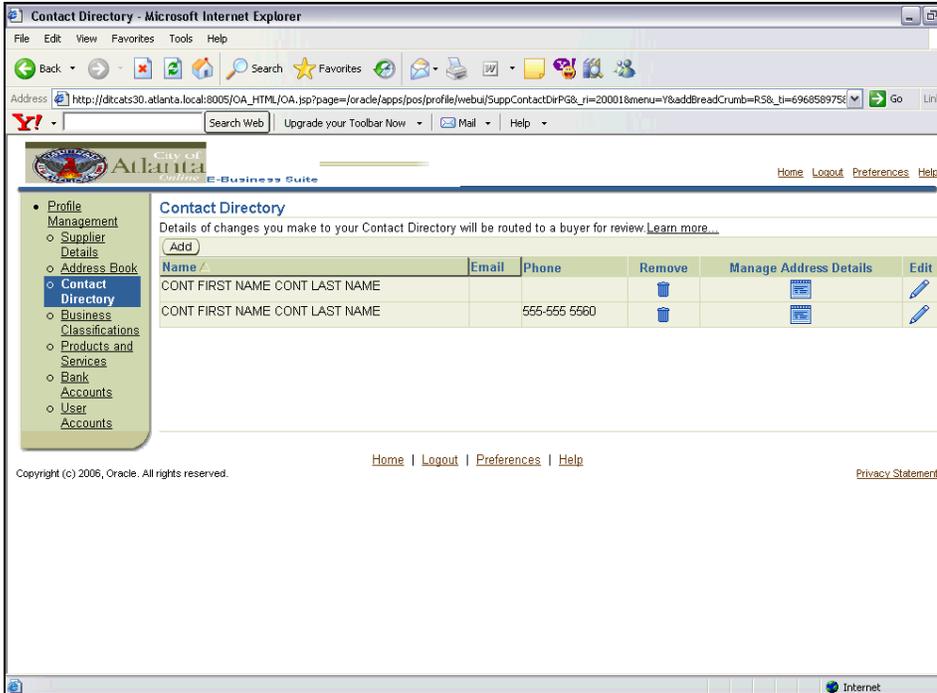
If any of your contact's phone or fax number changes, you may want to let the City know about the changes. You can also use this feature to indicate the changes to your email address, job title etc.

## Procedure

Let us learn to modify an existing contact. We are going to provide a Phone Number and a Fax Number to an existing Contact.



Step	Action
1.	Click the <b>Contact Directory</b> link. 



Step	Action
2.	Click the <b>Edit</b> button. 
3.	Enter the desired information into the <b>Phone Area Code</b> field. Enter " <b>555</b> ".
4.	Enter the desired information into the <b>Phone Number</b> field. Enter " <b>555 5570</b> ".
5.	Enter the desired information into the <b>Fax Area Code</b> field. Enter " <b>555</b> ".
6.	Enter the desired information into the <b>Fax Number</b> field. Enter " <b>555 5571</b> ".
7.	Click the <b>Apply</b> button. 
8.	<b>End of Procedure.</b>

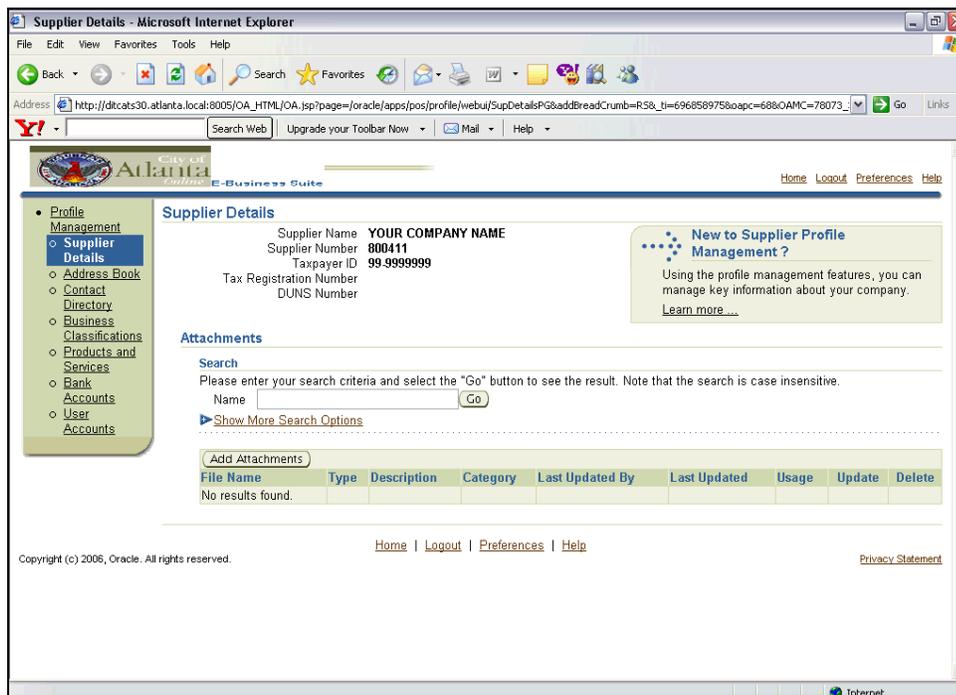
## Delete a contact

### Delete a contact

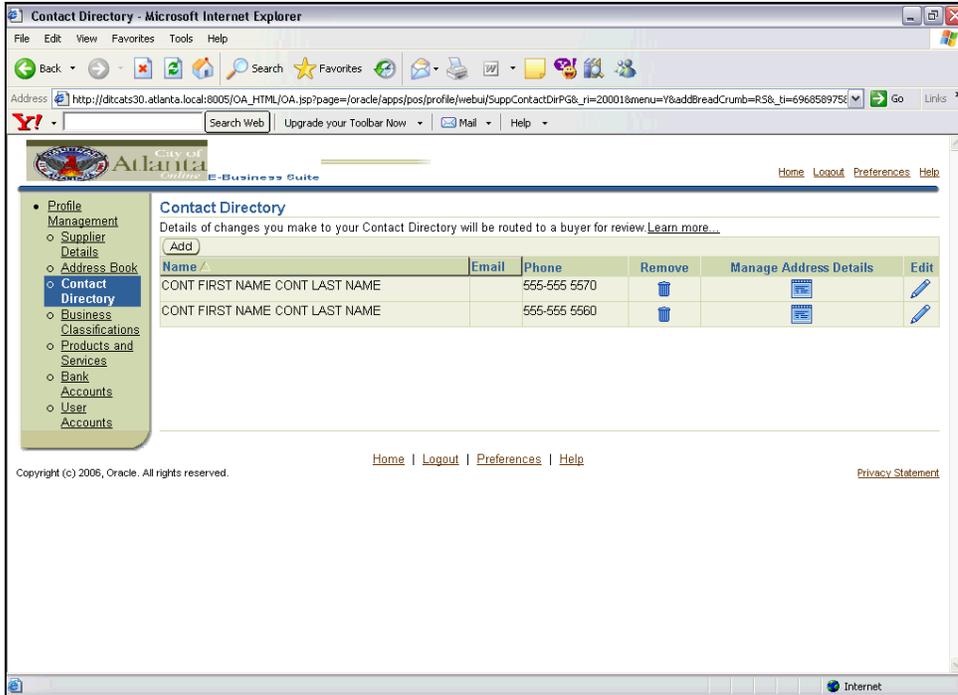
If any of the defined contacts no longer work with your organization, you may want to let the City know about it as you do not want the Contact to be in touch with the City representing your organization when they no longer work for you.

## Procedure

Let us learn to remove a contact.



Step	Action
1.	Click the <b>Contact Directory</b> link.



Step	Action
2.	Click the <b>Remove</b> button. 
3.	<b>End of Procedure.</b>

## Maintain Supplier Minority Information

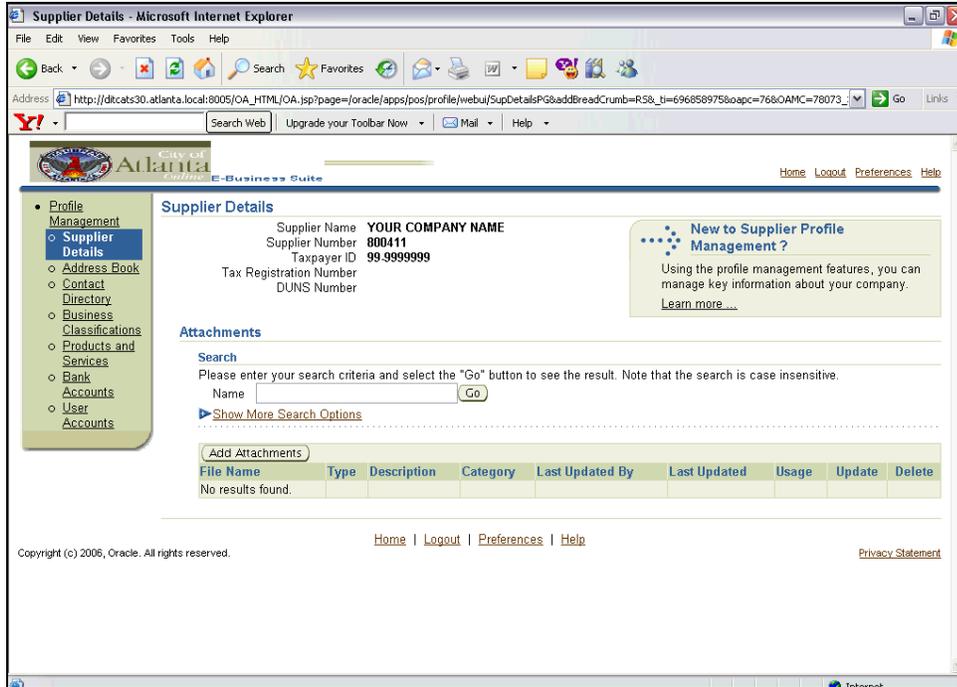
### *Maintain Supplier Minority Information*

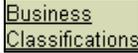
City of Atlanta is an Equal Opportunity provider. If you are a minority organization, you are required to submit your minority information to the City. You may use this feature to indicate the minority information. Please contact the Office of Contract Compliance for more details.

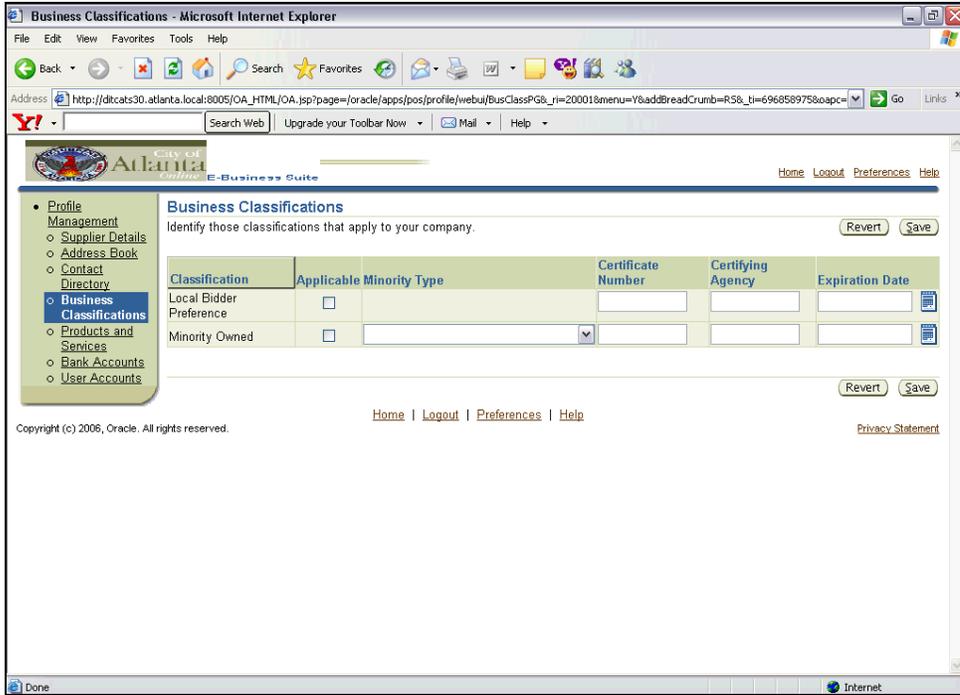
## Procedure

Let us learn to specify your minority information.

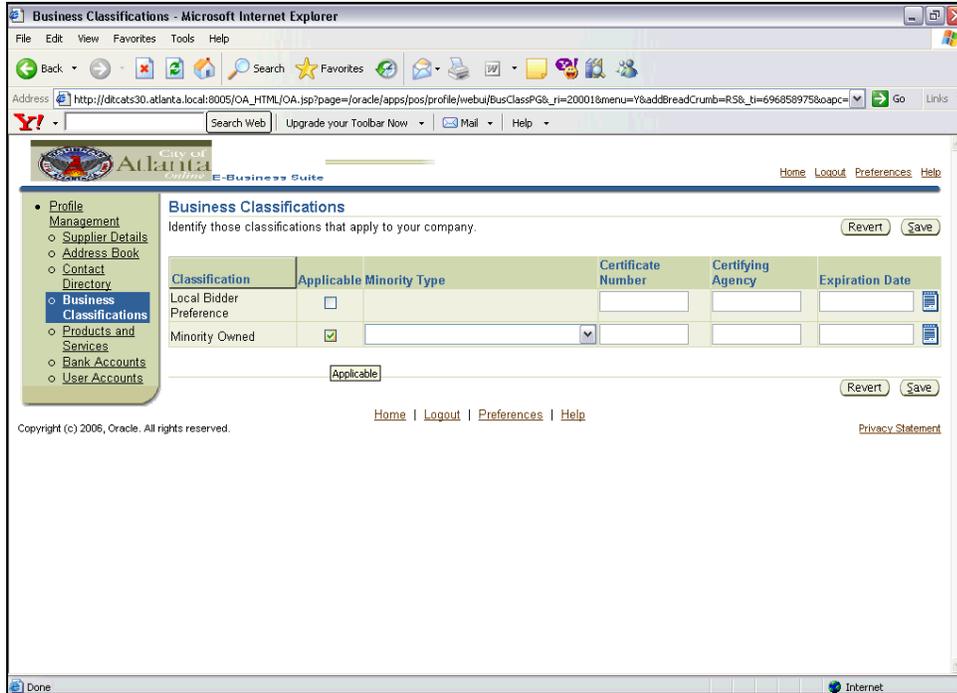
This is also called as "Business Classifications"



Step	Action
1.	Click the <b>Business Classifications</b> link. 



Step	Action
2.	Click the <b>Minority Owned</b> option. <input type="checkbox"/>



Step	Action
3.	Click the <b>African American Business Enterprise</b> list item. <input type="text" value="African American Business Enterprise"/>
4.	Click the <b>Save</b> button. <input type="button" value="Save"/>
5.	<b>End of Procedure.</b>

## Add new Products & Services

### Add new Products & Services

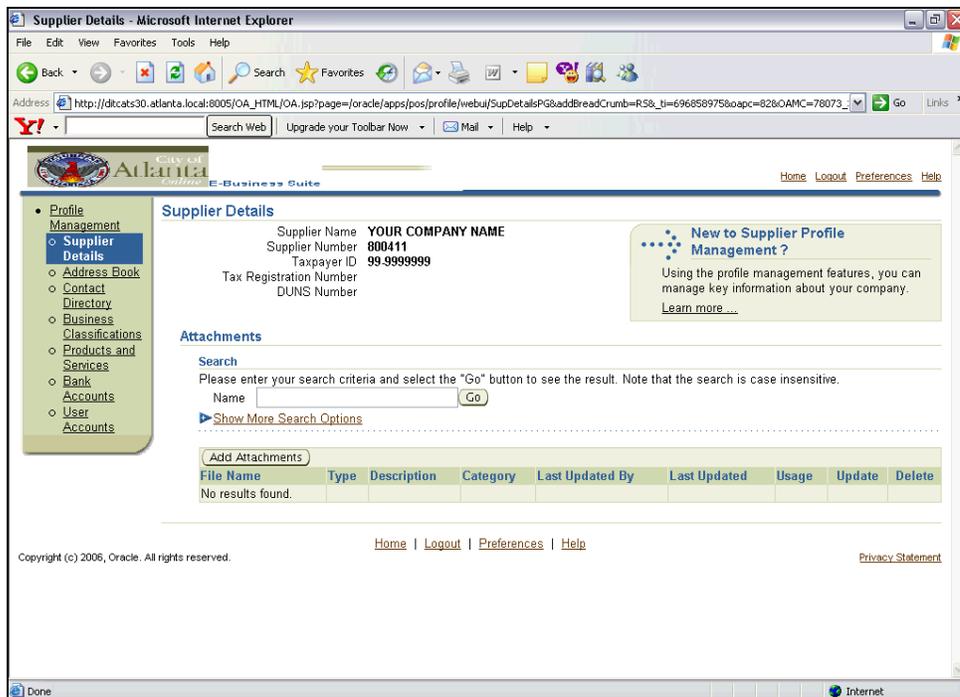
As a registered supplier, you can now keep an up-to-date list of Products and Services that you provide.

This is important for your business, because, the City uses this information and picks the Suppliers to be invited for a solicitation. If your Products and Services information with the City is incomplete/inaccurate, you may miss some potential opportunities to do business with the City.

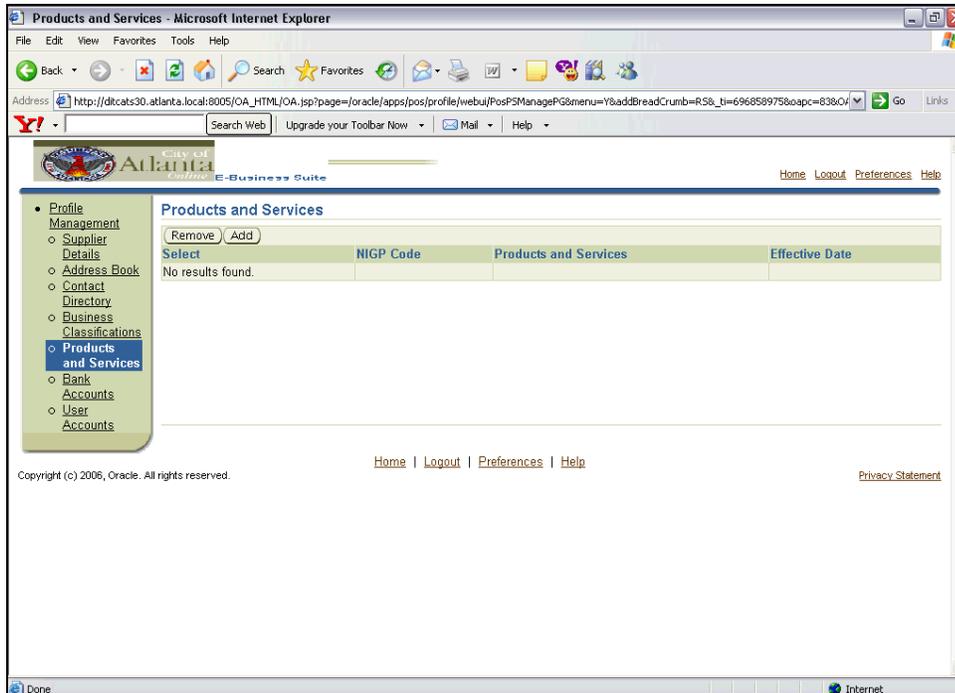
## Procedure

Let us learn to add Products and Services.

The product we provide is "Sodium Hydroxide" and we are going to add that to our list of products and services profile.

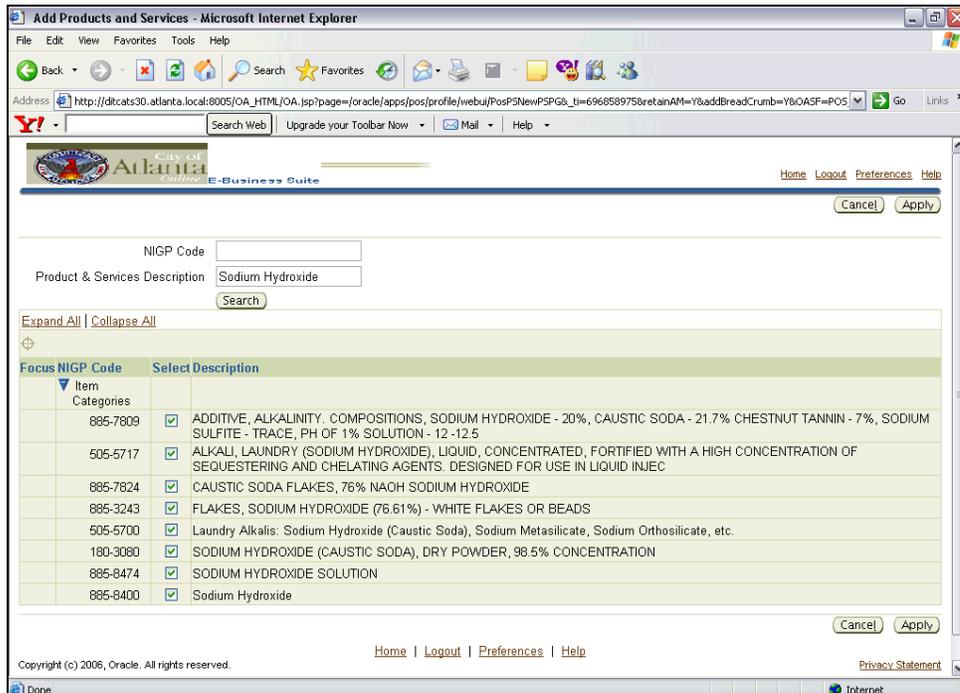


Step	Action
1.	Click the <b>Products and Services</b> link.



Step	Action
2.	Enter the desired information into the <b>Product &amp; Services Description</b> field. Enter " <b>Sodium Hydroxide</b> ".
3.	Click the <b>Search</b> button. <input type="button" value="Search"/>
4.	Click the <b>Sodium Hydroxide</b> option. <input type="checkbox"/>
5.	Click the <b>SODIUM HYDROXIDE SOLUTION</b> option. <input type="checkbox"/>
6.	Click the <b>SODIUM HYDROXIDE (CAUSTIC SODA), DRY POWDER, 98.5% CONCENTRATION</b> option. <input type="checkbox"/>
7.	Click the <b>ADDITIVE, ALKALINITY. COMPOSITIONS, SODIUM HYDROXIDE - 20%, CAUS</b> option. <input type="checkbox"/>
8.	Click the <b>ALKALI, LAUNDRY (SODIUM HYDROXIDE), LIQUID, CONCENTRATED, FORTIF</b> option. <input type="checkbox"/>
9.	Click the <b>CAUSTIC SODA FLAKES, 76% NAOH SODIUM HYDROXIDE</b> option. <input type="checkbox"/>

Step	Action
10.	Click the <b>FLAKES, SODIUM HYDROXIDE (76.61%) - WHITE FLAKES OR BEADS</b> option. <input type="checkbox"/>
11.	Click the <b>Laundry Alkalis: Sodium Hydroxide (Caustic Soda), Sodium Metasil</b> option. <input type="checkbox"/>



Step	Action
12.	Click the <b>Apply</b> button. <input type="button" value="Apply"/>
13.	<b>End of Procedure.</b>

## Delete new Products & Services

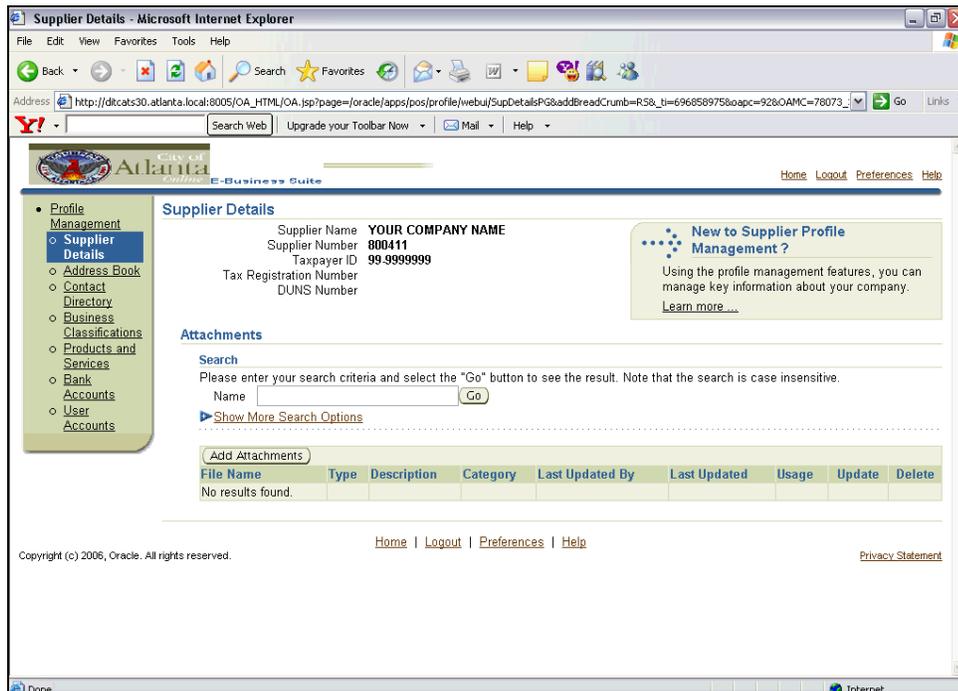
### Delete new Products & Services

If you do not provide a Product or a Service no longer, please ensure that you have removed that from your profile.

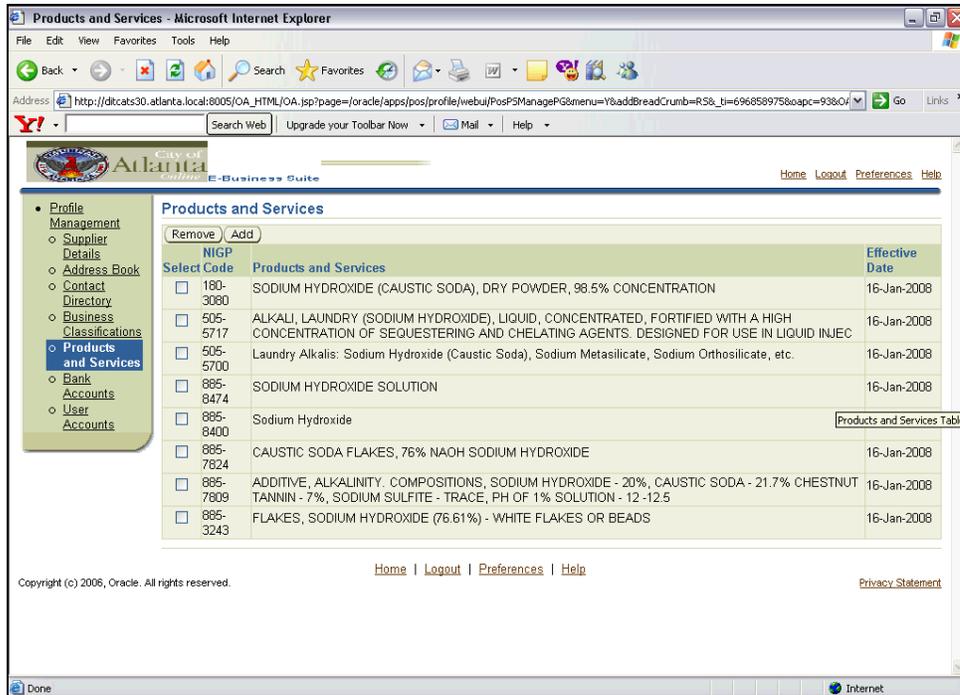
## Procedure

Let us learn to delete an obsolete Product that we do not provide anymore.

We do not provide "Caustic Soda Flakes" anymore and we are going to remove it from our Products & Services Profile.



Step	Action
1.	Click the <b>Products and Services</b> link.



Step	Action
2.	Click the <b>885-7824</b> option. <input type="checkbox"/>
3.	Click the <b>Remove</b> button. <input type="button" value="Remove"/>
4.	<b>End of Procedure.</b>

## View User Accounts

### View User Accounts

Managers must monitor this page frequently to avoid any unauthorized users logging into the system as your company.

Managers must work with the City to disable all unauthorized users on the system.

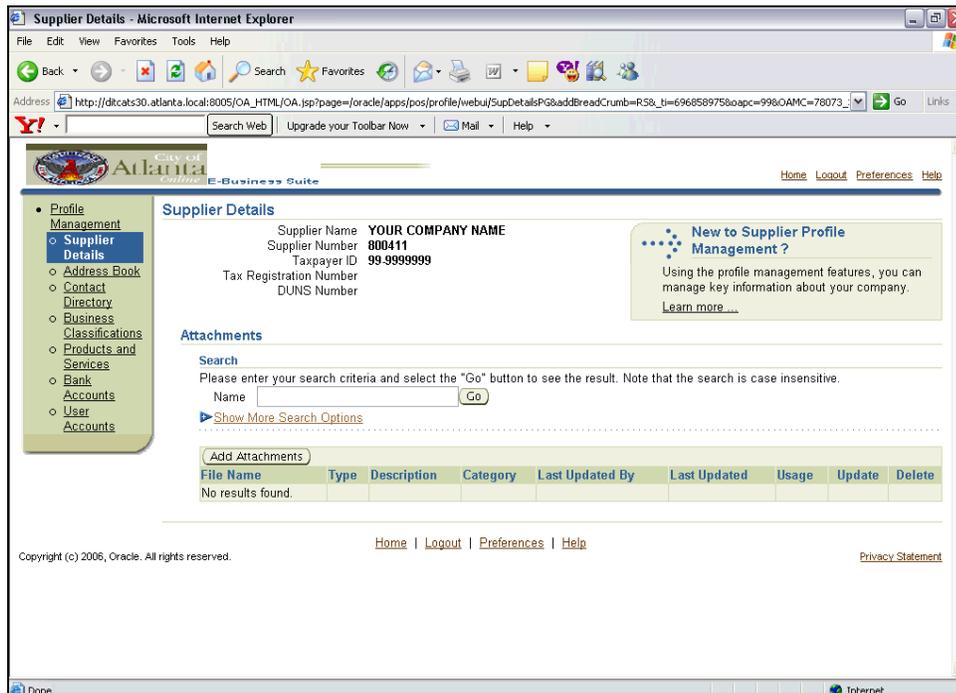
If any of your authorized user leave your organization, it is your responsibility to work with the City and have their accesses removed.

## Procedure

Let us learn to view the list of users who have an account with the City's purchasing application on your company's behalf.

Managers must monitor this page frequently to avoid any unauthorized users logging into the system as your company.

Managers must work with the City to disable all unauthorized users on the system.



Step	Action
1.	Click the <b>User Accounts</b> link. 
2.	<b>End of Procedure.</b>



## **Monitor Purchase Orders**

### **Monitor Purchase Orders**

For every purchase order issued by the City, the supplier will receive an instantaneous e-mail notification from the application detailing the order. Suppliers can view their purchase orders and initiate a change request.

Suppliers will also have the ability to view their shipment details and know if they were received by the City.

Only suppliers, who have furnished their Products & Services or who have completed their Phase - II registration process will be eligible to monitor POs.

Upon successful completion of Phase - II registration process, the City will grant a new "Home Page" with advanced features to the Suppliers.

## **Login to iSupplier Portal**

### *Login to iSupplier Portal*

If you do not see the "Home Page" shown at the end of this exercise, then you may not have completed your Phase - II registration process which involves specification of your "Business Classifications" and the "Products & Services" your organization provides.

If you had already completed the Phase - II registration Process, then please allow 2 -3 business days for the City to process your application.

If you are a construction service provider, then your "Home Page" may say "COA iSupplier 2-Way Vendors" instead of "COA iSupplier 3-Way Vendors". There is no difference between the two and at this point you may proceed with this tutorial.

## **Procedure**

Before you proceed, please ensure that you have completed your Phase - II registration process.

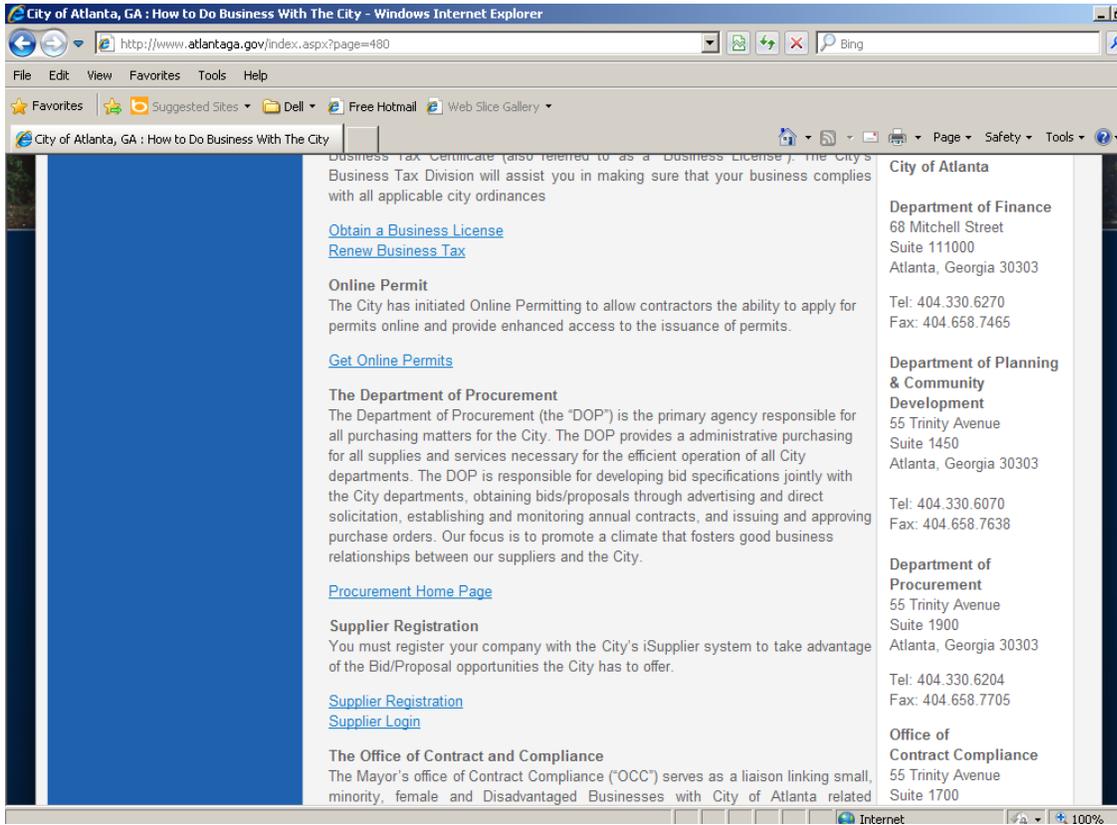
You are required to complete your Phase - II registration process to utilize the advanced features described in this chapter.



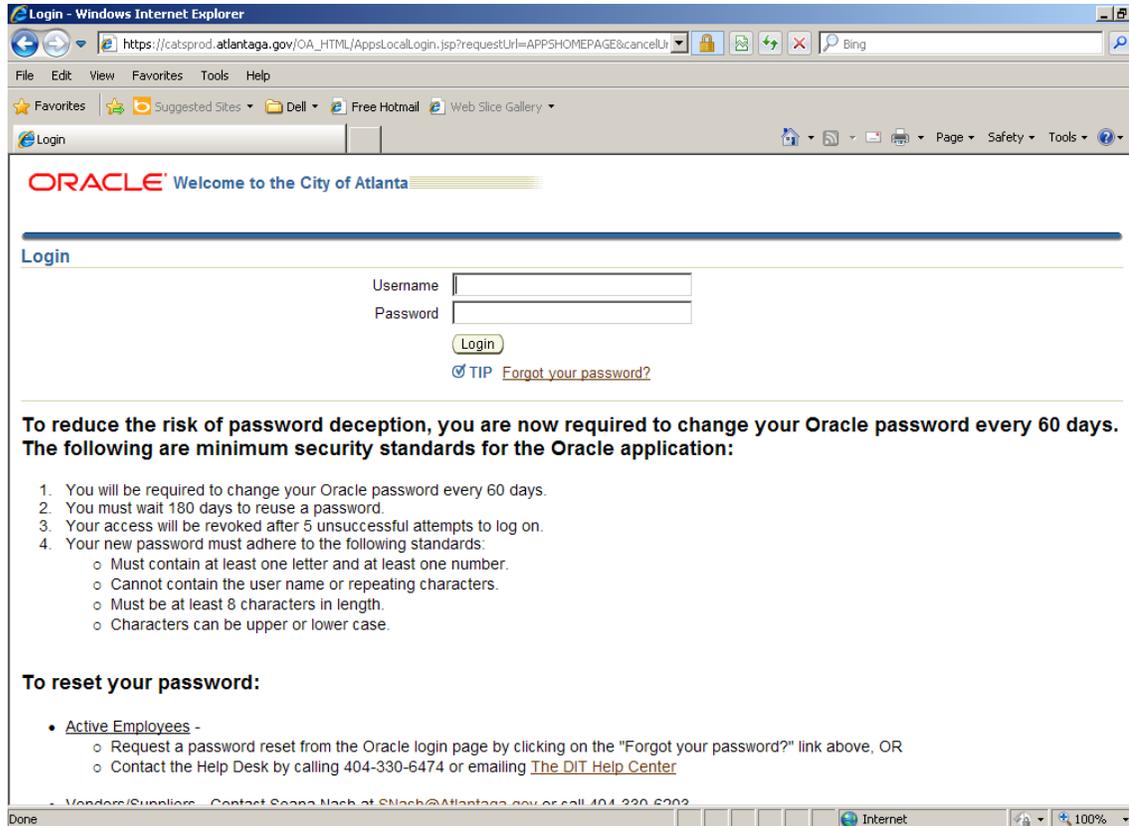
Step	Action
1.	<p>Go to the City's website.</p> <p>City's website is: <a href="http://www.atlantaga.gov">www.atlantaga.gov</a></p> <p>Type this on the address field of the browser and Click the Go Button.</p>



Step	Action
2.	Point to the <b>Doing Business</b> object.
3.	Click the <b>How To Do Business With The City</b> object. <div style="border: 1px solid black; background-color: #ffffcc; padding: 2px; display: inline-block;">How To Do Business With The City</div>



Step	Action
4.	Scroll down on the Supplier Registration page
5.	Click on <b>Supplier Login</b>



Step	Action
1.	<p>Enter the desired information into the <b>Password</b> field. Enter "<b>welcome1</b>".</p> <p>This is the applications login page. You can bookmark this page for easier access.</p> <p>Enter your username and password credentials to access the application.</p>
2.	<p>Click the <b>Login</b> button.</p> 

Step	Action
3.	<p>Have you noticed that your Homepage after the Phase - II registration has changed? You are now allowed to utilize more advanced features of this application and working with the City just got that much easier.</p> <p>If you had chosen "Construction Services" related Products &amp; Services during your Phase - II registration process, you may see a slightly different Homepage that would read "COA iSupplier 2-Way Vendors" instead of "COA iSupplier 3-Way Vendors". At this point there is no difference between the two and you may continue with this exercise.</p> <p>If you are seeing a totally different Homepage, then you may not have completed your Phase - II registration process. Please go over the previous chapter on how to complete the Phase - II registration process.</p> <p>If you had already completed the Phase - II registration process, yet getting the same old Homepage, please allow 2-3 business days for the City to process your application.</p> <p><b>End of Procedure.</b></p>

## **View Purchase Orders**

### *View Purchase Orders*

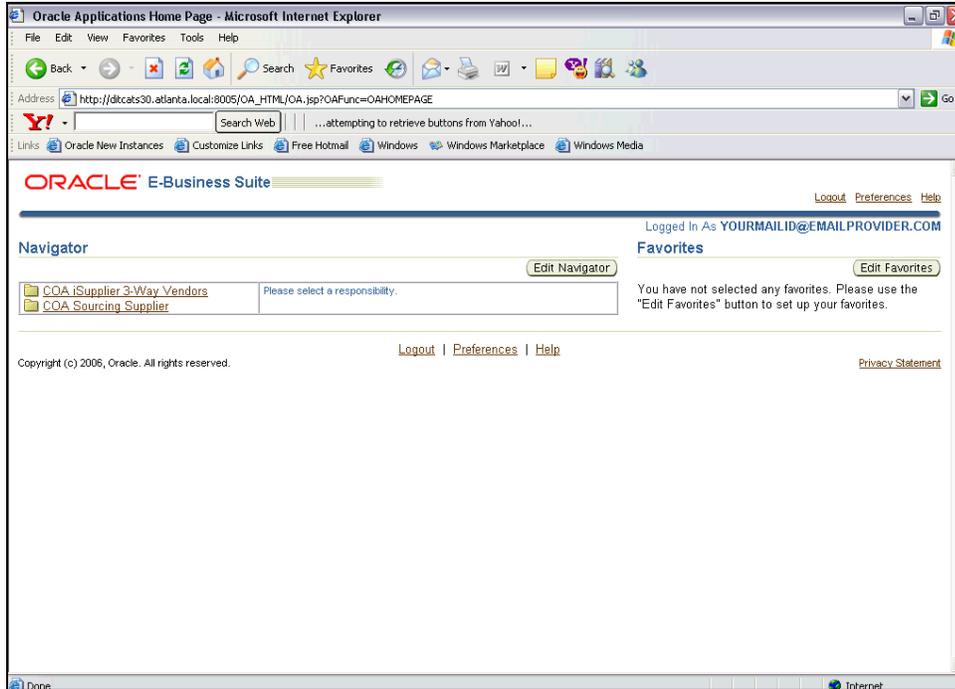
The registered user of your organization will receive an email notification from the City's application for every issuance of a purchase order.

Your authorized user can then login to City's website to review the purchase orders.

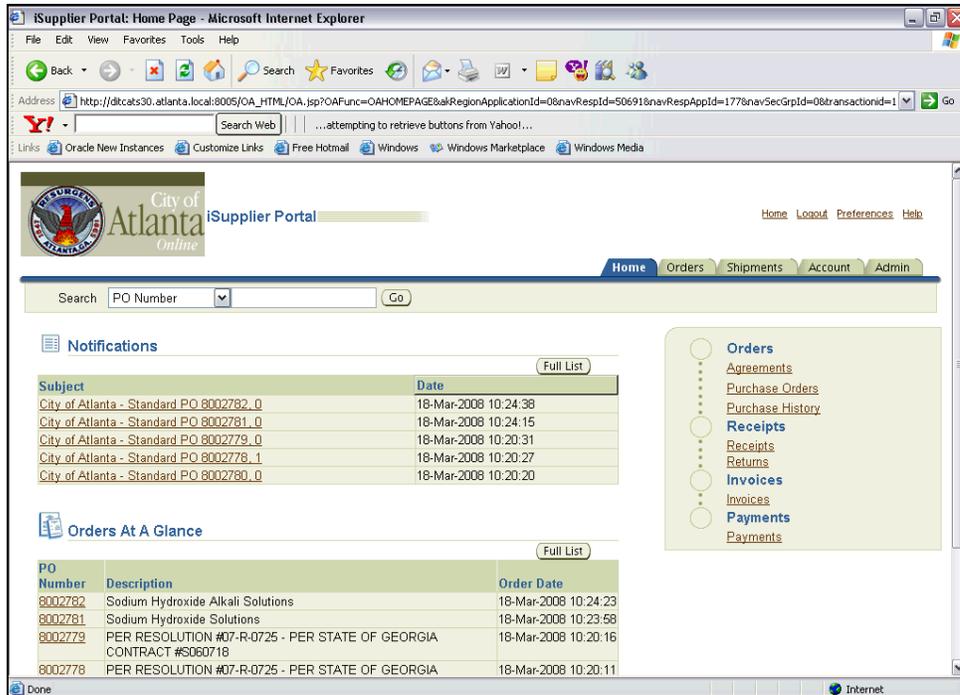
## **Procedure**

With this exercise, you will learn how to

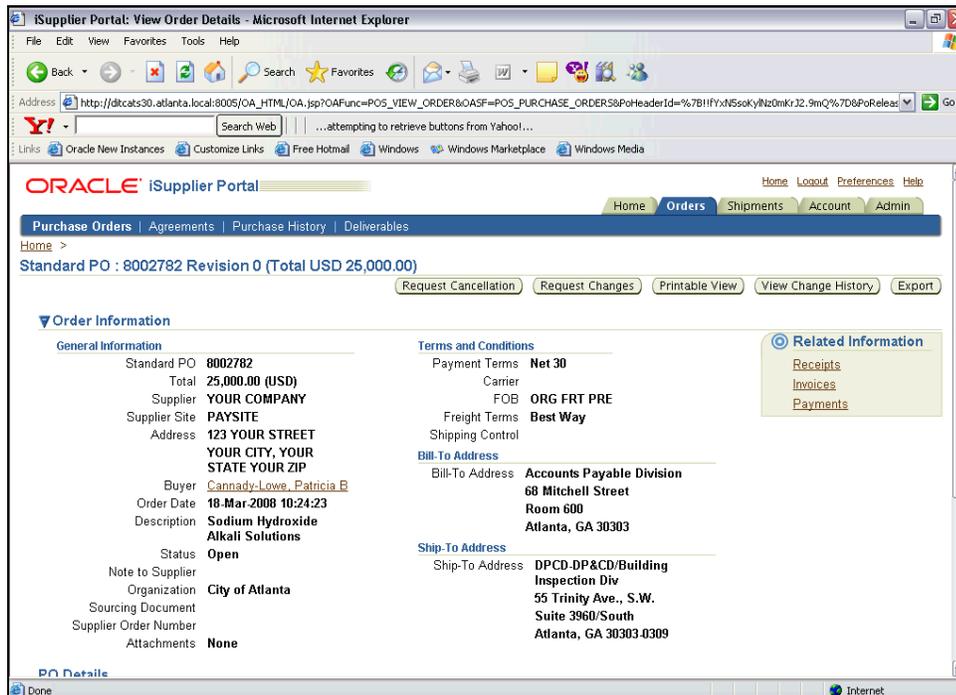
1. View POs
2. Print POs
3. Request Changes
4. Request Cancellations
5. View PO Change History
6. View File Attachments to a PO.



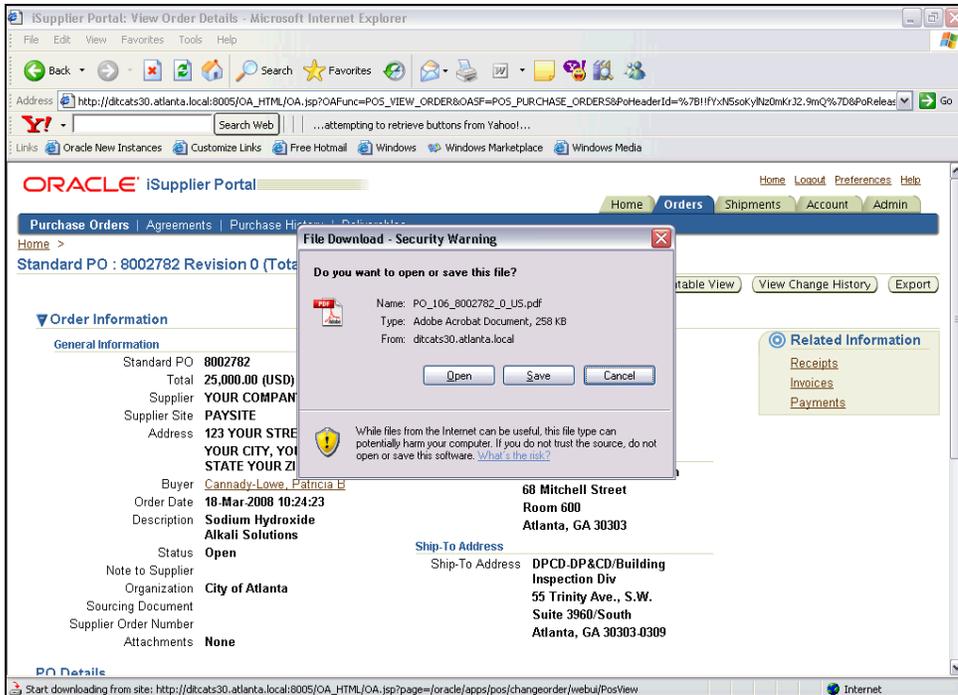
Step	Action
1.	Point to the <b>COA iSupplier 3-Way Vendors</b> object. <a href="#">COA iSupplier 3-Way Vendors</a>
2.	Click the <b>COA iSupplier 3-Way Vendors</b> link. <a href="#">COA iSupplier 3-Way Vendors</a>

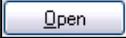


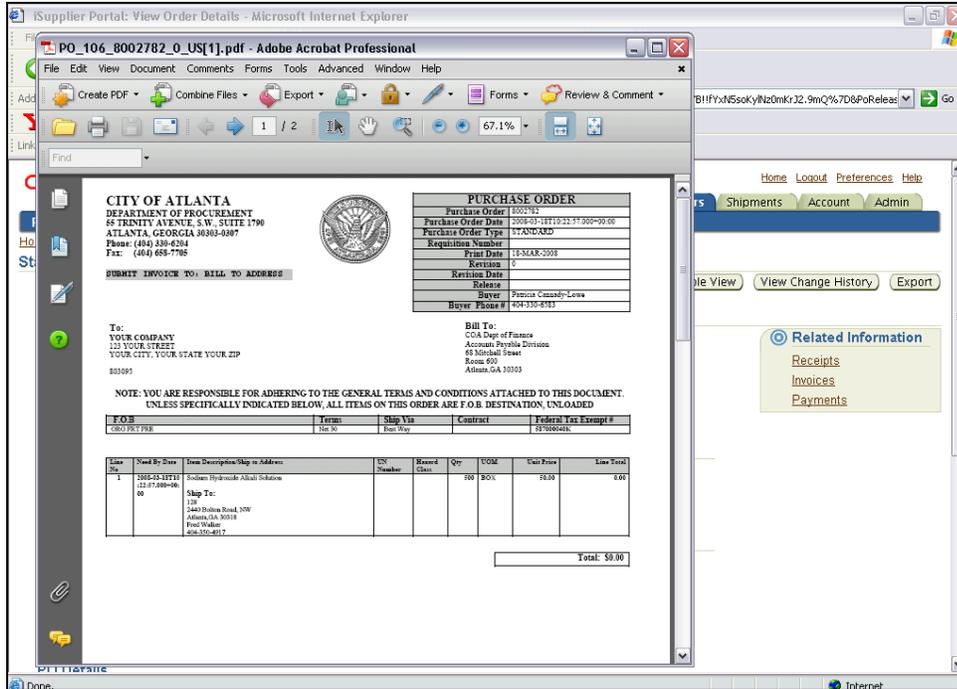
Step	Action
3.	<p>Point to the <b>8002782</b> object. This is the "Purchase Orders" Home Page.</p> <p>Under the Notifications section, you will find the recent email notifications from the City. You may click the "Full List" to view all your notifications from the City.</p> <p>Under the "Orders at a Glance", you will find your recent Purchase Orders. You may click "Full List" to view all the purchase orders from the City.</p> <p>To your right, you will find a panel with a bunch of links. These links are shortcuts clicking them will take you to the appropriate screen. For example, if you click on the Invoices link on the right hand side panel, you will be taken directly to the "Invoices Summary" page.</p> <p>You may click on any of the PO Number link to view the respective Purchase Order.</p> <p>In this example, we are clicking "8002782" to open the PO. You may have a different number.</p> <p><b>8002782</b></p>
4.	<p>Click the <b>8002782</b> link. Click on the PO Number to Open the purchase order.</p> <p><b>8002782</b></p>



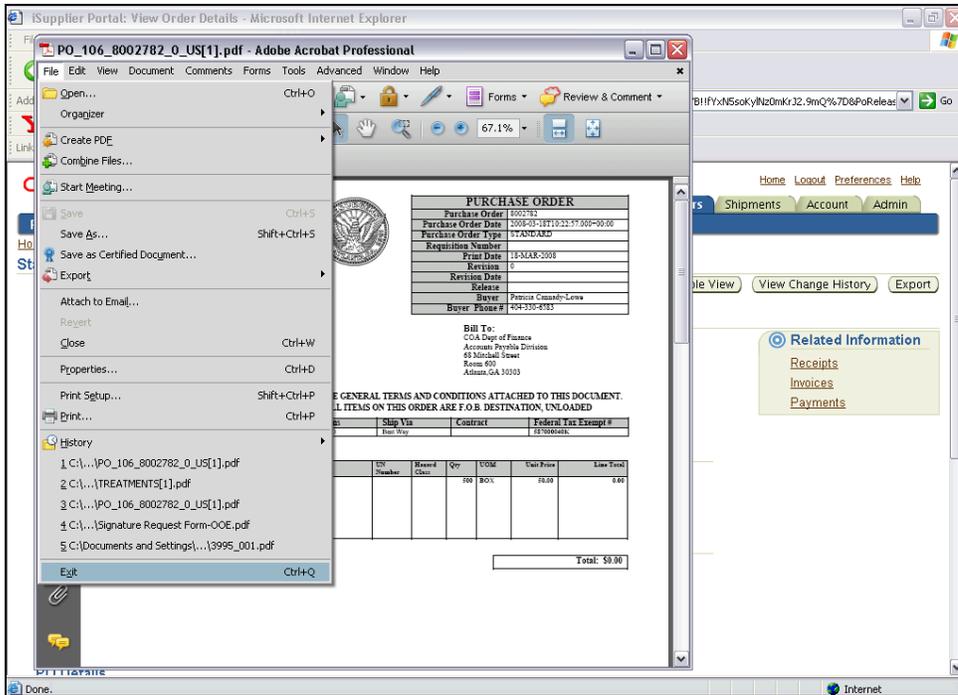
Step	Action
5.	<p>Scroll the object with the mouse wheel. Upon clicking the PO number, this the page that you will get.</p> <p>This page gives you the entire PO detail.</p>
6.	<p>Click the <b>Select to show information</b> button. You may click on the + sign to view the shipment details.</p> 
7.	<p>Scroll the <b>500</b> object with the mouse wheel. Scroll down to view more details.</p>
8.	<p>Release the mouse button. Shipment details are shown here.</p>
9.	<p>Click the <b>Printable View</b> button. Let us learn how to print the current Purchase Order.</p> <p>You may click the "Printable View" button to print the Purchase Order.</p> 



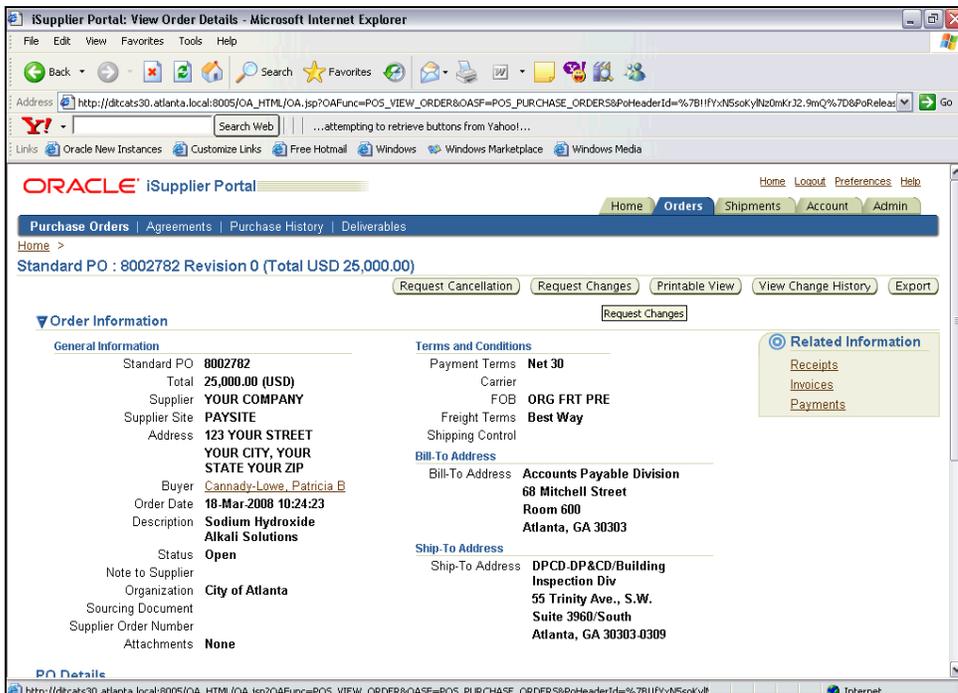
Step	Action
10.	<p>Point to the <b>Open</b> object.</p> <p>When the shown dialog box opens, click on Open to view the document in Printable format.</p> <p>You may require Adobe Reader for this action. If you do not have one, You can download it from here.</p> 
11.	<p>Click the <b>Open</b> button.</p>  <p>or</p> <p>Press <b>[Alt+O]</b>.</p>



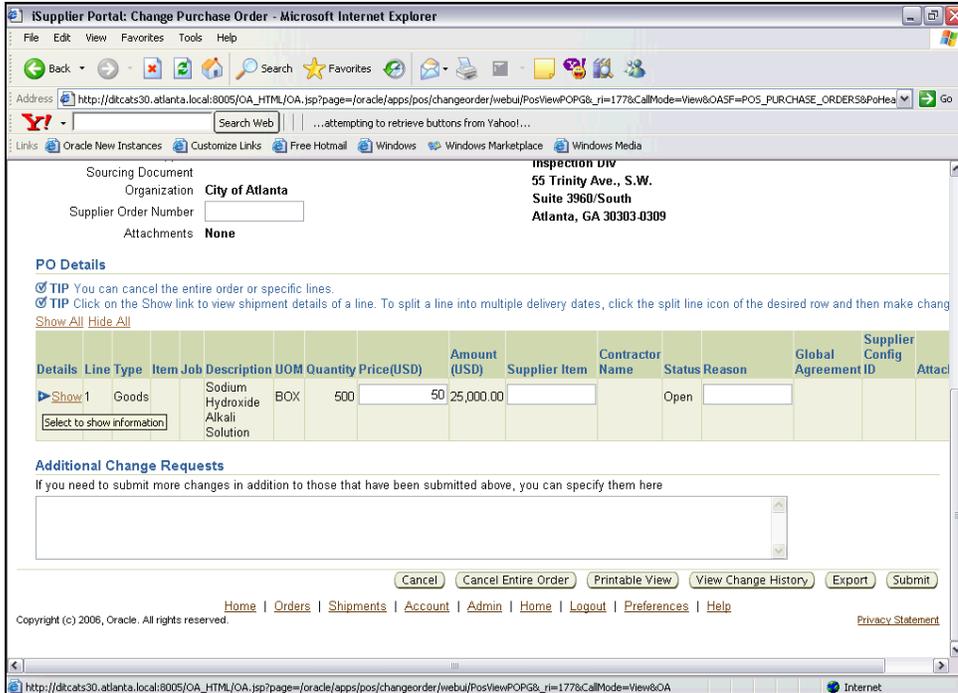
Step	Action
12.	<p>Click the <b>File</b> menu. You can print this document like printing any other document from your computer.</p> <p>You may choose File&gt;Print to print this document.</p> <p><input type="button" value="File"/></p> <p><i>or</i> Press <b>[Alt+F]</b>.</p>



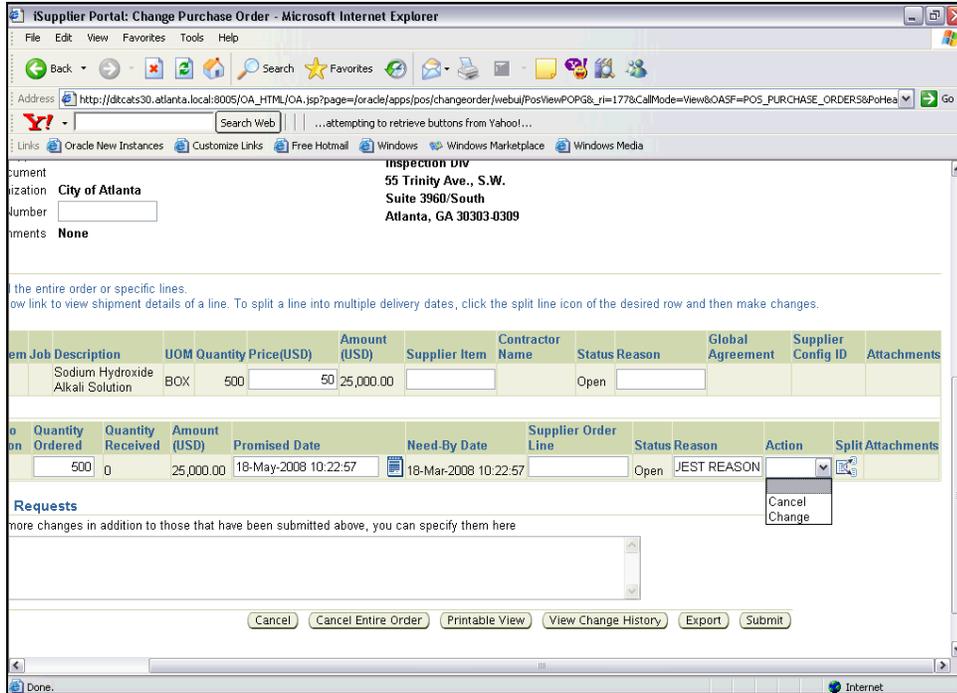
Step	Action
13.	Scroll the object with the mouse wheel. After printing the document, you may exit out of this printable version.

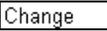
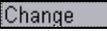


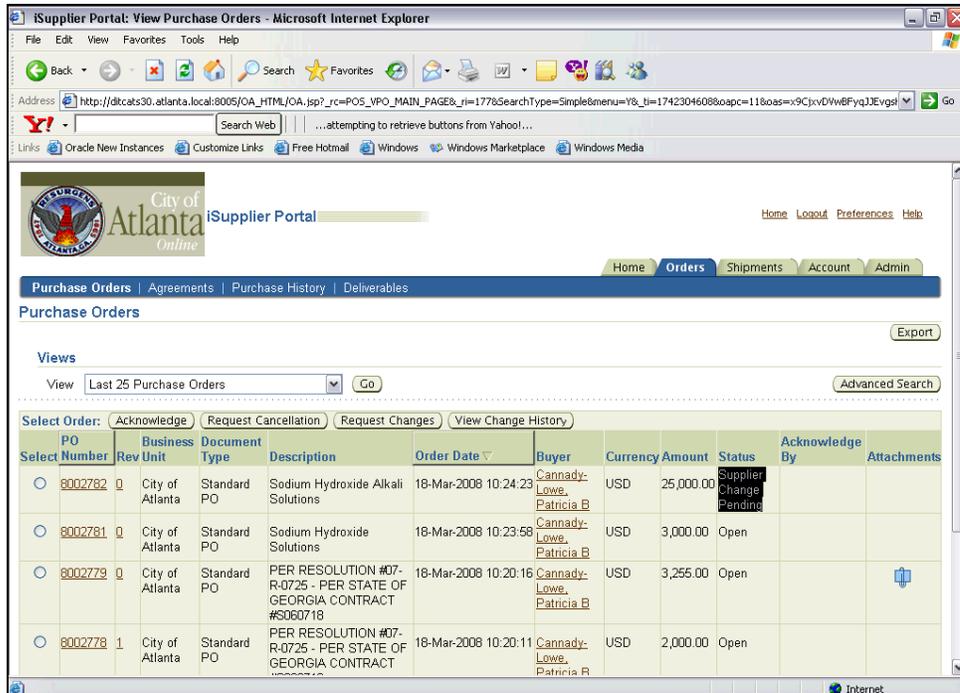
Step	Action
14.	<p>Click the <b>Request Changes</b> button. Let us learn, how to request changes to a Purchase Order.</p> <p>You may open up the purchase order for which you are requesting changes as shown in the previous step. In this example, we are going to request changes for PO # 8002782. Your PO number may be different.</p> <p>Once the PO opens up, you may click on the "Request Changes" button as shown to request your changes.</p> <p>In this example, we are going to request the City to push the Shipment date specified in the Purchase Order.</p> <p>Please remember that, this is only a change-request to the Purchase Order made by you and by no means is the final document until the changes are approved by City's buyer.</p> <p>If the buyer rejects your proposal, no changes are made to the PO.</p> <p><input type="button" value="Request Changes"/></p>



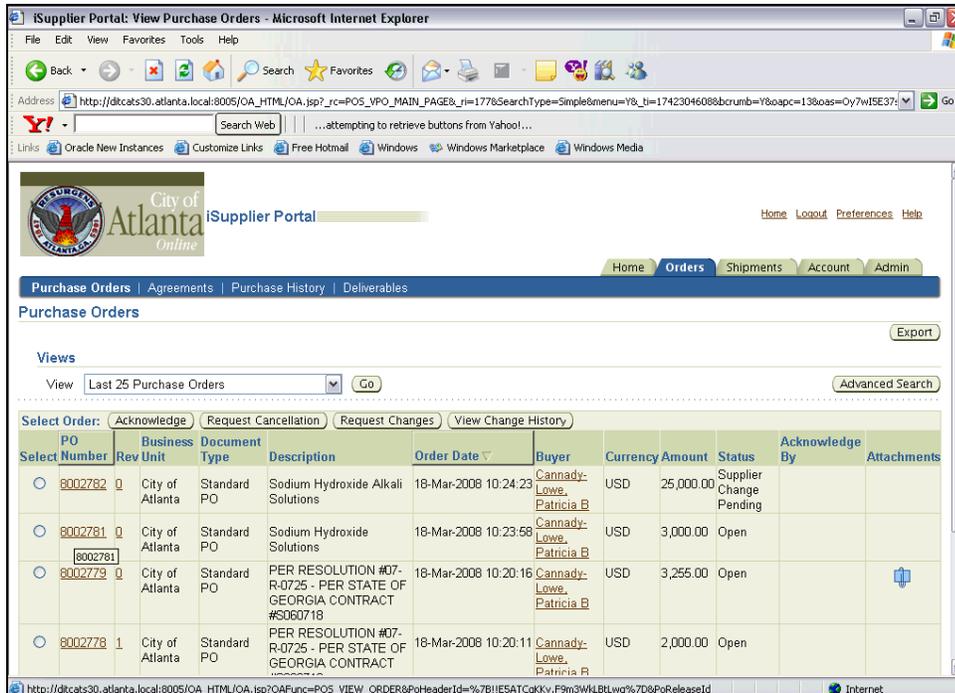
Step	Action
15.	Click the <b>Select to show information</b> button. Click on + Show to view the shipment details. 
16.	Enter the desired information into the <b>Promised Date</b> field. Enter " <b>May</b> ". We are going to request the City to move the Promised date to May.  For every change that you request, you will have to furnish a reason for the request.
17.	Enter the desired information into the <b>Split</b> field. Enter " <b>YOUR CHANGE REQUEST REASON</b> ". Enter the reason for your change request.



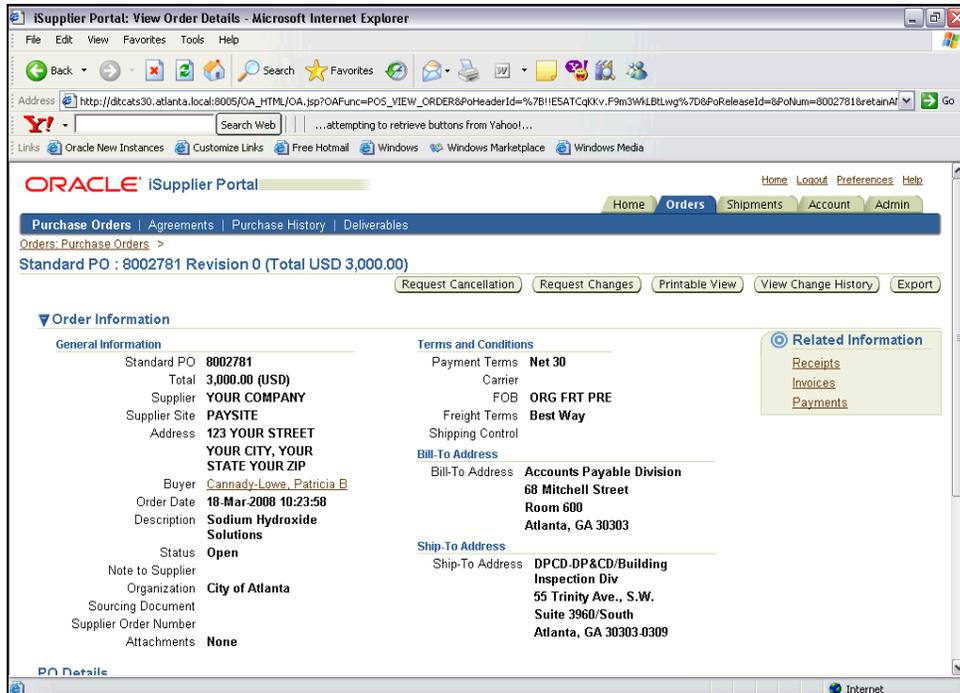
Step	Action
18.	Point to the <b>Change</b> object. In this exercise, we are requesting a change to the PO and therefore choose "Change" for Action. 
19.	Click the <b>Change</b> list item. 
20.	Point to the <b>Submit</b> object. 
21.	Click the <b>Submit</b> button. 
22.	Click the <b>Return to Purchase Order Summary</b> link. 



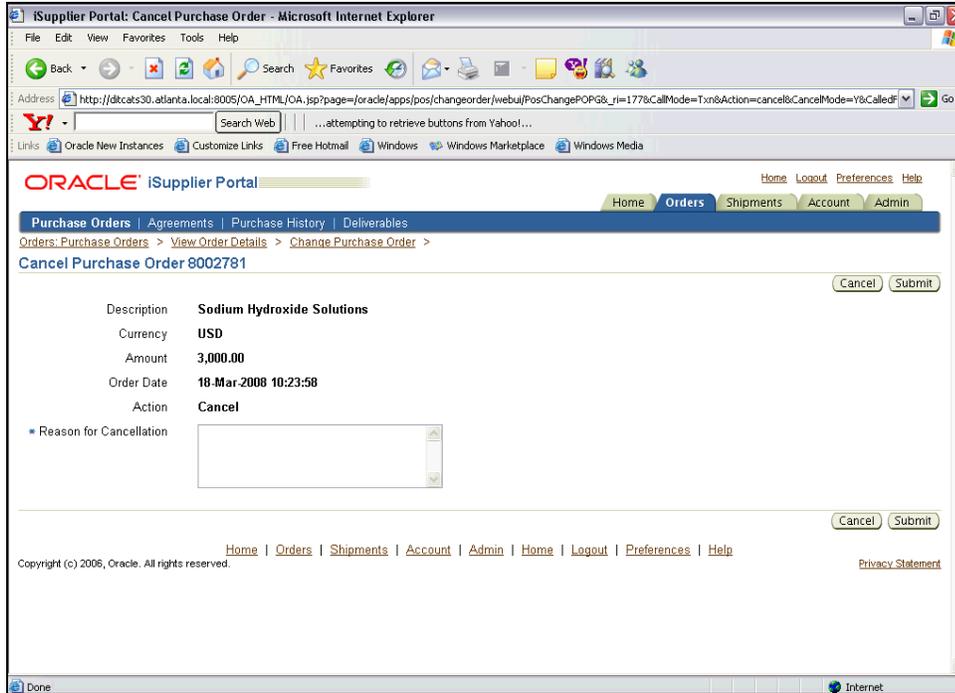
Step	Action
23.	<p>Click the <b>Orders: Purchase Orders</b> link.</p> <p>Note the status of the previously change requested PO.</p> <p>The status of the change-requested PO is no longer Open and is now "Supplier Change Pending".</p> <p>You may not be able to request any further changes including cancellation, until the pending changes are reviewed by the City's buyer and the changes get either Approved or Rejected by the same.</p> <p><input type="radio"/> <input type="radio"/> 8002781 <input type="radio"/></p>



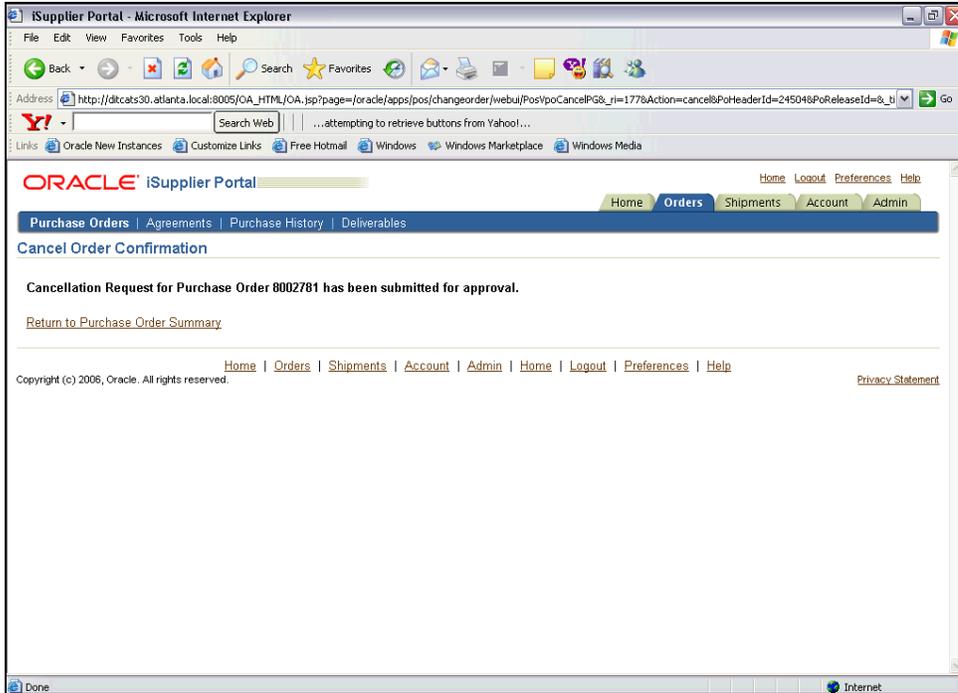
Step	Action
24.	<p>Click the <a href="#">8002781</a> link.</p> <p>Let us now try to request a cancellation of a Purchase Order.</p> <p>As a supplier, you may request the City to cancel a PO.</p> <p>The PO will not be considered cancelled just because of your cancellation request and will remain open until the City's buyer approves your request.</p> <p>If your cancellation request is approved by the Buyer, then the PO will be cancelled.</p> <p>If your cancellation request is rejected by the Buyer, then the PO will be still open.</p> <p>Click on the PO to be cancelled to open. In our example, we choose <a href="#">8002781</a> and you may have a different number.</p> <p><a href="#">8002781</a></p>



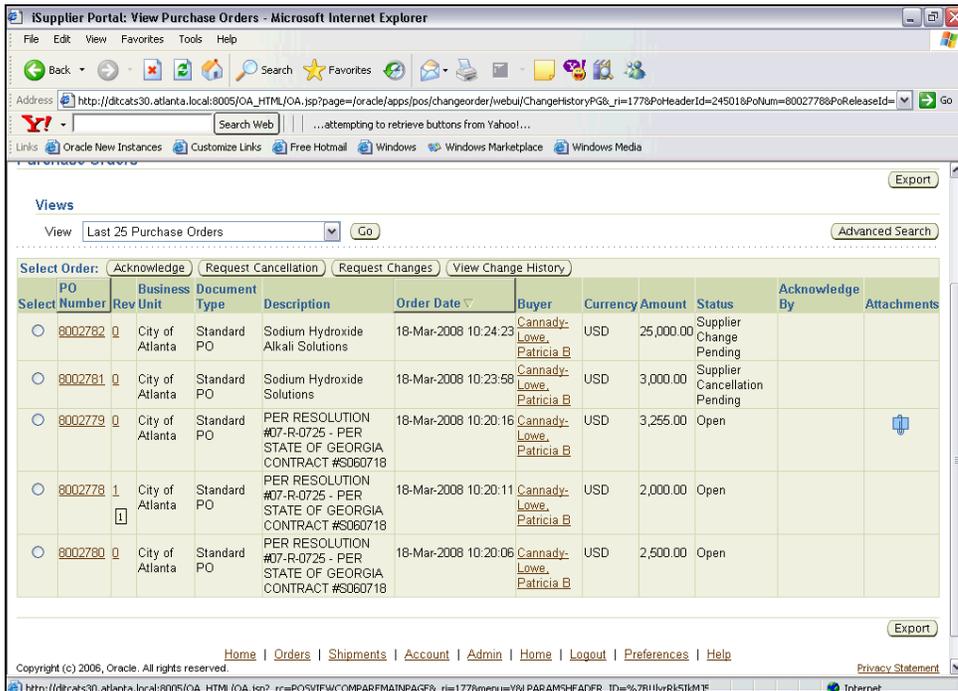
Step	Action
25.	<p>Click the <b>Request Cancellation</b> button.</p> <p>The PO Request Cancellation process begins with Opening the PO and then clicking on the Request Cancellation Button.</p> <p><input type="button" value="Request Cancellation"/></p>
26.	<p>Point to the <b>Cancel Entire Order</b> object.</p> <p>If the request is for cancelling the entire order, you may click on the "Cancel Entire Order" button.</p> <p>You will also have the ability to cancel a partial order if the PO has multiple line items.</p> <p><input type="button" value="Cancel Entire Order"/></p>
27.	<p>Click the <b>Cancel Entire Order</b> button.</p> <p><input type="button" value="Cancel Entire Order"/></p>



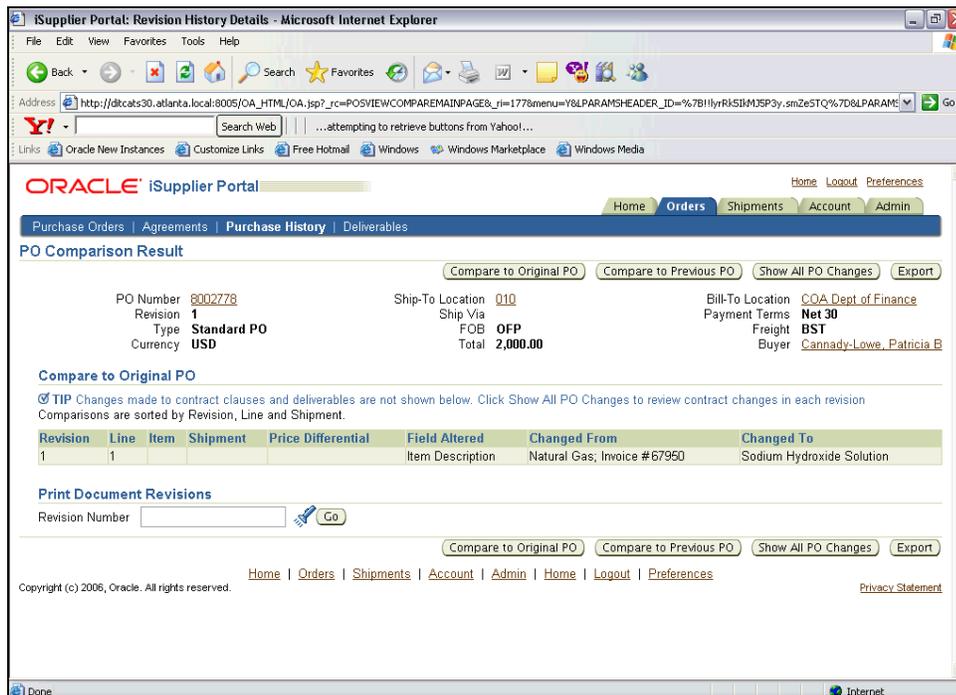
Step	Action
28.	Enter the desired information into the <b>Reason for Cancellation</b> field. Enter <b>"YOUR CANCELLATION REQUEST REASON"</b> . You have to furnish a valid reason for your request for cancellation.
29.	Click the <b>Submit</b> button. 

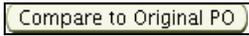


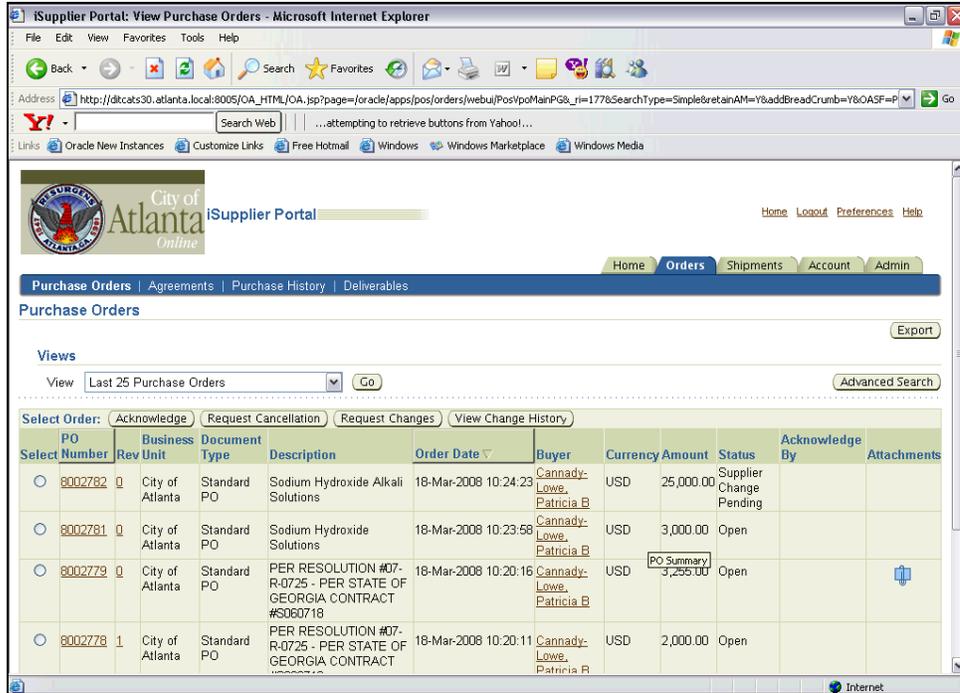
Step	Action
30.	Scroll the <b>Advanced Search</b> object with the mouse wheel.



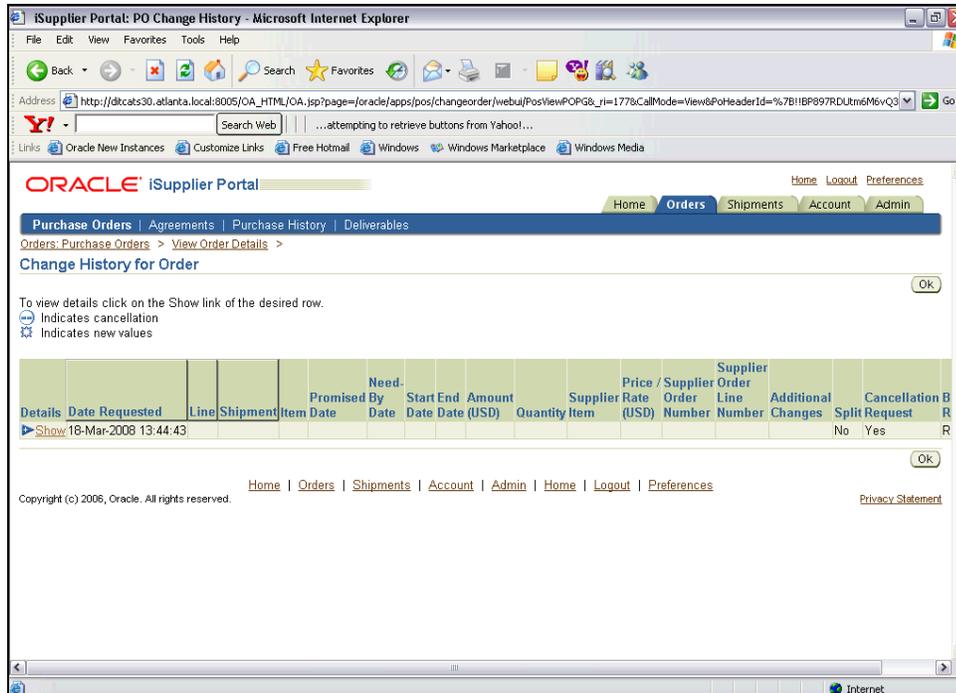
Step	Action
31.	<p>Click the <b>1</b> link.</p> <p>Let us learn to review the changes history.</p> <p>Click on the "Rev" (stands for Revision number of the purchasing document) to open up the new revision.</p> 



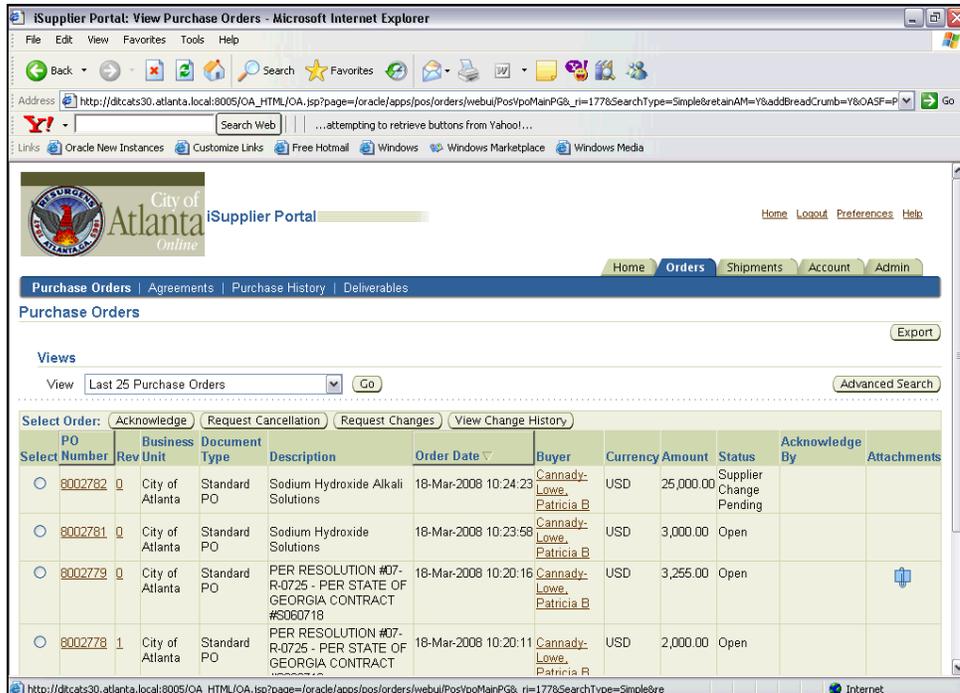
Step	Action
32.	<p>Click the <b>Compare to Original PO</b> button.</p> 
33.	<p>Point to the <b>Changed From</b> object.</p> <p>Review Changed From and To fields.</p> 



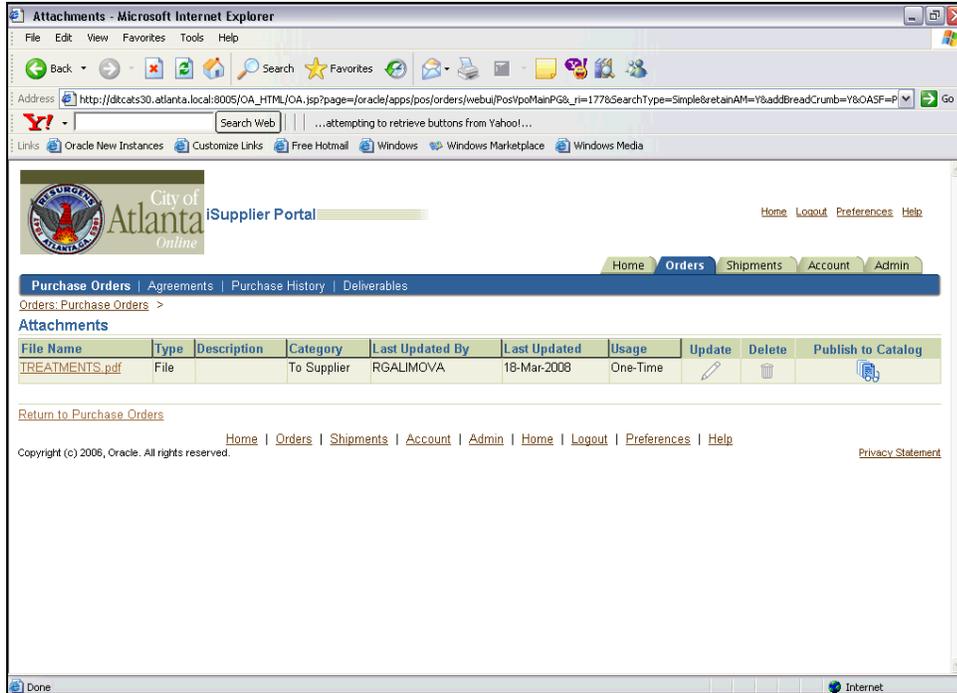
Step	Action
34.	<p>Click the <b>8002781</b> link.</p> <p>Let us examine how a PO looks after a change-request / cancel-request has been reviewed by the City's Buyer.</p> <p>In our example, we earlier requested cancellation of PO # 8002781. Now let us revisit the PO, as the City's buyer have reviewed our request.</p> <p>Let us open the PO 8002781.</p> <p><a href="#">8002781</a></p>
35.	<p>Click the <b>View Change History</b> button.</p> <p>Now let us view the change history of this PO.</p> <p><a href="#">View Change History</a></p>



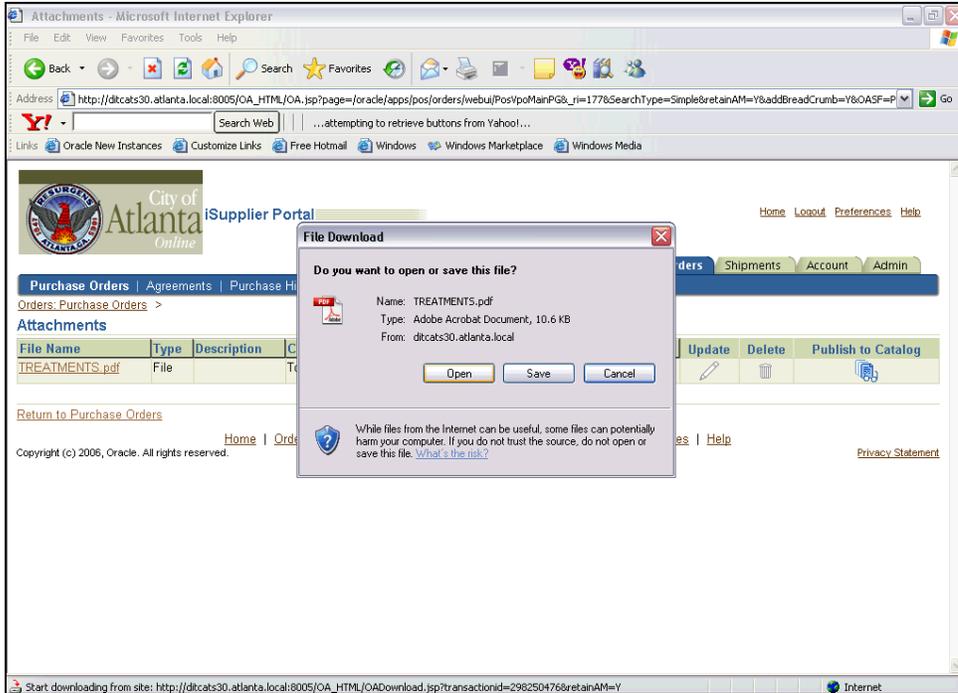
Step	Action
36.	<p>Release the mouse button.</p> <p>Note : Under Cancellation Request we have "Yes" indicating that we had earlier requested for cancellation of this PO.</p> <p>Also note the Buyer Response on the extreme right.</p>
37.	<p>Click the <b>Select to show information</b> button.</p> 
38.	<p>Point to the <b>Logout</b> object.</p> <p>You may notice the response reason and other details from the City.</p> 
39.	<p>Click the <b>Orders</b> tab.</p> 



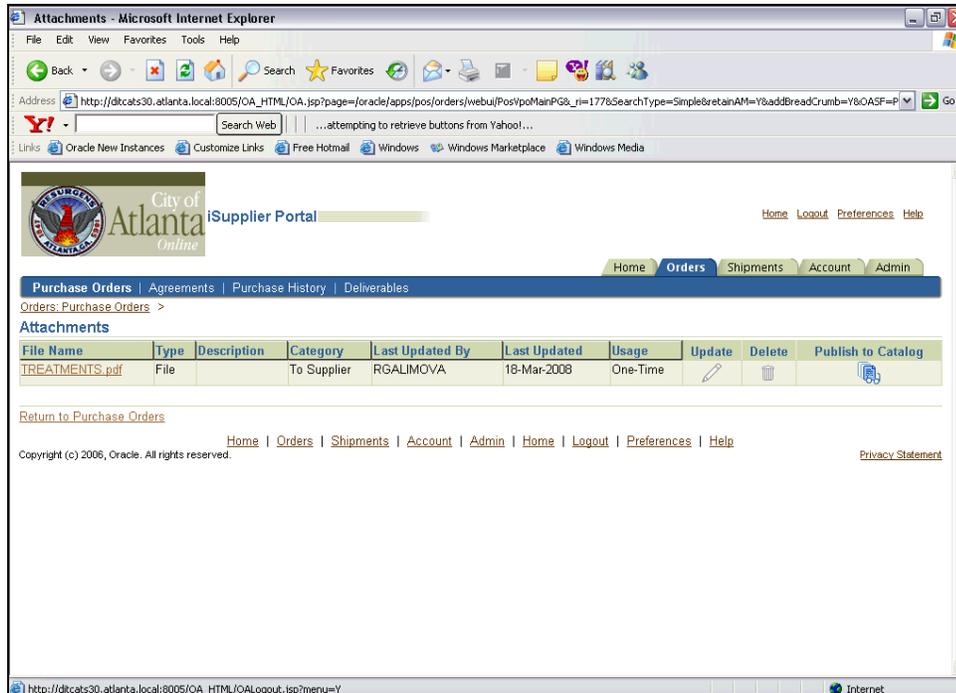
Step	Action
40.	<p>Click the <b>Paper Clip</b> button. Let us now see, how to view any file attachments to a Purchase Order.</p> <p>The City may use some of the advanced feature of the new application including file attachments.</p> <p>In some cases, the City may choose to attach the picture of the product that they are procuring instead of a real lengthy description. (The picture may have been taken from your catalog).</p> <p>You may need to know how to view such file attachments.</p> <p>Look for the Paper Clip Icon on the Attachments List.</p> 



Step	Action
41.	Click the <b>TREATMENTS.pdf</b> link. TREATMENTS.pdf is the name of this file. Your file name may be different. <a href="#">TREATMENTS.pdf</a>



Step	Action
42.	<p>Click the <b>File</b> menu. You may need an Adobe Reader for viewing this.</p>  <p><i>or</i> Press <b>[Alt+F]</b>.</p>
43.	<p>Click the menu.</p> 



Step	Action
44.	Point to the <b>Logout</b> object. 
45.	<b>End of Procedure.</b>

## View Receipts

### View Receipts

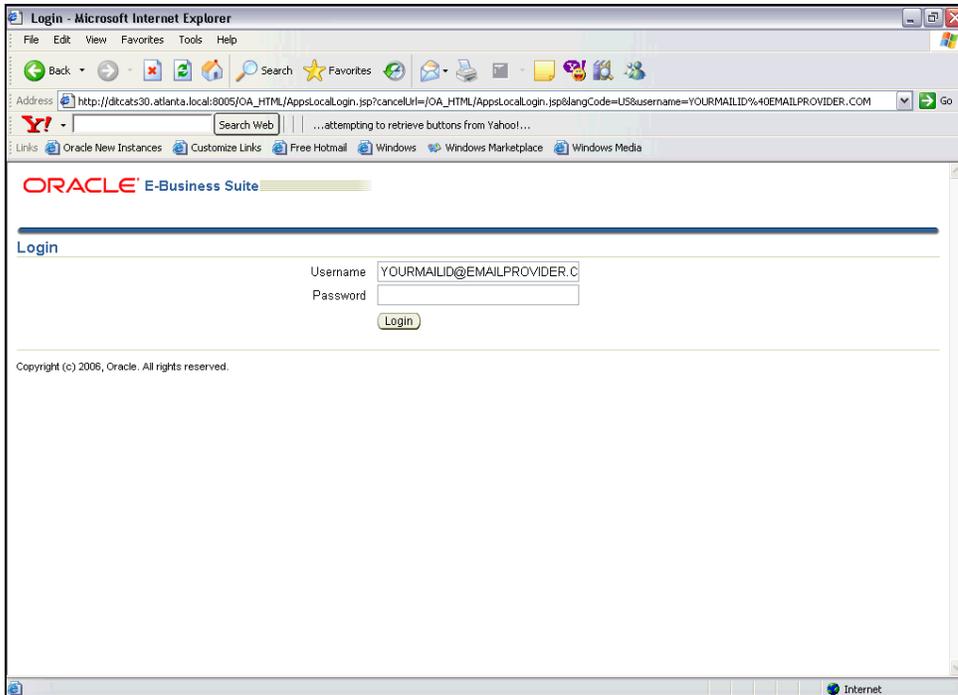
With this application, you may be able to monitor if your shipments have been received by the City. This information may be of particular importance as your payment may depend on the receiving of your shipped items. You may be able to invoice the City online once the City had received your shipments.

Your authorized user can then login to City's website to review the shipment details.

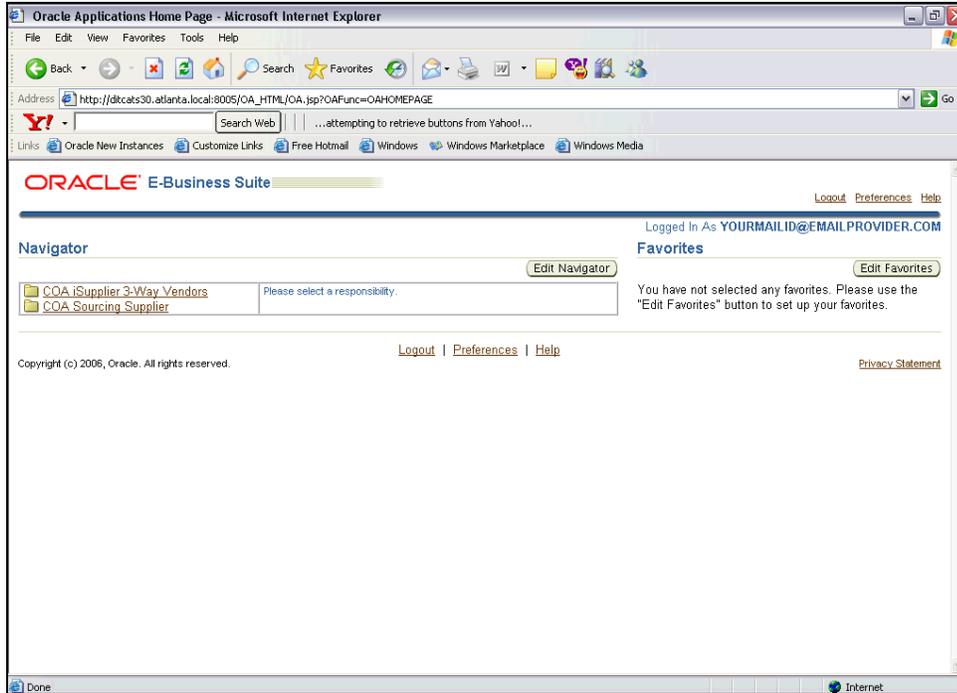
## Procedure

With this exercise, we are going to learn :

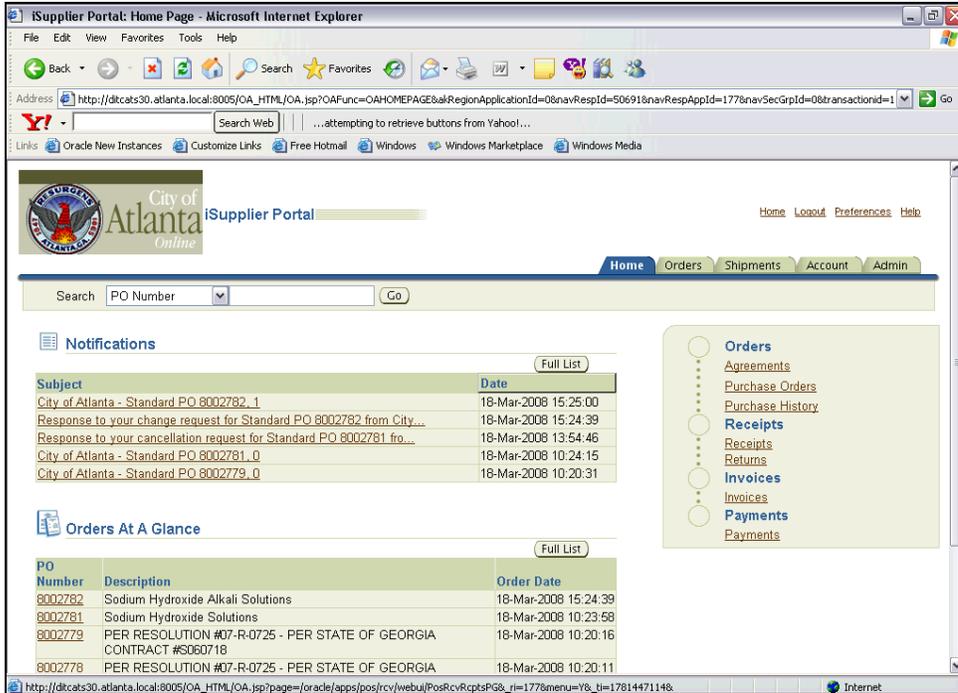
1. View Received Goods (Receipts)
2. View Returned Goods (Returns)



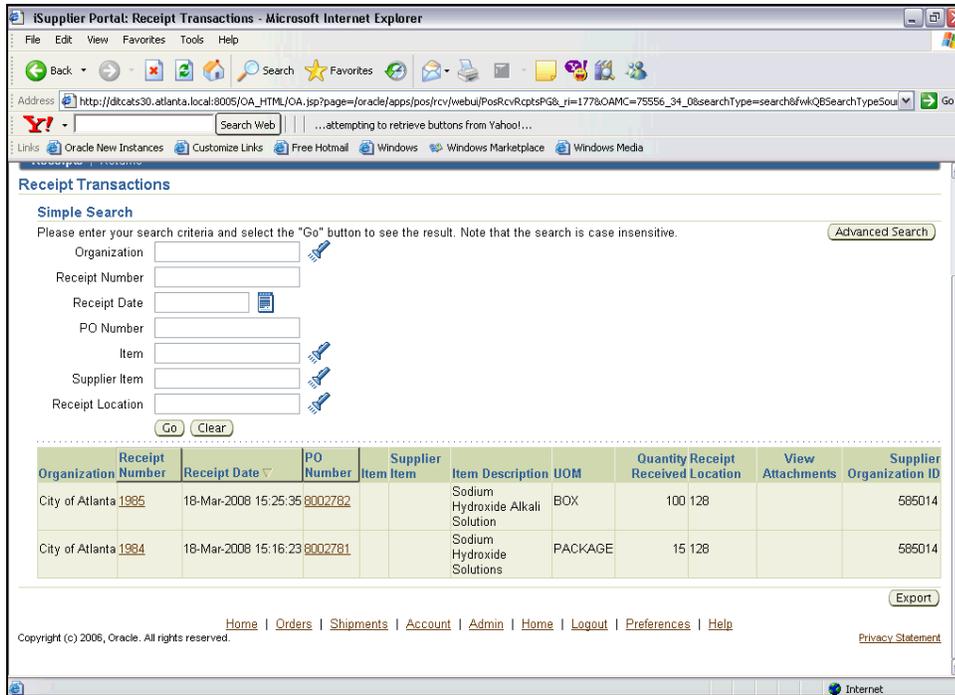
Step	Action
1.	Enter the desired information into the <b>Password</b> field. Enter " <b>welcome1</b> ".
2.	Click the <b>Login</b> button. 



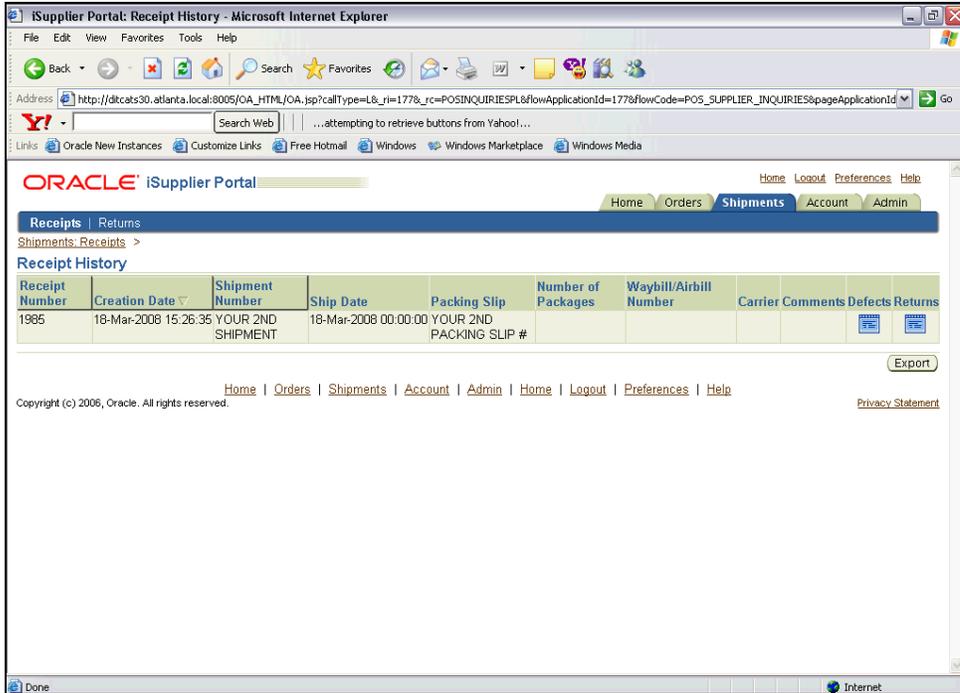
Step	Action
3.	<p>Point to the <b>COA iSupplier 3-Way Vendors</b> object.</p> <p>NOTE: If you are a construction service provider, your Home Page may read "COA iSupplier 2-Way Vendors" instead of "COA iSupplier 3-Way Vendors".</p> <p><a href="#">COA iSupplier 3-Way Vendors</a></p>
4.	<p>Click the <b>COA iSupplier 3-Way Vendors</b> link.</p> <p><a href="#">COA iSupplier 3-Way Vendors</a></p>



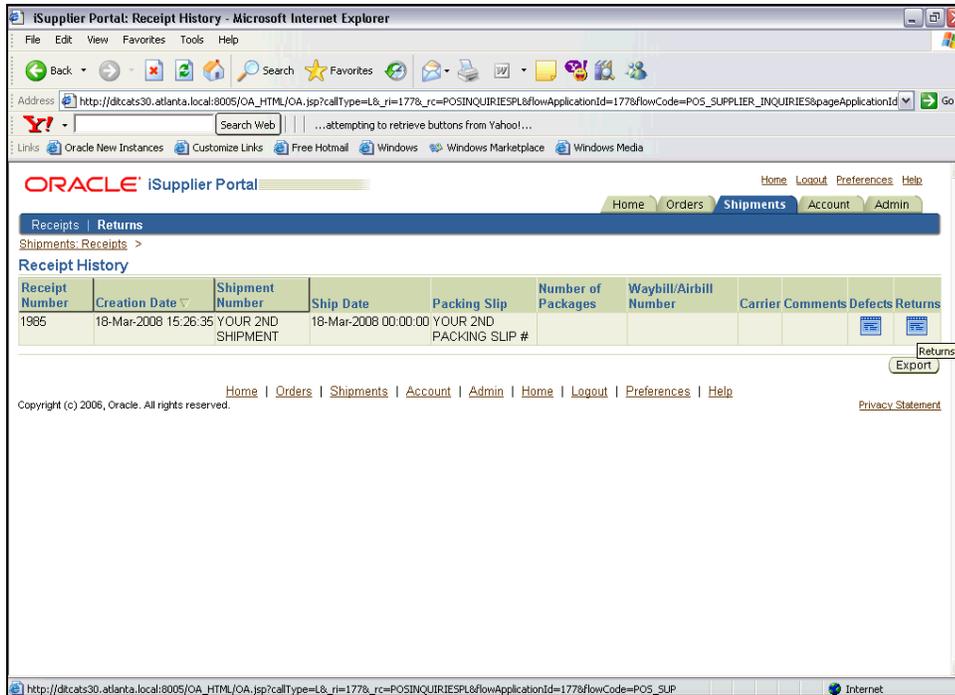
Step	Action
5.	<p>Click the <b>Shipments</b> tab.</p> <p>This is the Order's Home Page.</p> 
6.	<p>Click the <b>Go</b> button.</p> 



Step	Action
7.	<p>Point to the <b>1985</b> object.</p> <p>Click on the receipt number to open the receipt.</p> <p>In our example we open receipt # 1985 and your number may be different.</p> <p><b>1985</b></p>
8.	<p>Click the <b>1985</b> link.</p> <p><b>1985</b></p>



Step	Action		
9.	<p>Point to the <b>Receipt Number</b> object.</p> <p>This page displays the Receipt Details</p> <table border="1"> <tr> <td>1985</td> <td>18-Ma</td> </tr> </table>	1985	18-Ma
1985	18-Ma		



Step	Action
10.	Release the mouse button.  Click on Returns Icon to view the returns.
11.	Point to the <b>Logout</b> object.  This page displays the returned goods details.  Click on Logout Link to Logout.  
12.	<b>End of Procedure.</b>



## Submit on-line invoices

### Submit on-line Invoices

You are a construction service provider if your Homepage reads "COA iSupplier 2-Way Vendors" instead of "COA iSupplier 3-Way Vendors". If you are a construction service provider, you **WILL NOT** be able to use this application to submit your invoice online. Please get in touch with your City contact personnel for detailed payment process.

Only suppliers, who have furnished their Products & Services or who have completed their Phase - II registration process will be eligible to submit invoices online.

Upon successful completion of Phase - II registration process, the City will grant a new "Home Page" with advanced features to the Suppliers.

## Enter Invoices

### *Enter Invoices*

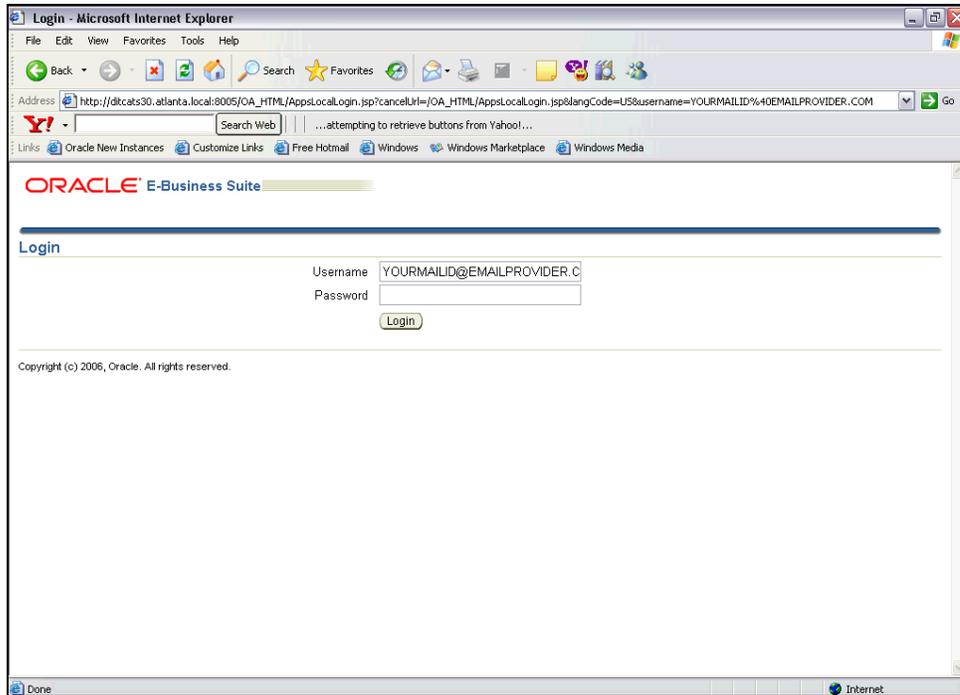
With this application, you may be able to submit your invoices online. In order for the City to process your invoice, the invoiced quantity must have been received by the City. Until the invoiced quantity had been received, the invoice will not be considered for payment. You may be able to monitor your shipments online (as explained in the previous chapter) and find out if the City had received your goods before submitting your invoice.

Your authorized user can then login to City's website to submit an invoice online.

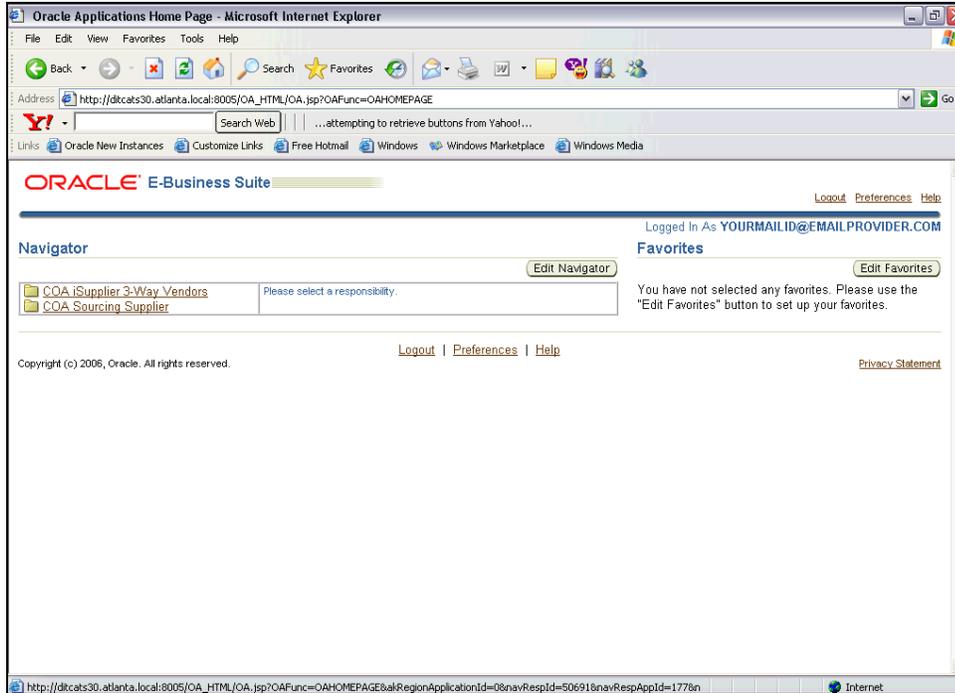
## Procedure

At the end of this exercise, you will be able to

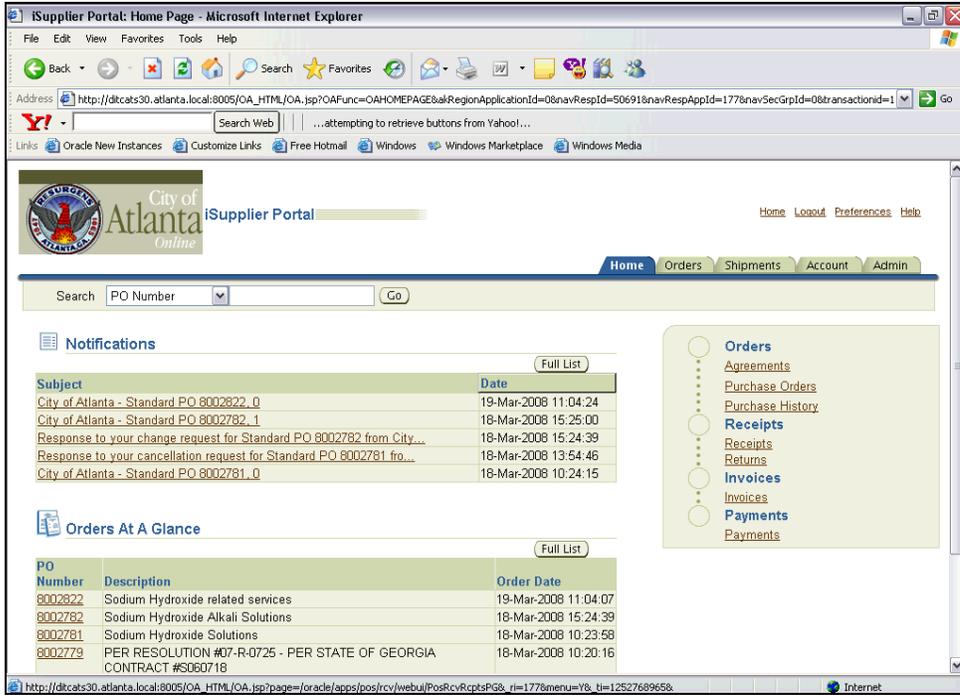
1. Submit invoice by Quantity
2. Submit invoice by Amount.

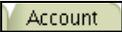


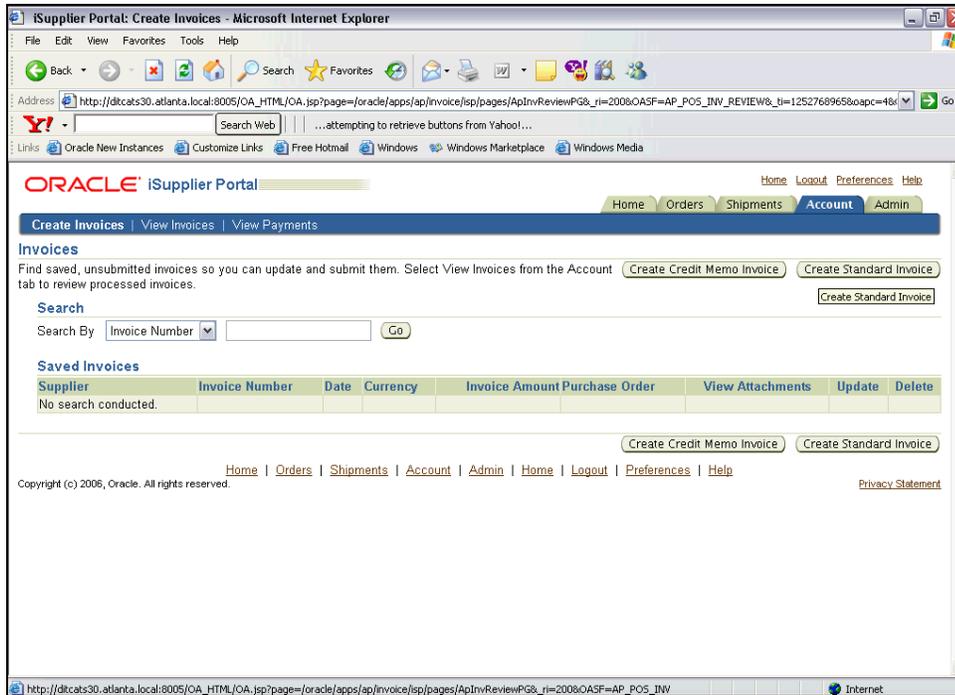
Step	Action
1.	Enter the desired information into the <b>Password</b> field. Enter " <b>welcome1</b> ".
2.	Click the <b>Login</b> button. 



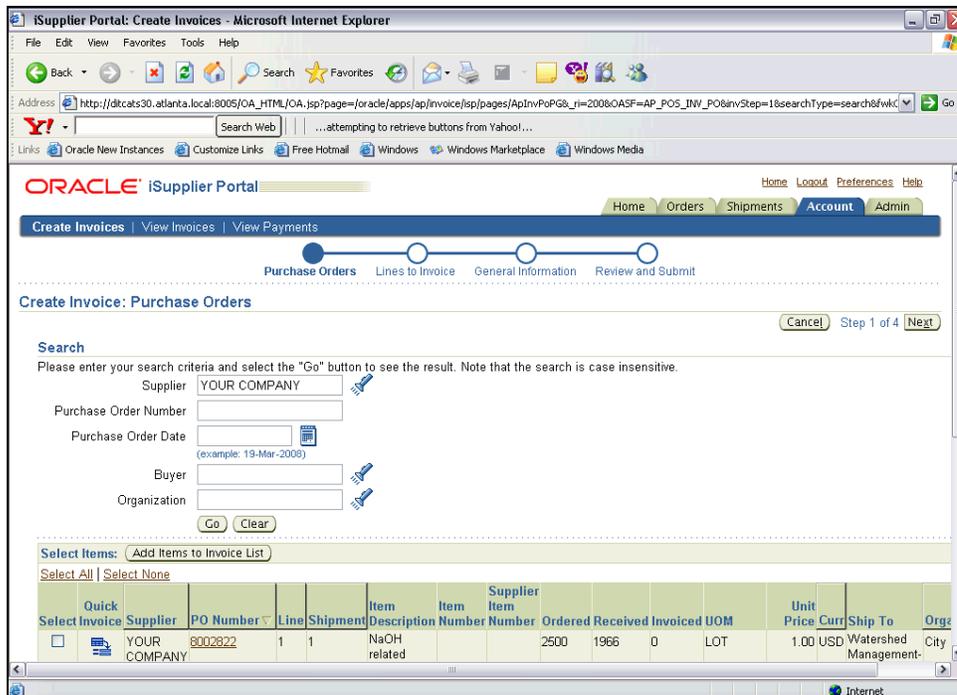
Step	Action
3.	<p>Click the <b>COA iSupplier 3-Way Vendors</b> link.</p> <p>If your Homepage has "COA iSupplier 2-Way Vendors" instead of "COA iSupplier 3-Way Vendors", they you are considered to be a construction service providing vendor. You may not be able to submit your invoices online. Please get in touch with your City contact personnel for additional information.</p> <p>All others, you may proceed with this exercise on how to submit your invoices online.</p> <p><u>COA iSupplier 3-Way Vendors</u></p>



Step	Action
4.	Click the <b>Account</b> tab. 

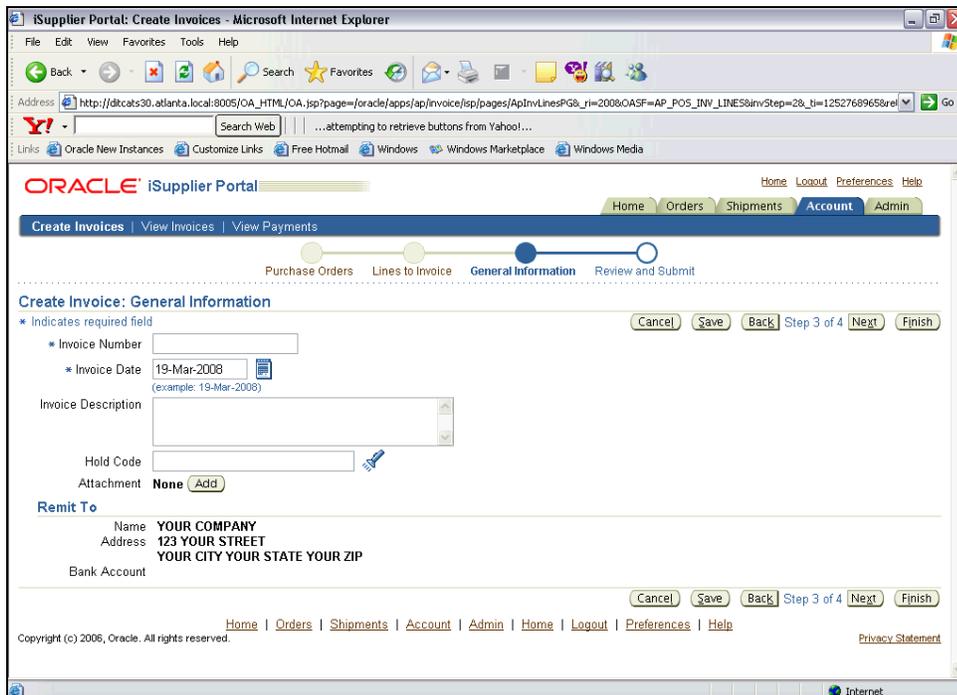


Step	Action
5.	Click the <b>Create Standard Invoice</b> button. 
6.	Enter the desired information into the <b>Search for Supplier</b> field. Enter " <b>YOUR COMPANY</b> ".  <p>The first step in submitting your invoice is to retrieve the associated Purchase Order from the application. Without a valid PO, the application will not allow suppliers to submit their invoices.</p> <p>In this step, we are going to retrieve all your POs by providing the supplier name as a search criteria.</p> <p>To narrow your search results, you may search by providing the exact PO number or date.</p>
7.	Click the <b>Go</b> button.  <p>Clicking the Go button will retrieve all your POs from the application.</p> 

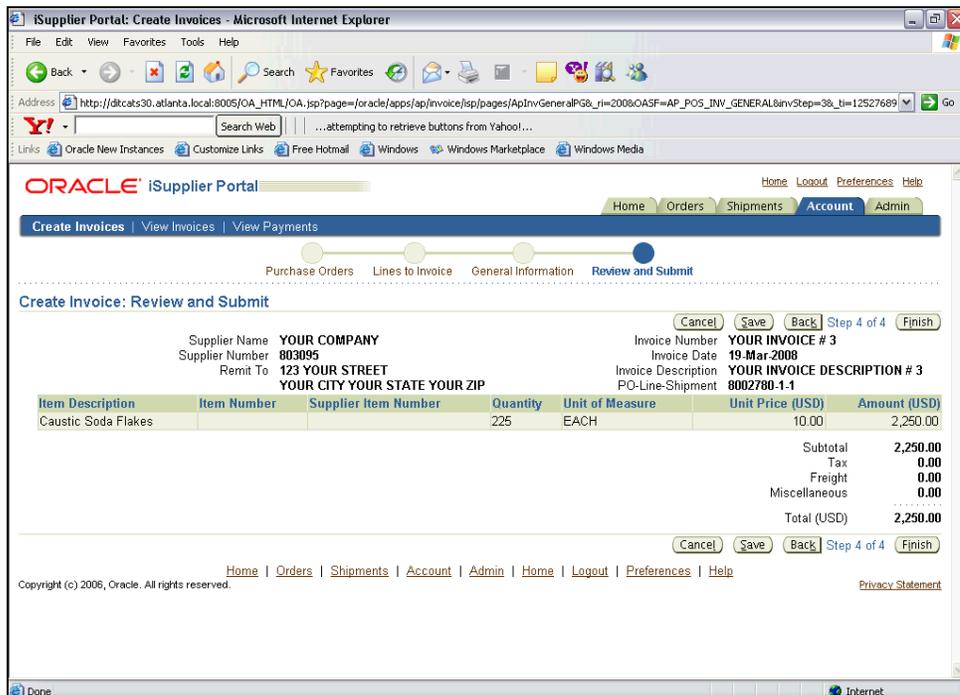


Step	Action
8.	<p>Click the <b>Quick Invoice</b> option.</p> <p>The application has now retrieved all your POs.</p> 
9.	<p>Click the <b>Next</b> button.</p> <p>In this step, we are going to choose the PO line(s) for which we are going to submit our invoice.</p> <p>Please notice the Ordered and Received Quantity columns in the search result area.</p> <p>The application may allow you to submit your invoice for the entire ordered quantity, but unless and until the City receives all the invoiced quantity, your invoice may be processed.</p> <p><b>YOU ARE RESTRICTED TO SUBMIT DIFFERENT INVOICES FOR DIFFERENT PURCHASE ORDERS.</b></p> <p>In other words, each supplier invoice may only contain one PO.</p> <p>In this example, we are going to invoice for PO # 8002780 and we select this by checking the first column check-box.</p> <p>You may then click the Next button to proceed.</p>

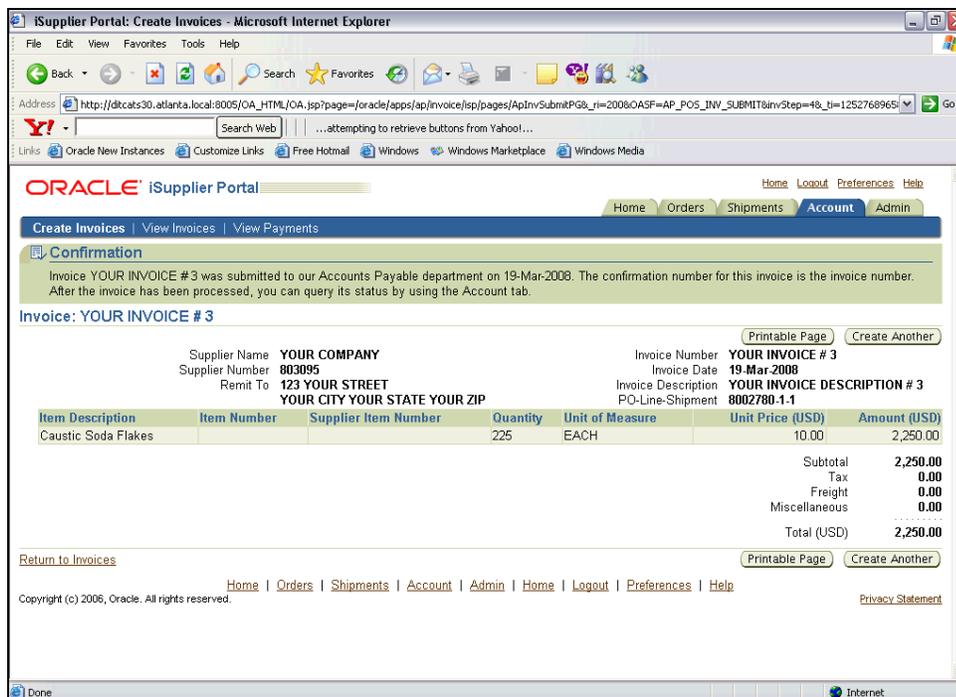
Step	Action
10.	<p>Enter the desired information into the <b>0</b> field. Enter "<b>225</b>".</p> <p>In this step, you are going to enter the Quantity that you are invoicing.</p> <p>In our example, we are invoicing 225.</p>
11.	<p>Click the <b>Next</b> button.</p> <p>If you have other charges like freight and taxes, you may be able to choose the appropriate line charge type under the "Other Charges" section and will be able to enter your amount. For example, if you have taxes on your Invoice, you may add that amount against the line charge type Tax.</p> <p>You may then click the Next Button to proceed.</p> 



Step	Action
12.	<p>Enter the desired information into the <b>Invoice Number</b> field. Enter "<b>YOUR INVOICE # 3</b>".</p> <p>In this step, you are required to enter your Invoice Number, Invoice Date and Invoice Description details.</p> <p>You may want to add the hard-copy of your invoice. You may do so by clicking on the "Attachment Add" button and the following the prompts to upload your scanned hard-copy.</p>
13.	<p>Enter the desired information into the <b>Invoice Description</b> field. Enter "<b>YOUR INVOICE DESCRIPTION # 3</b>".</p>
14.	<p>Click the <b>Next</b> button.</p> 



Step	Action
15.	<p>Click the <b>Finish</b> button.</p> <p>In this step, you may review the invoice you had just generated.</p> <p>If you want to make some changes you may do so by clicking on the Back Button on the top of the page.</p> <p>If you are satisfied with your invoice, you may proceed by clicking on the Finish Button.</p> 



The screenshot shows the Oracle iSupplier Portal interface in a Microsoft Internet Explorer browser window. The page title is "iSupplier Portal: Create Invoices". The navigation menu includes Home, Orders, Shipments, Account, and Admin. The main content area displays a "Confirmation" message for invoice #3, submitted on 19-Mar-2008. Below the message, there is a summary of invoice details and a table of items.

**Invoice: YOUR INVOICE # 3**

Supplier Name: YOUR COMPANY  
 Supplier Number: 803095  
 Remit To: 123 YOUR STREET  
 YOUR CITY YOUR STATE YOUR ZIP

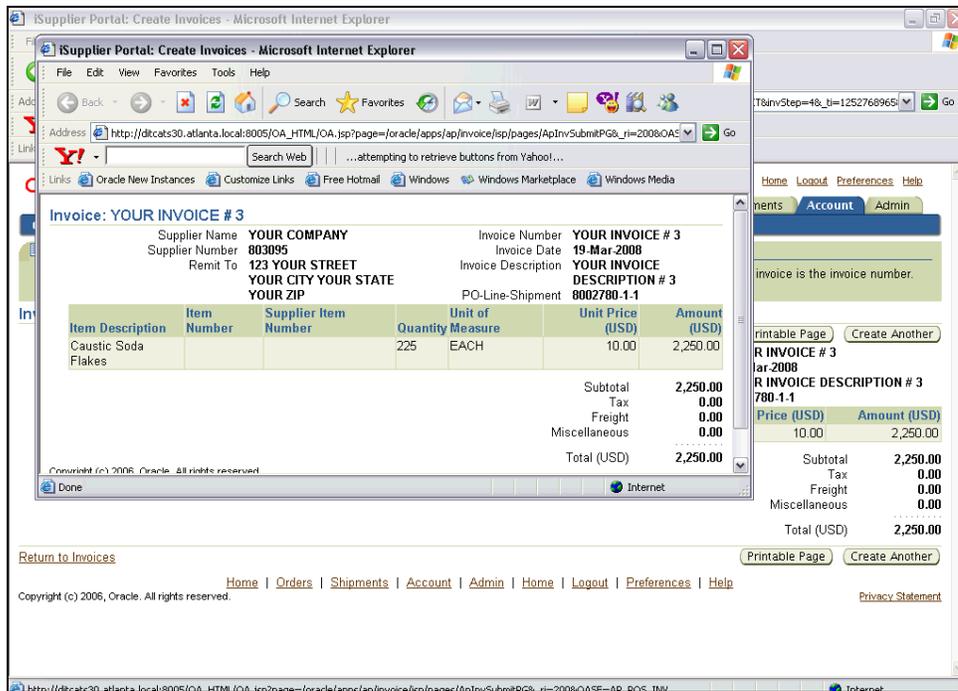
Invoice Number: YOUR INVOICE # 3  
 Invoice Date: 19-Mar-2008  
 Invoice Description: YOUR INVOICE DESCRIPTION # 3  
 PO-Line-Shipments: 8002780-1-1

Item Description	Item Number	Supplier Item Number	Quantity	Unit of Measure	Unit Price (USD)	Amount (USD)
Caustic Soda Flakes			225	EACH	10.00	2,250.00
Subtotal						2,250.00
Tax						0.00
Freight						0.00
Miscellaneous						0.00
Total (USD)						2,250.00

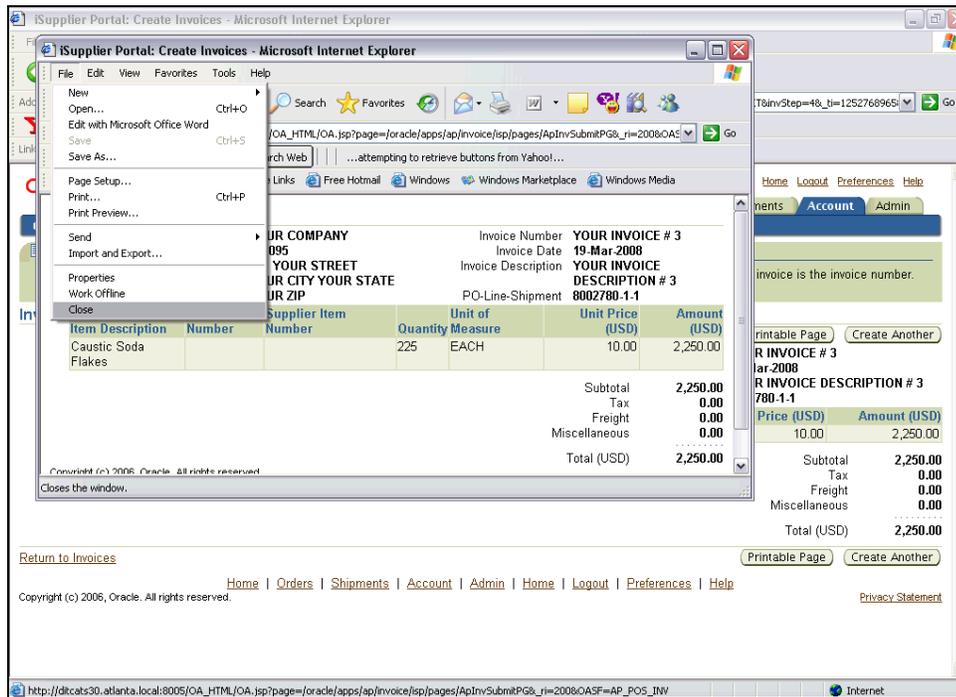
Buttons: Printable Page, Create Another

Footer: Copyright (c) 2006, Oracle. All rights reserved. Privacy Statement

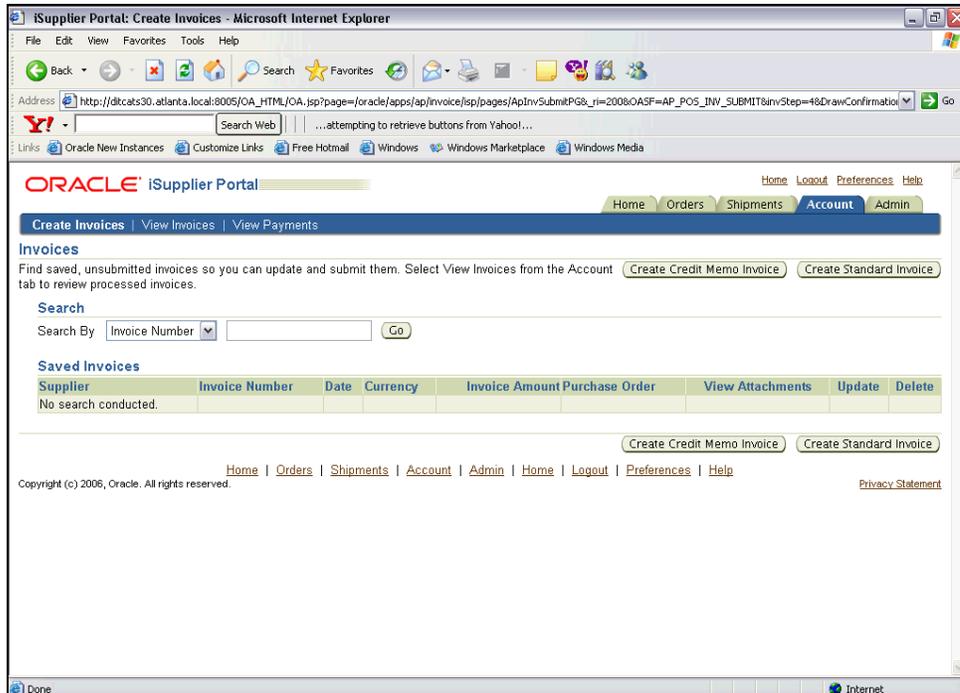
Step	Action
16.	<p>Click the <b>Printable Page</b> button.</p> <p>In this step, you will receive a confirmation message about the successful submission of your invoice. In the confirmation message you may note that, the submitted invoice may not be available for viewing purposes immediately. You may be able to view your invoice only after the City has processed it. Please allow 2-3 business days for the City to process your invoice.</p> <p>For your records you may be able to print the submitted invoice by clicking the Printable Page button.</p> <p></p>



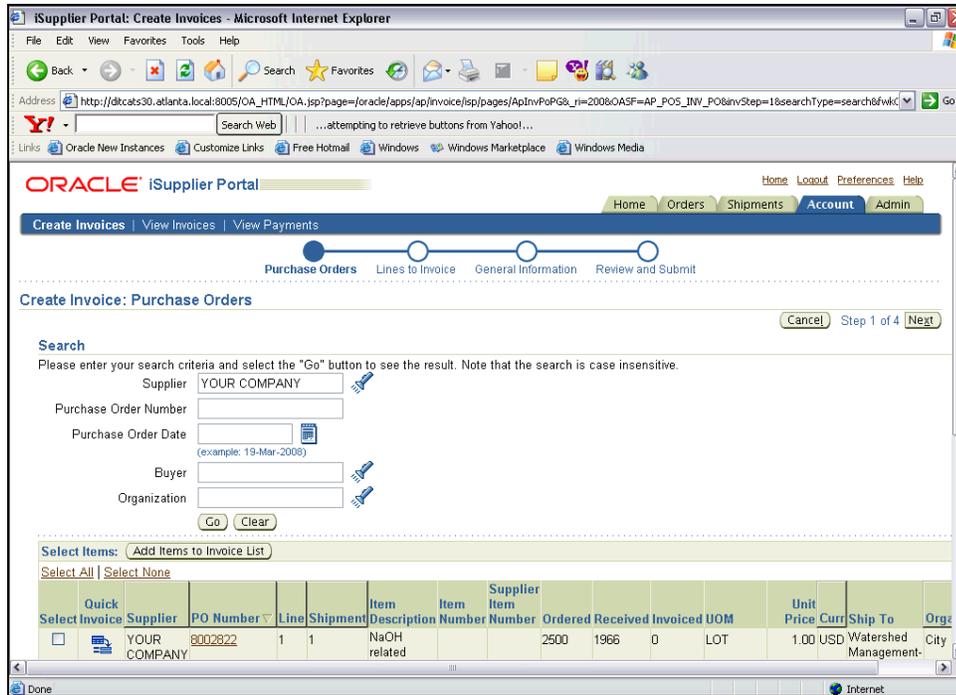
Step	Action
17.	<p>Click the <b>File</b> menu.</p> <p>Clicking Printable Page button, opens up a printable copy of your invoice.</p> <p></p>
18.	<p>Click the <b>File</b> menu.</p> <p>You may print this invoice like you print any other document from your internet browser using File&gt;Print</p> <p></p>



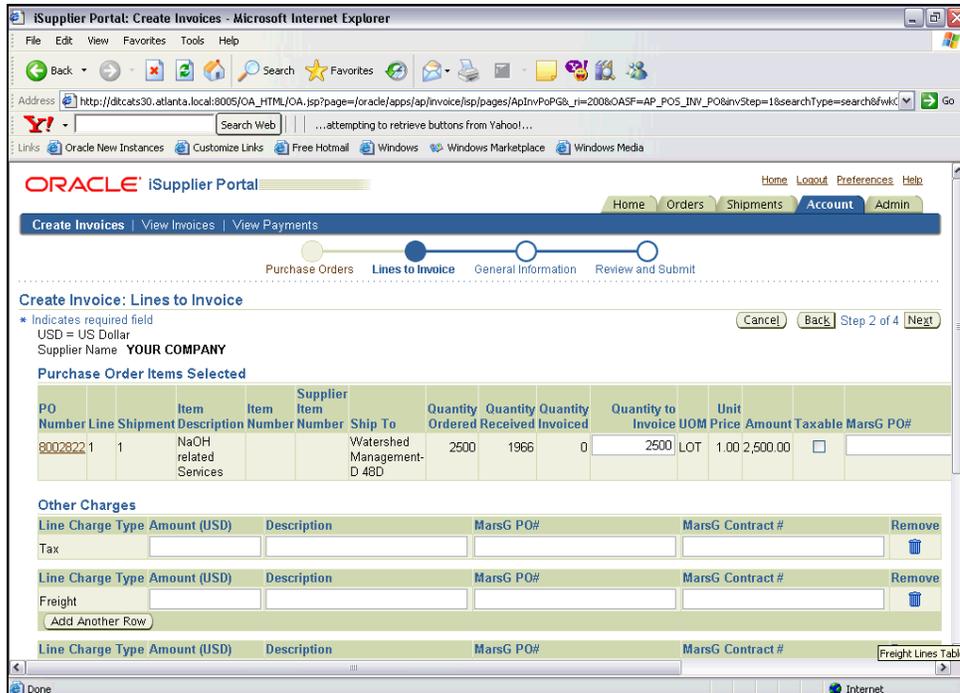
Step	Action
19.	<p>Click the <b>Create Another</b> button.</p> <p>Close the printable page window after printing the document.</p> <p></p>



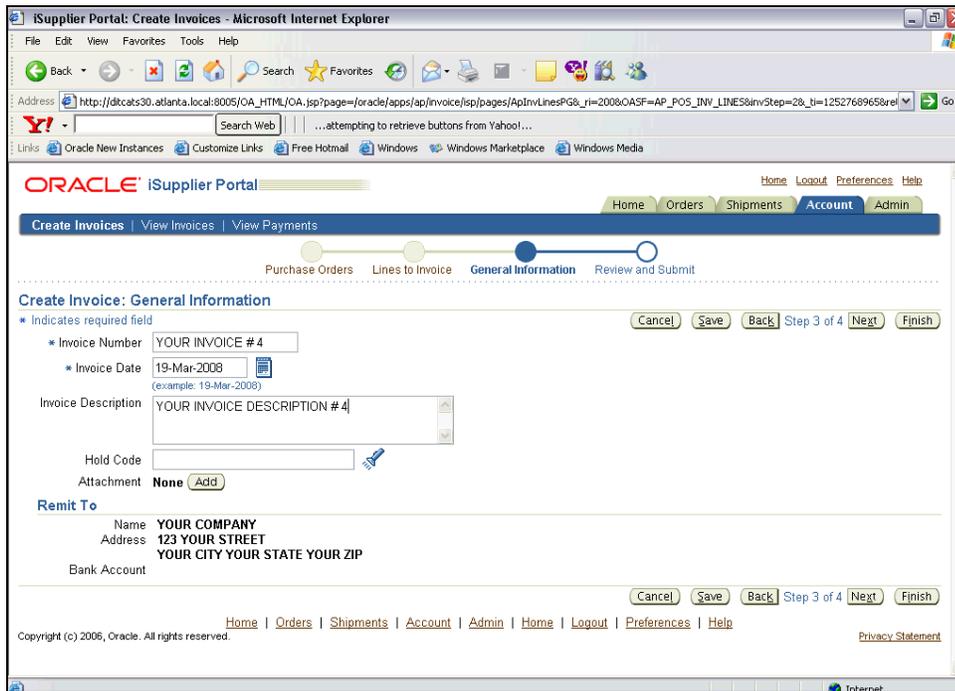
Step	Action
20.	<p>Click the <b>Create Standard Invoice</b> button.</p> <p>In this exercise, we are now going to learn how to submit an invoice that is amount based and not quantity based.</p> <p><input type="button" value="Create Standard Invoice"/></p>
21.	<p>Enter the desired information into the <b>Supplier Name</b> field. Enter "<b>YOUR COMPANY</b>".</p> <p>As we did for submitting quantity based invoice, we are going to retrieve the associated purchase order for this amount based invoice.</p> <p>In this example, we are searching by the supplier name and the application will retrieve all of the supplier's POs.</p> <p>You may narrow down the search result by providing the actual PO number or PO Date as the search criteria and then click on the Go Button.</p>
22.	<p>Click the <b>Search for Organization</b> button.</p> <p>Click on the Go Button to retrieve the supplier POs.</p> <p>Remember, You will not be able to submit your invoice without a proper PO.</p> <p><input type="button" value="Go"/></p>



Step	Action
23.	<p>Click the <b>Quick Invoice</b> option.</p> <p>In this example, we are going to submit our amount based invoice for the PO # 8002822.</p> <input type="checkbox"/>
24.	<p>Click the <b>Next</b> button.</p> <p>After selecting the PO line(s), you may then proceed to the next step by clicking the Next Button.</p> <p><b>YOU ARE RESTRICTED TO SUBMIT DIFFERENT INVOICES FOR DIFFERENT PURCHASE ORDERS.</b></p> <p>In other words, each supplier invoice may only contain one PO.</p> <input type="button" value="Next"/>



Step	Action
25.	<p>Enter the desired information into the <b>1500</b> field. Enter "<b>1500</b>".</p> <p>In this step, you will include the amount invoiced in the "Quantity to Invoice" field.</p> <p>In this example, our Invoice amount is 1500.</p>
26.	<p>Click the <b>Next</b> button.</p> <p>As in the case of submitting quantity based invoices, you may use the Other Charges section to include your taxes and freights.</p> <p>You may click on the Next Button to proceed.</p> <p><b>Next</b></p>
27.	<p>Enter the desired information into the <b>Invoice Number</b> field. Enter "<b>YOUR INVOICE # 4</b>".</p> <p>In this step, we are required to enter Invoice details including Invoice Number, Invoice Date and Invoice Description.</p> <p>You may add any other supporting documents as a file attachment. Please click on the "Add" button on the Attachments field and then follow the prompts to upload your attachment.</p>
28.	<p>Enter the desired information into the <b>Invoice Description</b> field. Enter "<b>YOUR INVOICE DESCRIPTION # 4</b>".</p>



Step	Action
29.	<p>Click the <b>Next</b> button.</p> <p>After entering all the invoicing details, you may click on the Next Button to proceed.</p> <p><input type="button" value="Next"/></p>
30.	<p>Click the <b>Finish</b> button.</p> <p>In this page, you will have the opportunity to review the created invoice.</p> <p>If you are not satisfied with the invoice, you may click on the Back button to take you to the previous steps for re-editing the invoice.</p> <p>Once the invoice is reviewed, you may click on the Finish button to complete the submission of the invoice.</p> <p><input type="button" value="Finish"/></p>

Step	Action
31.	<p>Click the <b>Logout</b> link.</p> <p>Please read the confirmation message carefully.</p> <p>It may be noted that your invoice may not be available for viewing immediately until the City processes this invoice. Please allow 2-3 business days for the City to process your invoice.</p> <p>After processing the invoice, the invoice may be available for viewing and other status inquiry purposes.</p> <p>You may be able to print the submitted invoice by clicking the Printable Page Button.</p> <p></p>
32.	<p>Click on the Logout link to sign-out of the application.</p> <p><b>End of Procedure.</b></p>

## View Invoices

### *View Invoices*

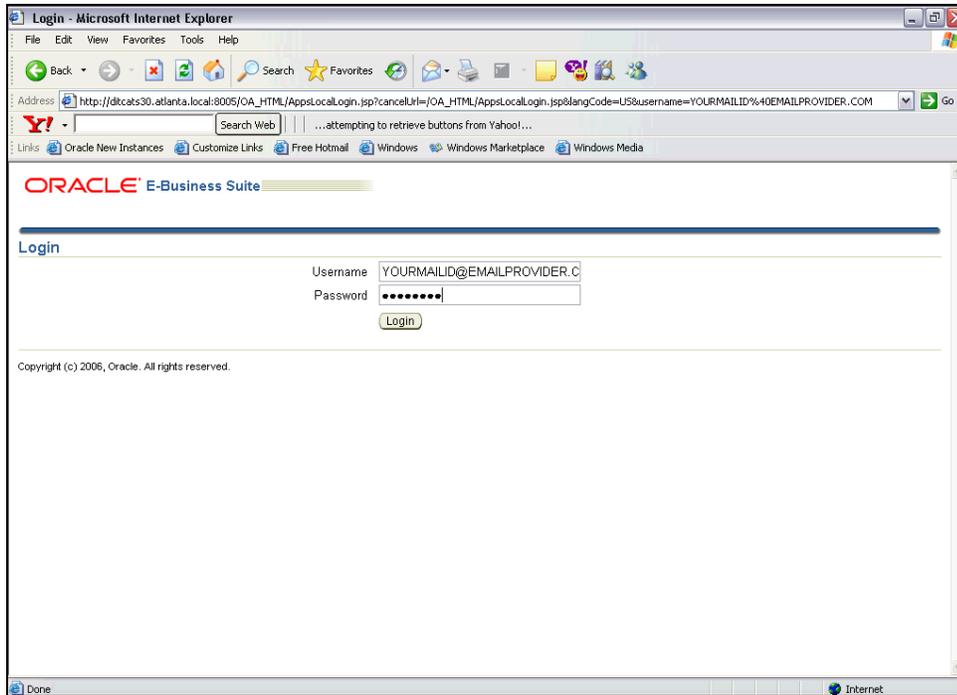
In the last chapter, we learned how to submit an invoice online. In this chapter, we are going to learn how to view an already submitted invoice.

Your authorized user can then login to City's website to review an invoice.

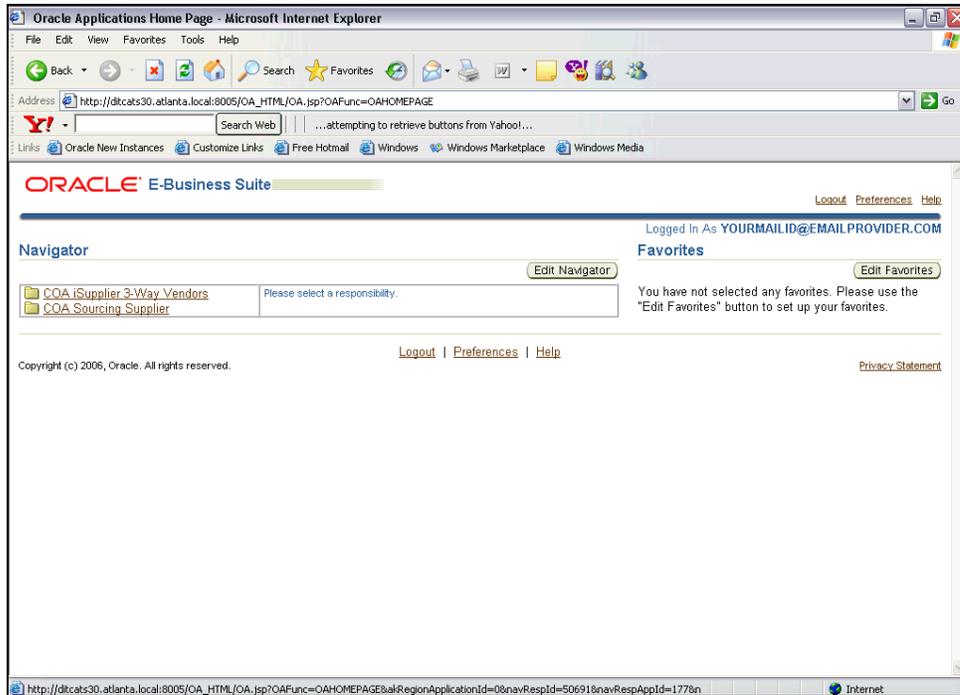
## Procedure

At the end of this exercise, you will be able to review your invoices online.

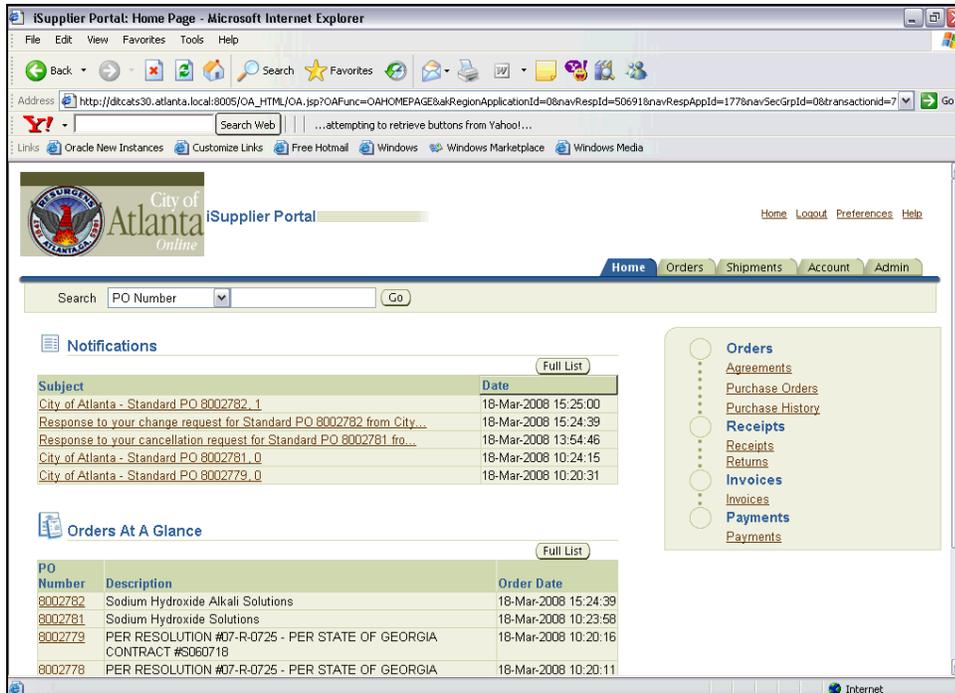
Enter your credentials and click Login.



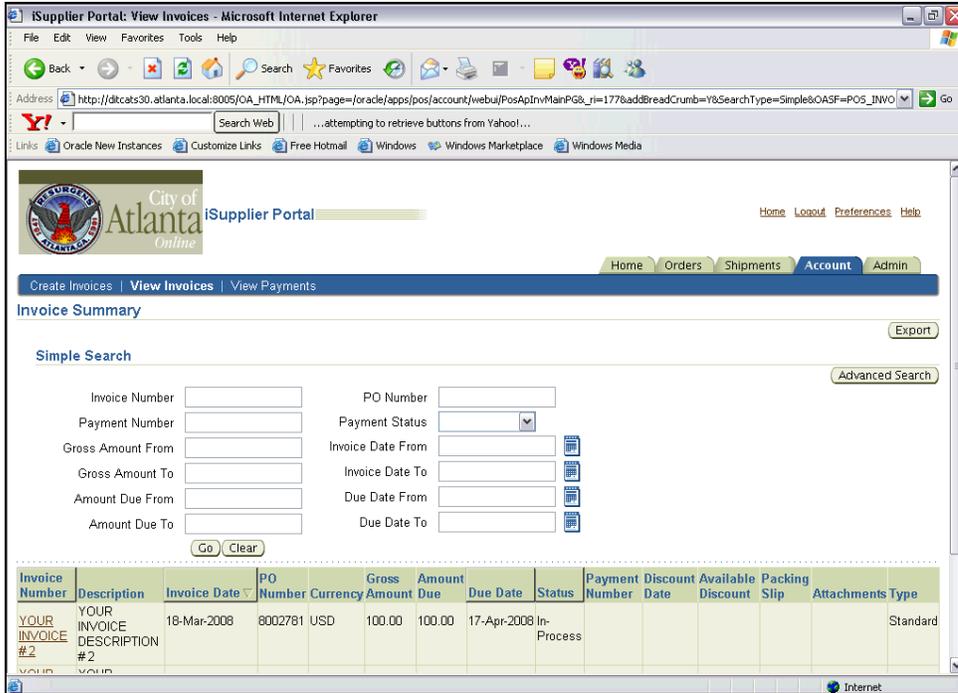
Step	Action
1.	Click the <b>Login</b> button. <input type="button" value="Login"/>



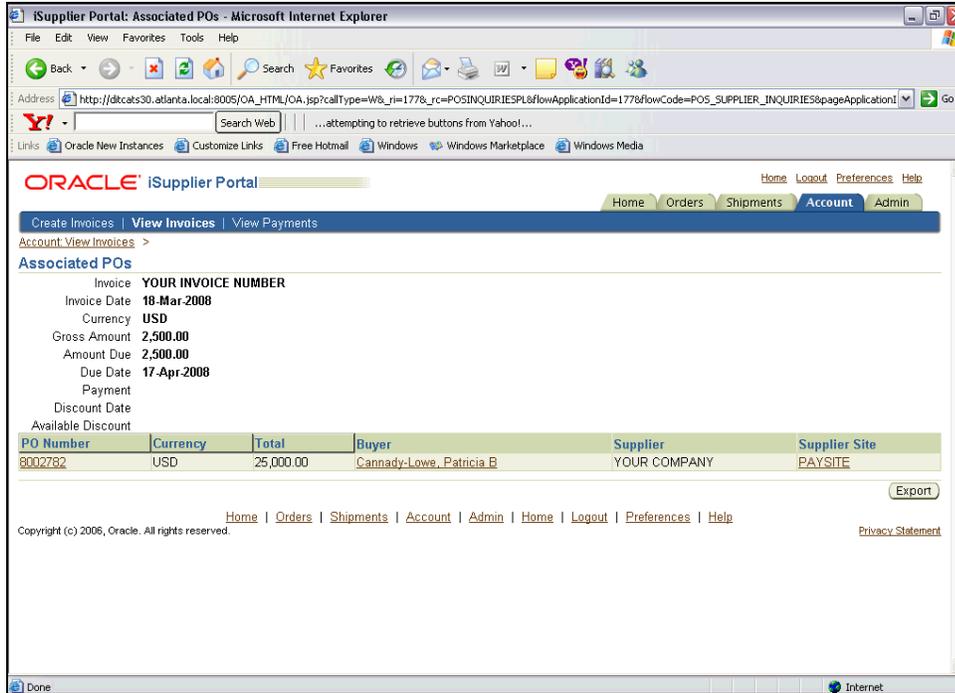
Step	Action
2.	<p>Click the <b>COA iSupplier 3-Way Vendors</b> link.</p> <p>If your Home Page has "COA iSupplier 2-Way Vendors" instead of "COA iSupplier 3-Way Vendors" then you are considered to be a Construction Service providing vendor and you may not be able to submit your invoices online, but you will be able to view your invoices online. You may continue to proceed with this tutorial.</p> <p><u>COA iSupplier 3-Way Vendors</u></p>



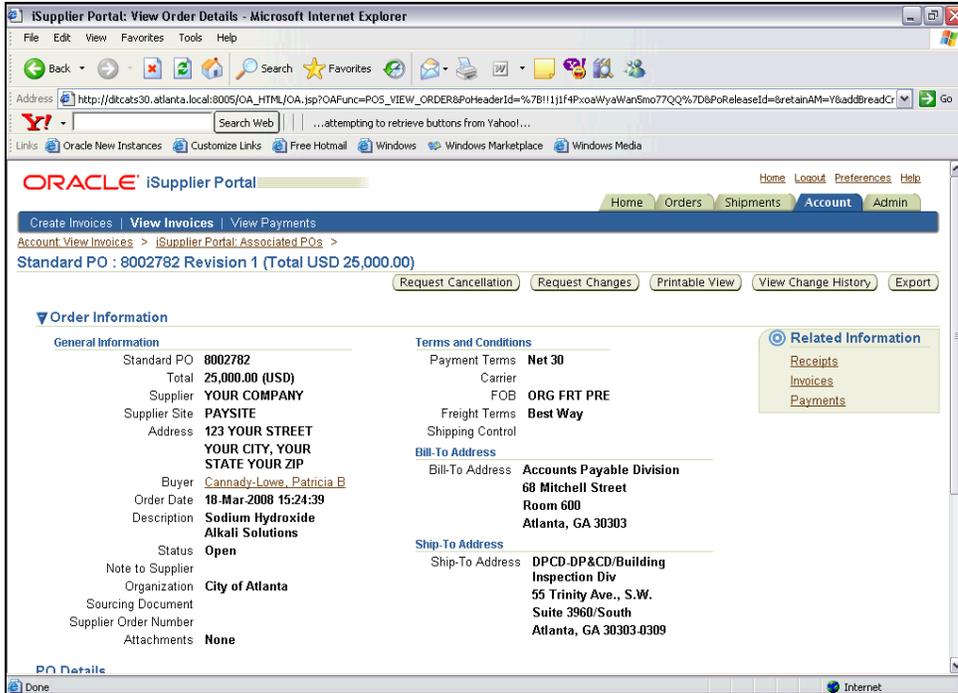
Step	Action
3.	Click the <b>Account</b> tab. 
4.	Click the <b>View Invoices</b> link. 
5.	Click the <b>Go</b> button.  To bring all your invoices, click Go without entering any search criteria.  You can narrow down your search by providing any of the information in the Simple Search area and then Click Go button. 



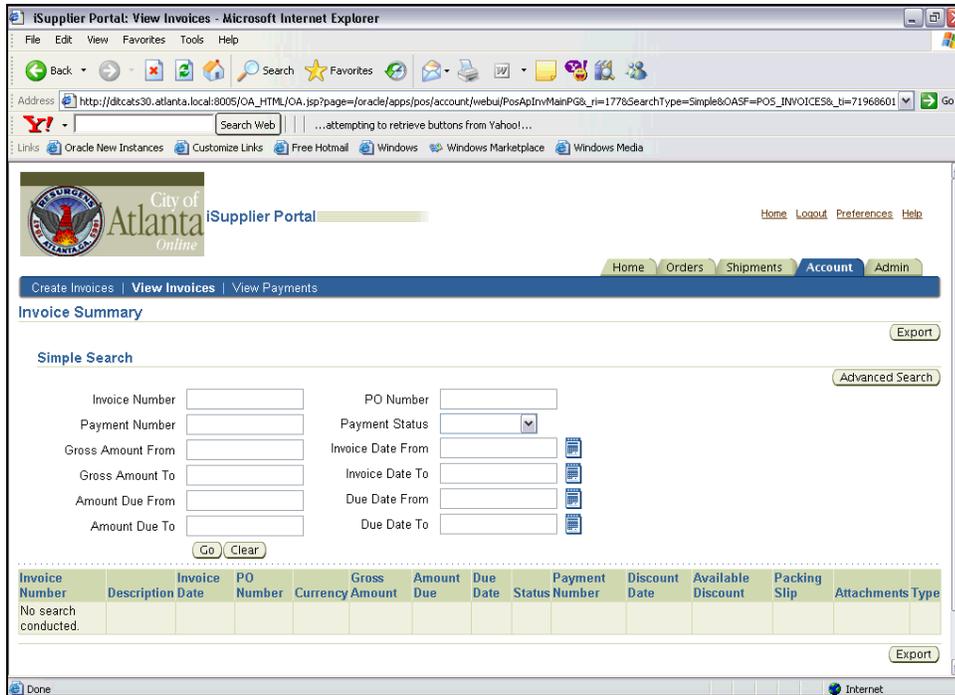
Step	Action
6.	<p>Click the <b>Invoice Number</b> link.</p> <p>We are going to review the invoice that we just entered in our previous exercise.</p> <p>NOTE: Online submitted invoices must have been processed by the City in order for them to appear in this search results.</p> 



Step	Action
7.	<p>Click the <b>8002782</b> link.</p> <p>By clicking the PO Number link, you may be able to review the Purchase Order on the invoice.</p> <p><b>8002782</b></p>



Step	Action
8.	Click the <b>Account: View Invoices</b> link. <a href="#">Account: View Invoices</a>



Step	Action
9.	Click the scrollbar. 
10.	<b>End of Procedure.</b>

## View Payments

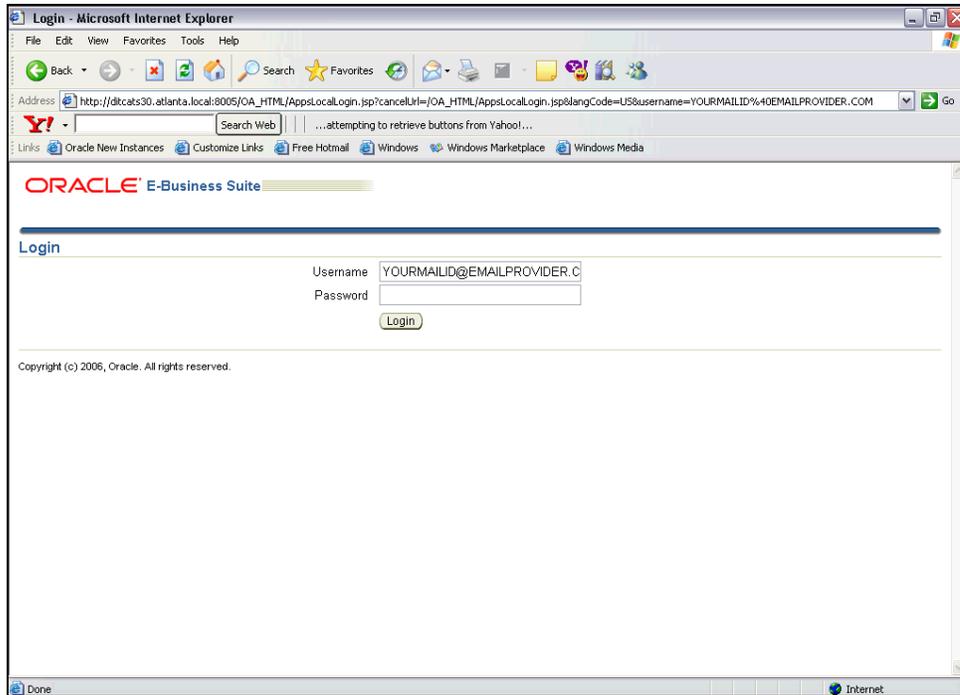
### View Payments

In the last chapter, we learned how to submit and view an invoice online. In this chapter, we are going to learn how to view the payment details for the submitted invoice.

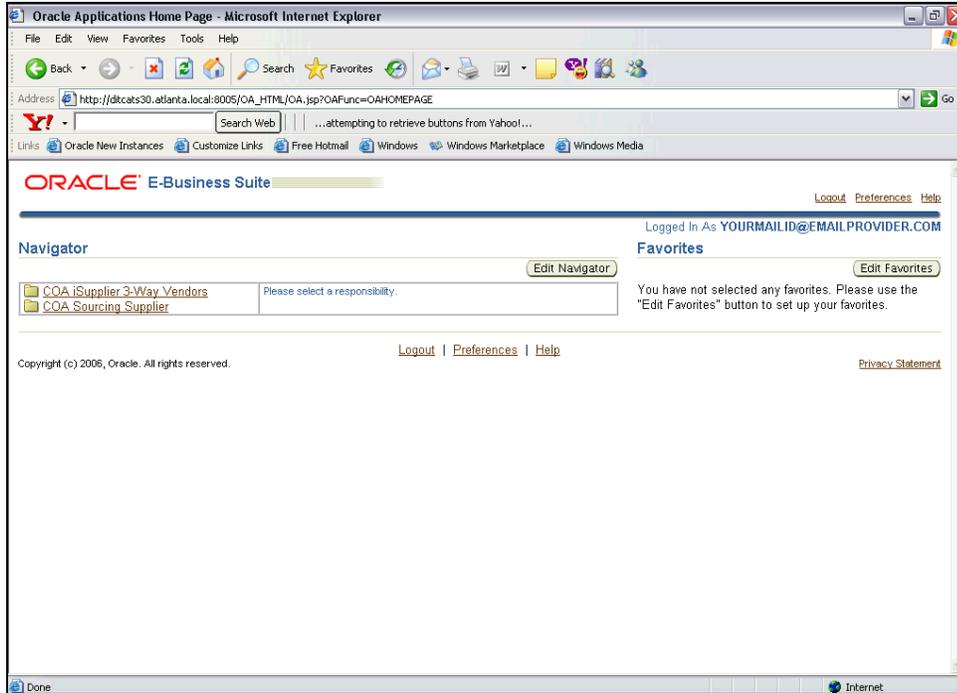
Your authorized user can then login to City's website to review an invoice.

## Procedure

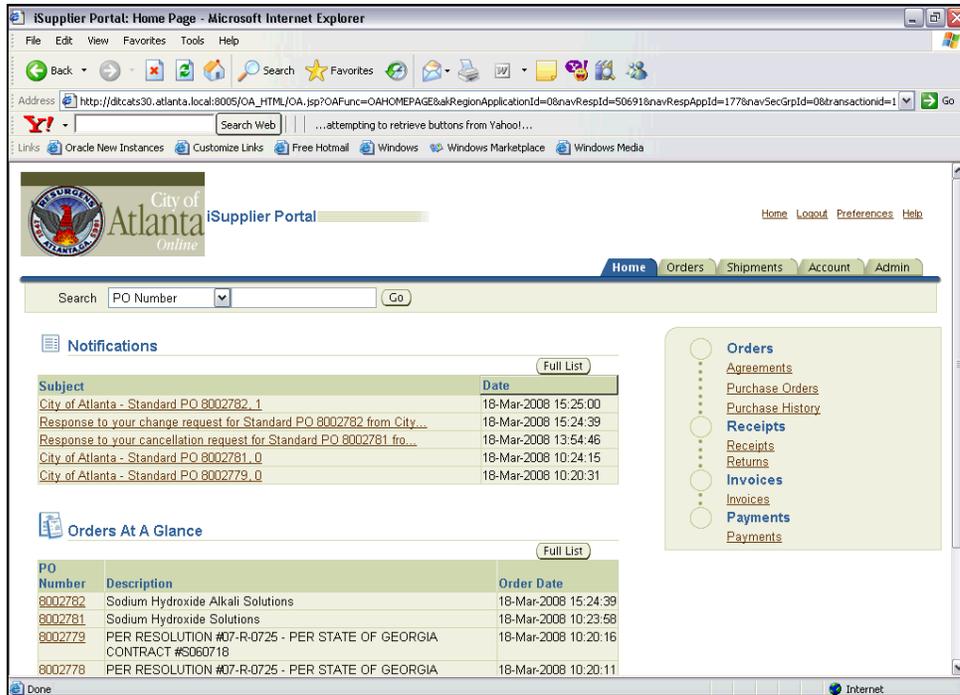
At the end of this exercise, you will learn to review payment details of your invoices.

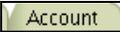


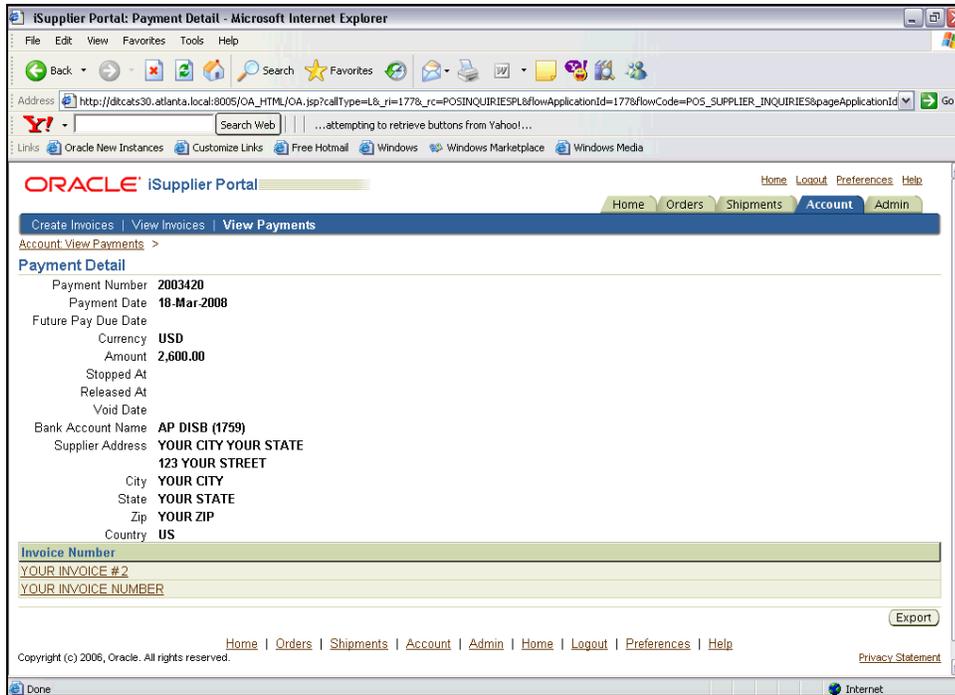
Step	Action
1.	Enter the desired information into the <b>Password</b> field. Enter " <b>welcome1</b> ".
2.	Click the <b>Login</b> button. 



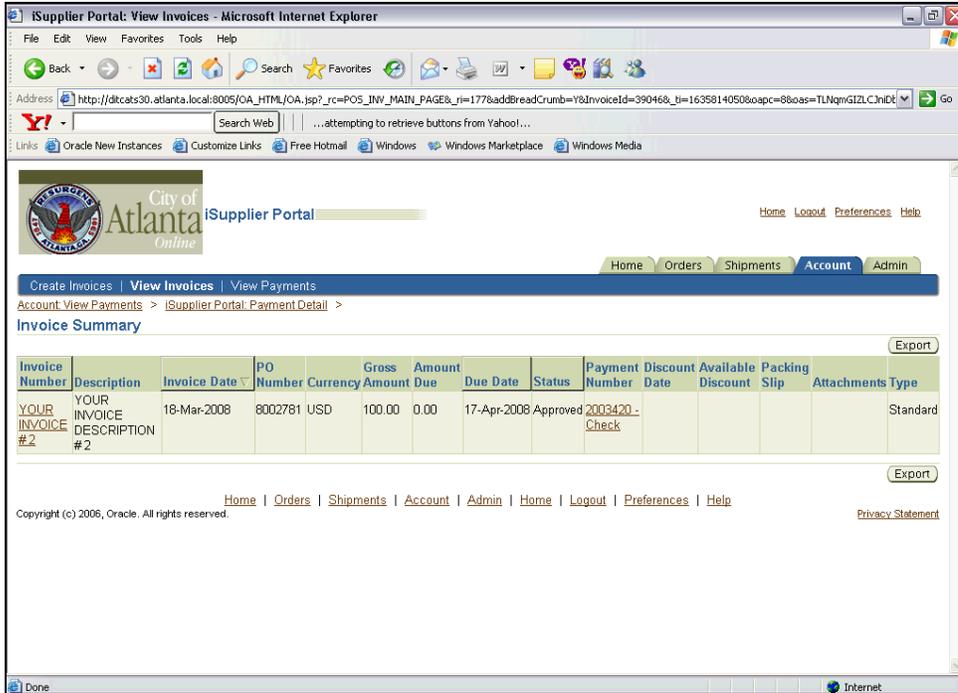
Step	Action
3.	<p>Click the <b>COA iSupplier 3-Way Vendors</b> link.</p> <p>If you are seeing "COA iSupplier 2-Way Vendors" instead of "COA iSupplier 3-Way Vendors" then you may be a construction service provider and you may not be able to submit an invoice online, but you will be able to view the payments online. You may proceed with this exercise.</p> <p><u>COA iSupplier 3-Way Vendors</u></p>



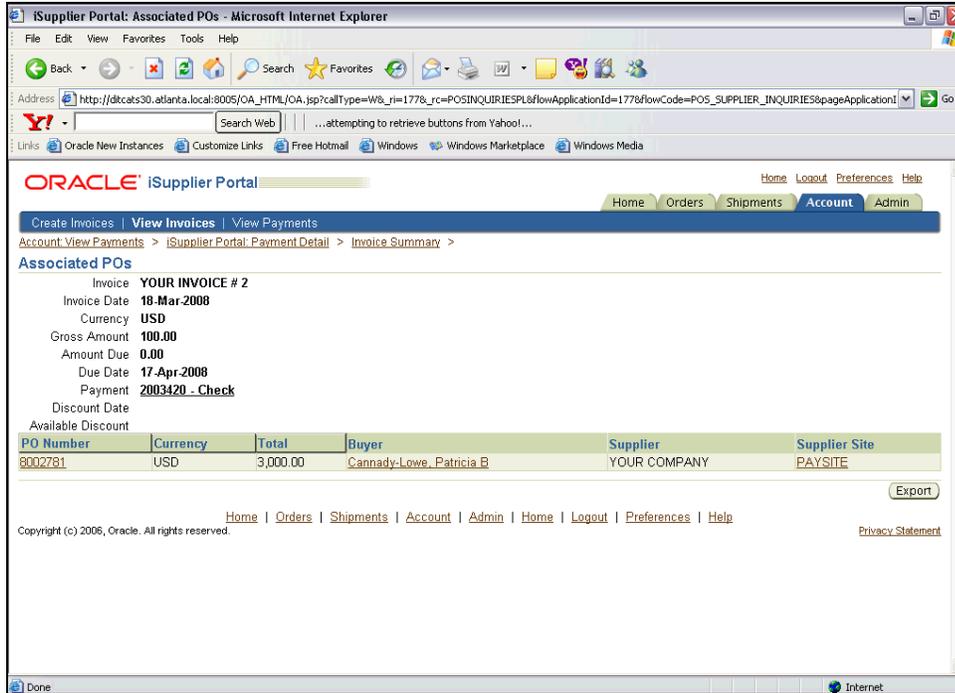
Step	Action
4.	Click the <b>Account</b> tab. 
5.	Click the <b>View Payments</b> link. 
6.	Click the <b>Go</b> button. 
7.	Click the <b>2003420</b> link.  Click on the Payment Number to review the payment details.  In our example, we have chosen, 2003420 Payment number to review. Your payment number may be different. 



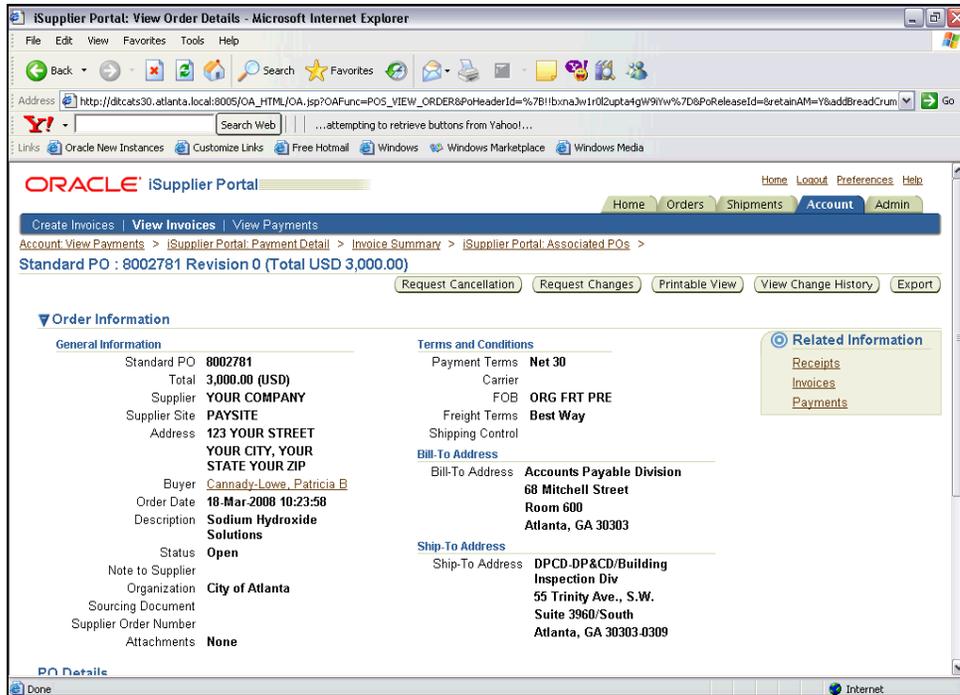
Step	Action
8.	<p>Click the <b>YOUR INVOICE # 2</b> link.</p> <p>Under the Invoice Number section, you may find all the supplier invoices that were paid in that payment batch.</p> <p>You may click on the Invoice number to review that invoice.</p> <p>In this example, we review "YOUR INVOICE # 2" invoice and your invoice number may be different.</p> <p><b>YOUR INVOICE # 2</b></p>



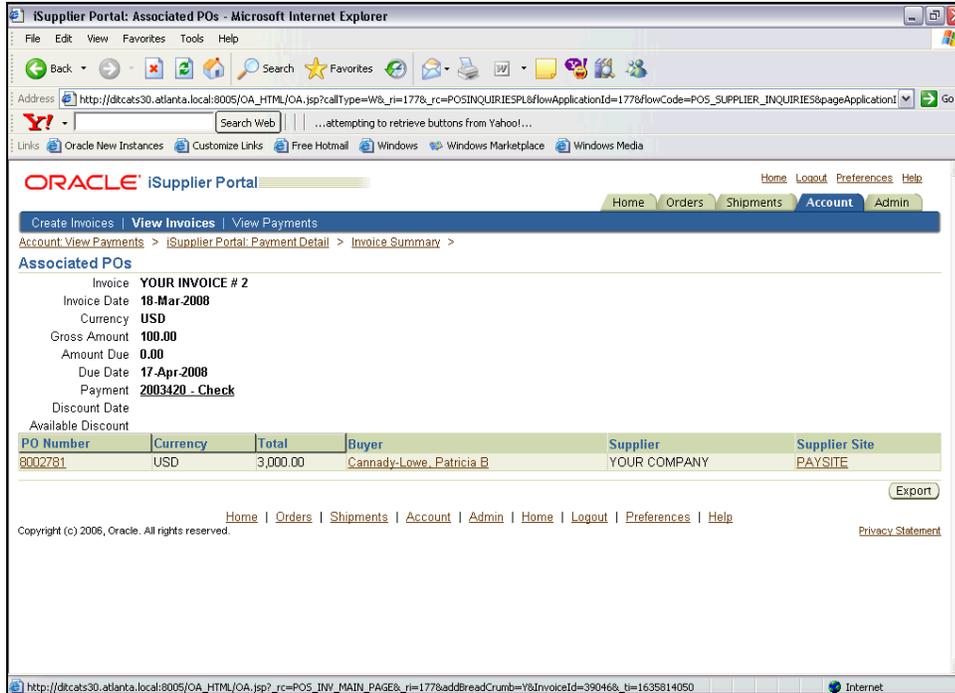
Step	Action
9.	<p>Click the <b>YOUR INVOICE # 2</b> link.</p> <p>You may click on the Invoice Number to get the invoice details.</p> <p>In this example, we click "YOUR INVOICE #2" invoice to review the details.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;"> <p>YOUR INVOICE #2</p> </div>



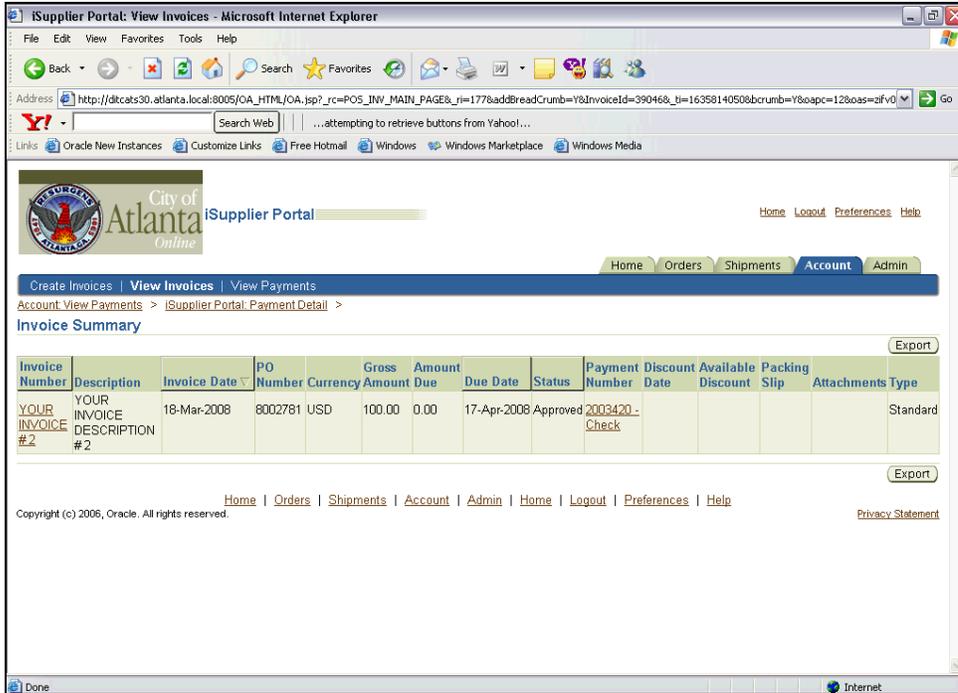
Step	Action
10.	<p>Click the <b>8002781</b> link.</p> <p>From the Invoice, you may be able to drill down to the City's Purchase Order on that Invoice.</p> <p>In our example, our invoice was for the PO # 8002781 and clicking which will open the PO Details. Your PO Number may be different.</p> <p><u>8002781</u></p>



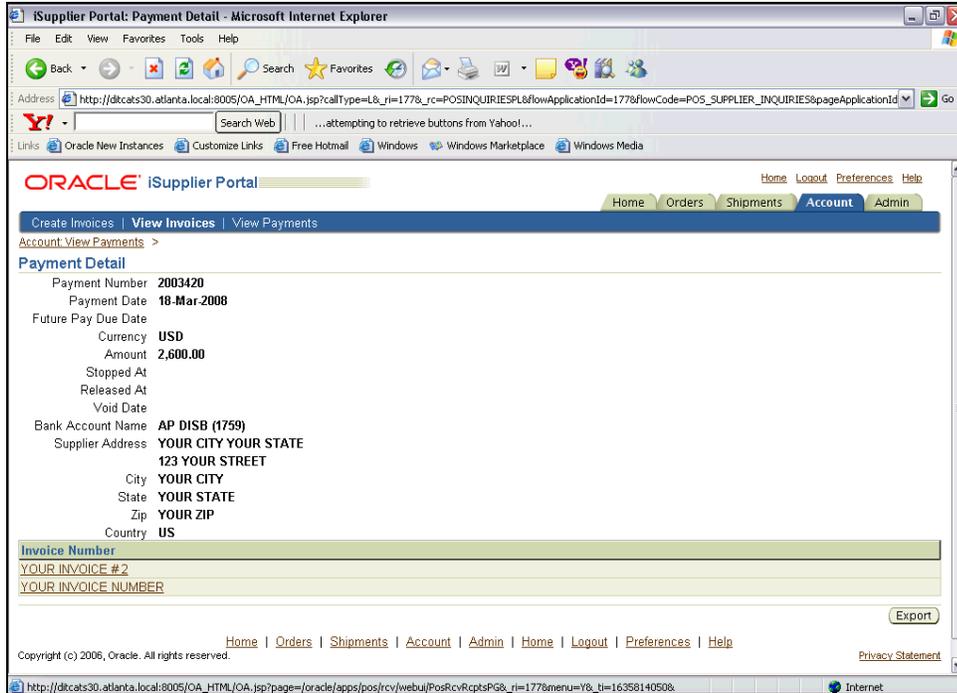
Step	Action
11.	<p>Click the <b>iSupplier Portal: Associated POs</b> link.</p> <p>Having drilled-down from a Check to Invoice Summary to Invoice Details to the PO, we are now going to learn to go back to the payment details.</p> <p>By clicking "Supplier Portal: Associated POs" will take you a page back.</p> <p>Please refrain from using Internet Browser buttons like Back and Forward as the application does not support it.</p> <p>But for every page you navigate to, the previous page's link will be available as shown here and you may use these links to go back.</p> <p><a href="#">iSupplier Portal: Associated POs</a></p>



Step	Action
12.	<p>Click the <b>Invoice Summary</b> link.</p> <p>Clicking Invoice Summary will take you another page back.</p> <p><u>Invoice Summary</u></p>



Step	Action
13.	<p>Click the <b>iSupplier Portal: Payment Detail</b> link.</p> <p>Clicking "Supplier Portal: Payment Detail" will take you another page back.</p> <p><a href="#">iSupplier Portal: Payment Detail</a></p>



Step	Action
14.	<p>Click the <b>Logout</b> link.</p> <p>Now we are back to the Payment Details page.</p> <p></p>
15.	<b>End of Procedure.</b>



## Monitor City's open solicitations

### Monitor City's Open Solicitations

A list of City's current solicitations are available for anyone to preview. You do not have to be a registered supplier to view the list of current solicitations. However, if you want to participate in any of the solicitations, then you will have to register your company with the City, if you have not already done so.

## View City's open solicitation abstracts

### *View City's open solicitation abstracts*

Submit quotes online  
Submit Quotes On-line

Suppliers invited for a solicitation, will receive an e-mail notification from the Sourcing application about their invitation.

If you are a registered supplier with the City already, then you can login to the application and view the solicitation and proceed to acknowledge/respond to the sourcing event.

As a registered supplier, you can respond to any of the City's open solicitation through internet (*with or without an invitation from the City for a solicitation*). Suppliers can view the list of current solicitations from the "City's open solicitations abstracts" page and can choose the solicitation that fits their company's profile to respond to.

## How to acknowledge participation?

### *How to acknowledge participation?*

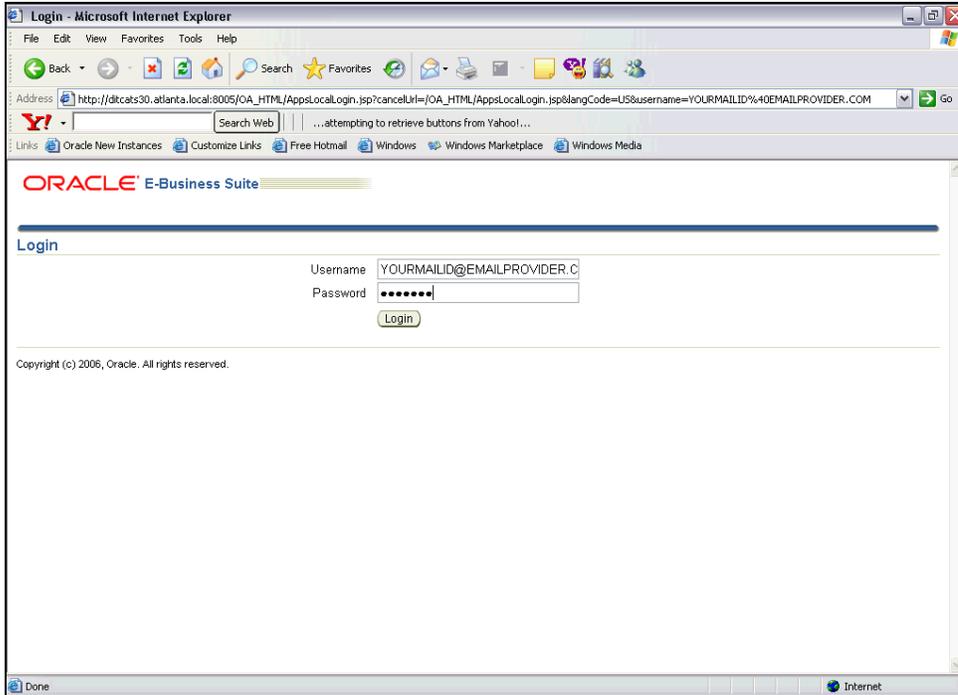
By the end of this exercise, you will learn to let the City know your intent to participate for a sourcing event..

## Procedure

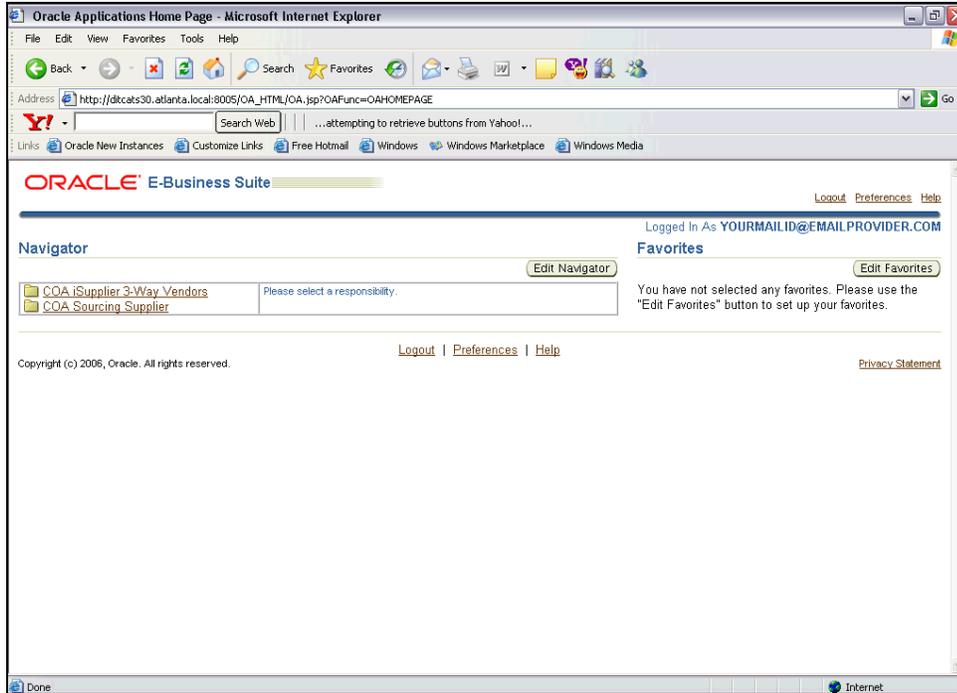
By the end of this exercise, you will learn two different ways of acknowledging a solicitation.

Everytime when the City invites you for its solicitation, you will be sent an automated email message from the application titled:  
"You are invited".

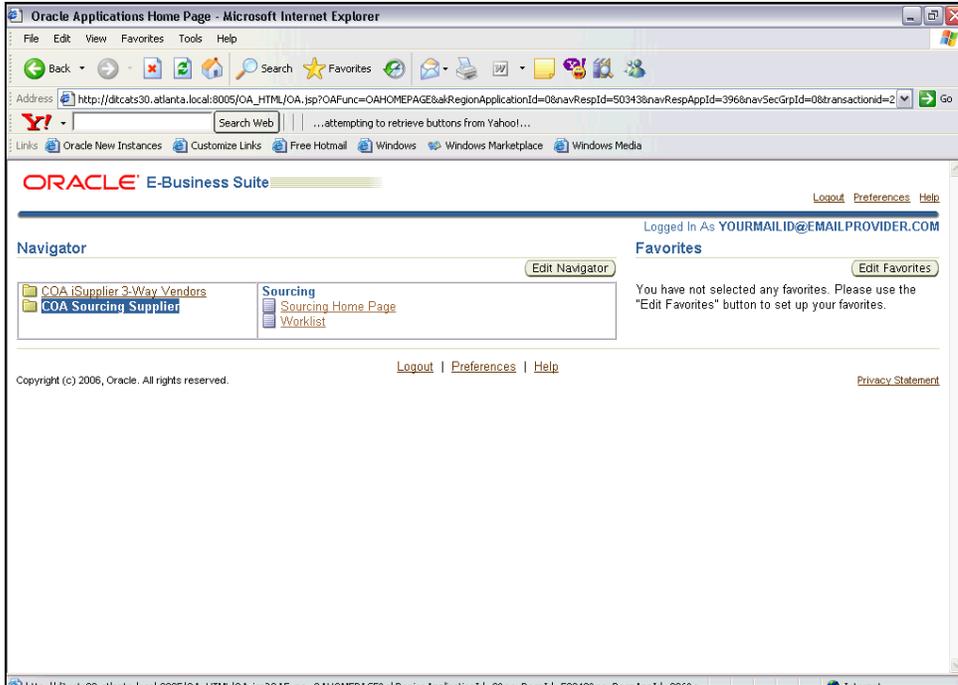
You may then proceed to acknowledge your intent to participate.



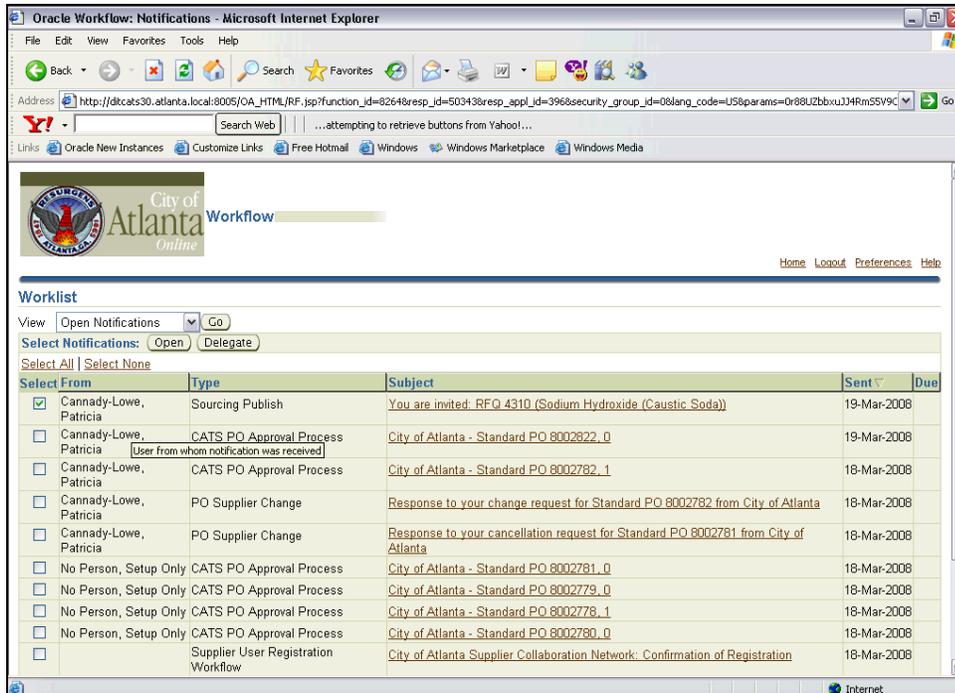
Step	Action
1.	<p>Click the <b>Login</b> button.</p> <p>Please refer to "Login to iSupplier Portal" topic for detailed instructions on how to login to the application.</p> <p></p>



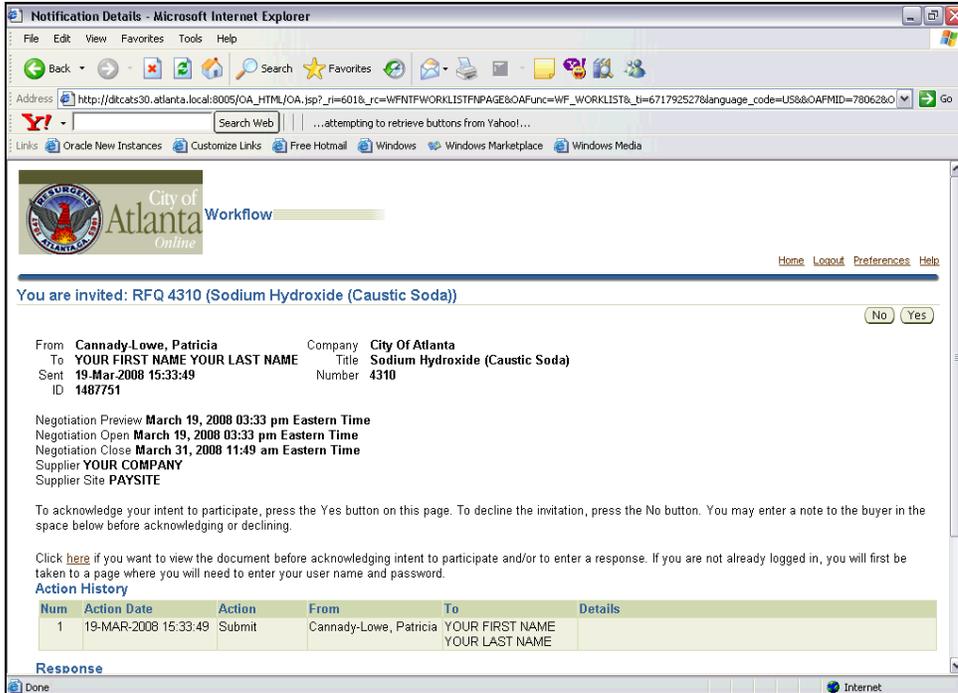
Step	Action
2.	<p>Point to the <b>COA Sourcing Supplier</b> object.</p> <p>This is your Homepage.</p> <p>If your homepage looks totally different, then you may not have completed your Phase - II registration process. Please refer to the previous chapters for detailed instructions regarding Phase - II registration.</p> <p>We are now going to click "COA Sourcing Supplier"</p> <p><u>COA Sourcing Supplier</u></p>
3.	<p>Click the <b>COA Sourcing Supplier</b> link.</p> <p><u>COA Sourcing Supplier</u></p>



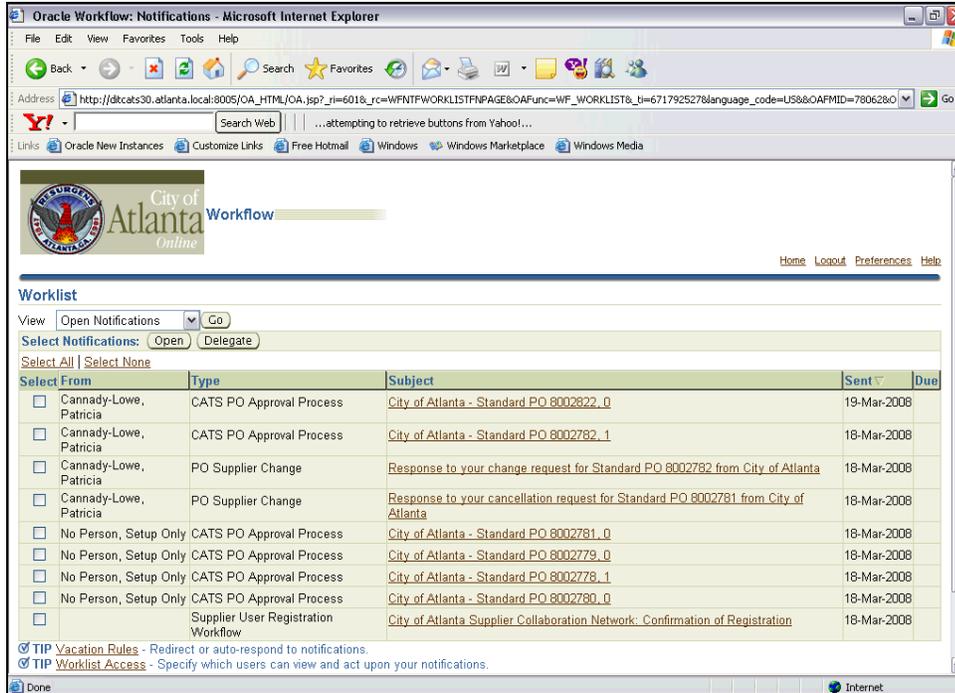
Step	Action
4.	<p>Point to the <b>Worklist</b> object.</p> <p>We are going to learn to acknowledge participation through worklist.</p> <p>Worklist - This is your City's email inbox. In this you may find all the notifications sent to you by the application.</p> <p>In this inbox, you will find the "You are invited:" email as well.</p> <p><a href="#">Worklist</a></p>
5.	<p>Click the <b>Worklist</b> link.</p> <p>Let us click on the Worklist to see what it contains.</p> <p><a href="#">Worklist</a></p>



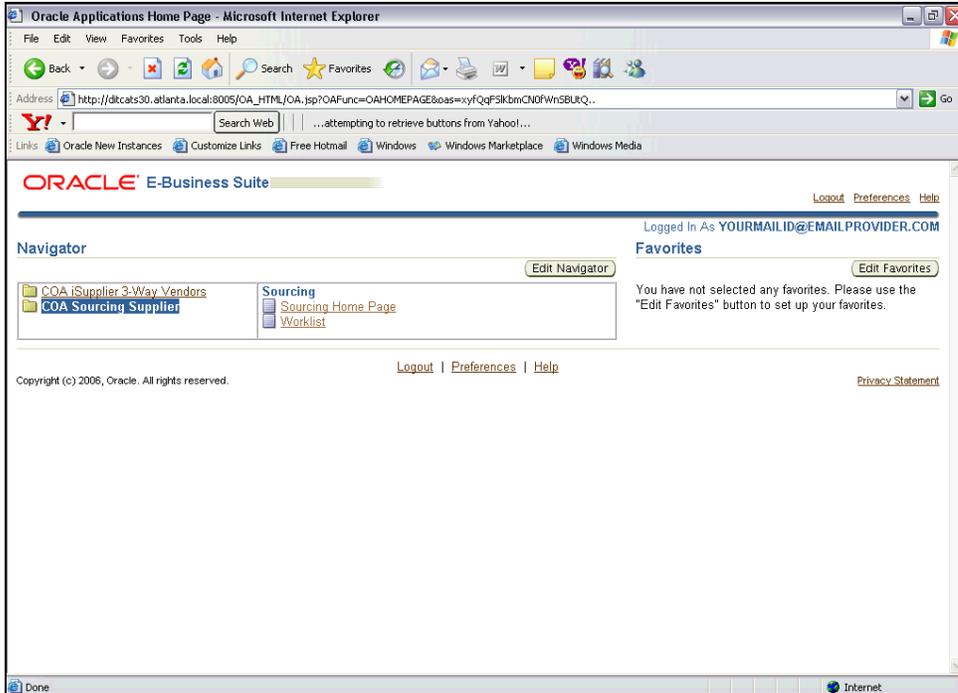
Step	Action
6.	<p>Point to the <b>Open</b> object.</p> <p>As you may have observed, all emails generated by the application and addressed to you are stored in this inbox.</p> <p>In order for you to open a message, you must check the select box of the message that you are trying to open and click on the Open Button on the top of the page.</p> <p>You may also click the Subject to open the message directly.</p> <p><input type="button" value="Open"/></p>
7.	<p>Click the <b>Open</b> button.</p> <p><input type="button" value="Open"/></p>



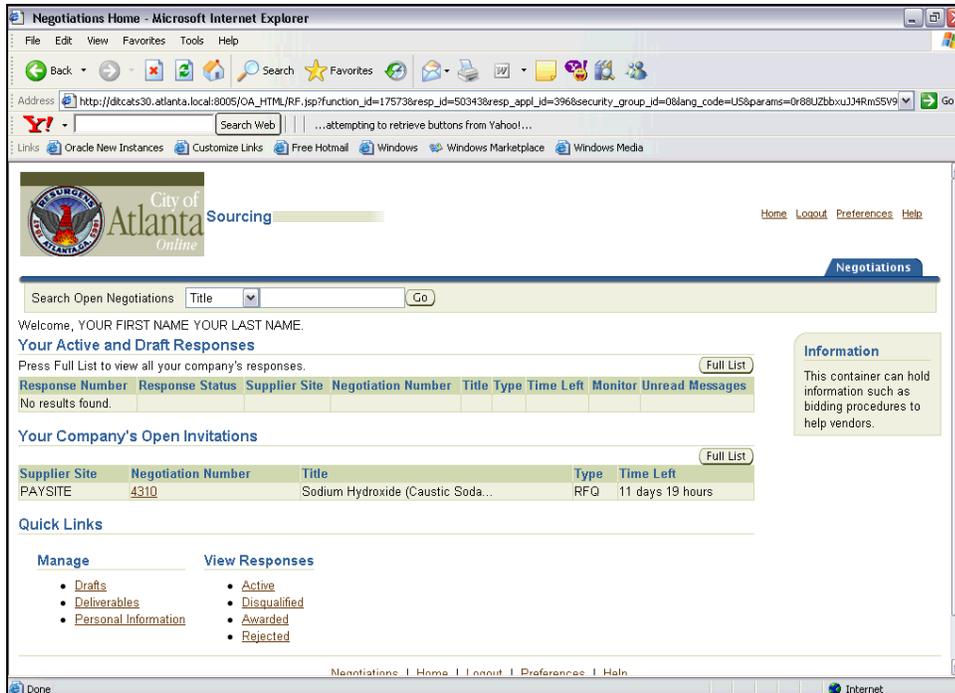
Step	Action
8.	<p>Release the mouse button.</p> <p>You may have received this exact same delivered to your email.</p> <p>Here you have the option of letting the City know about your intent to participate.</p> <p>Please read the email carefully before proceeding to acknowledge.</p>
9.	<p>Click the <b>Yes</b> button.</p> <p>In this example, we are going to indicate that we are going to participate.</p> <p><input type="button" value="Yes"/></p>



Step	Action
10.	<p>Click the <b>Home</b> link.</p> <p>From anywhere in the application, you may click on the Home button to take you to the Homepage.</p> <p></p>

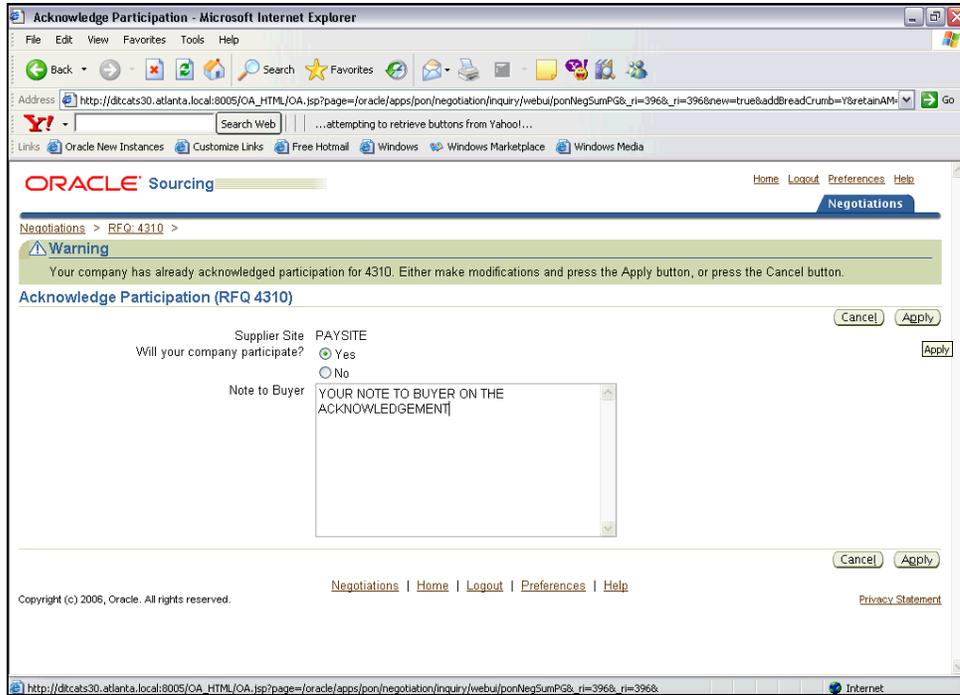


Step	Action
11.	<p>Click the <b>Sourcing Home Page</b> link.</p> <p>We are now going to learn the second way of acknowledging the solicitation.</p> <p><a href="#">Sourcing Home Page</a></p>



Step	Action
12.	<p>Point to the <b>4310</b> object.</p> <p>Let us take a brief moment to explore this Sourcing Home Page.</p> <p>The first section is "Your Active and Draft responses". In this section you may find all your responses that are active or in progress. Currently this section is empty.</p> <p>Under this section, we have "Your Company's Open invitation. In this section you may find the current Solicitation that we are trying to acknowledge.</p> <p>In the bottom of the page, you will find the "Quick Links" section. In this section you will have shortcuts to many of the often used features.</p> <p><b>4310</b></p>
13.	<p>Click the <b>4310</b> link.</p> <p>You can click on the Negotiation Number to open.</p> <p><b>4310</b></p>
14.	<p>Click the <b>Go</b> button.</p> <p>You may click on any of the links to get more details.</p> <p>But for now we are going to let the City know of our Intent to Participate.</p> <p><b>Go</b></p>

Step	Action
15.	<p>Enter the desired information into the <b>Note to Buyer</b> field. Enter "<b>YOUR NOTE TO BUYER ON THE ACKNOWLEDGEMENT</b>".</p> <p>On the top of the page, you may notice the warning suggesting that we had already acknowledged this.</p>



Step	Action
16.	<p>Click the <b>Apply</b> button.</p> <p><input type="button" value="Apply"/></p>
17.	<b>End of Procedure.</b>

## **How to view an RFQ/RFI**

### *How to view an RFQ/RFI?*

By the end of this exercise, you will learn to review a negotiation document.

The following topics are covered:

1. Review Headers
2. Download File Attachments.
3. Print RFQ
4. Review Lines
5. Review Controls
6. Review Contract Terms.
7. Review Amendments
8. Acknowledge Amendments

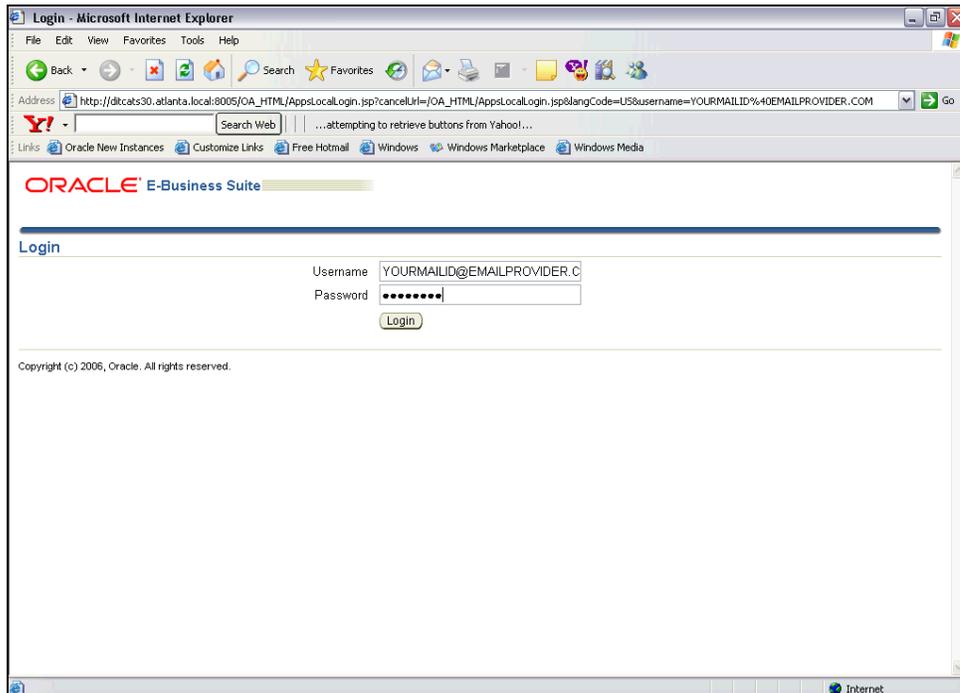
Everytime when the City invites you for its solicitation, you will be sent an automated email message from the application titled:  
"You are invited".

You may then proceed to login to City's application and review the RFQ.

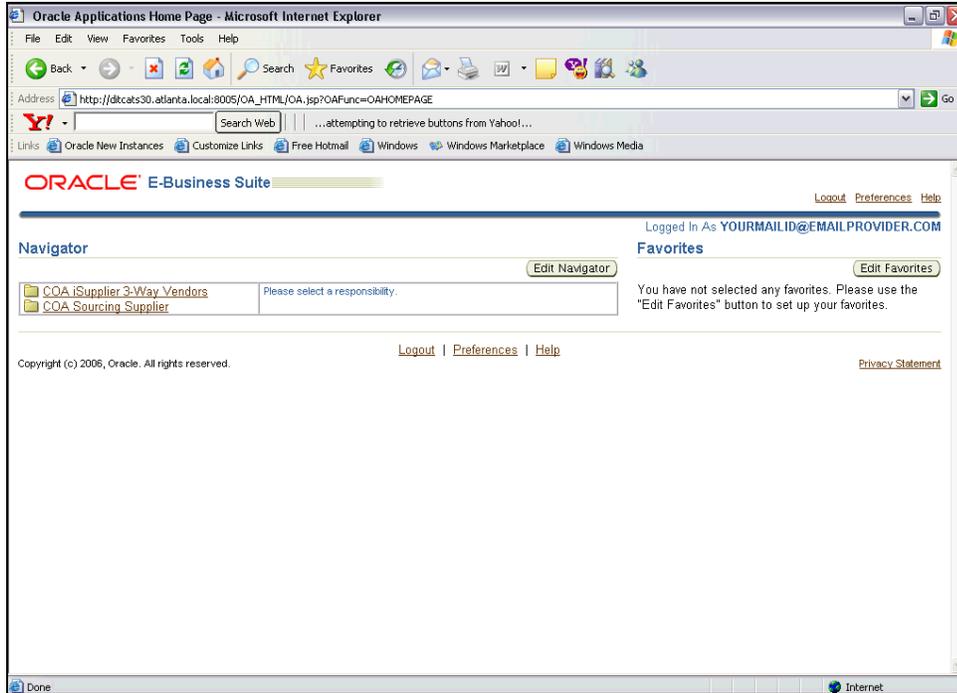
RFQ - Request for Quotations

RFI - Request for Information.

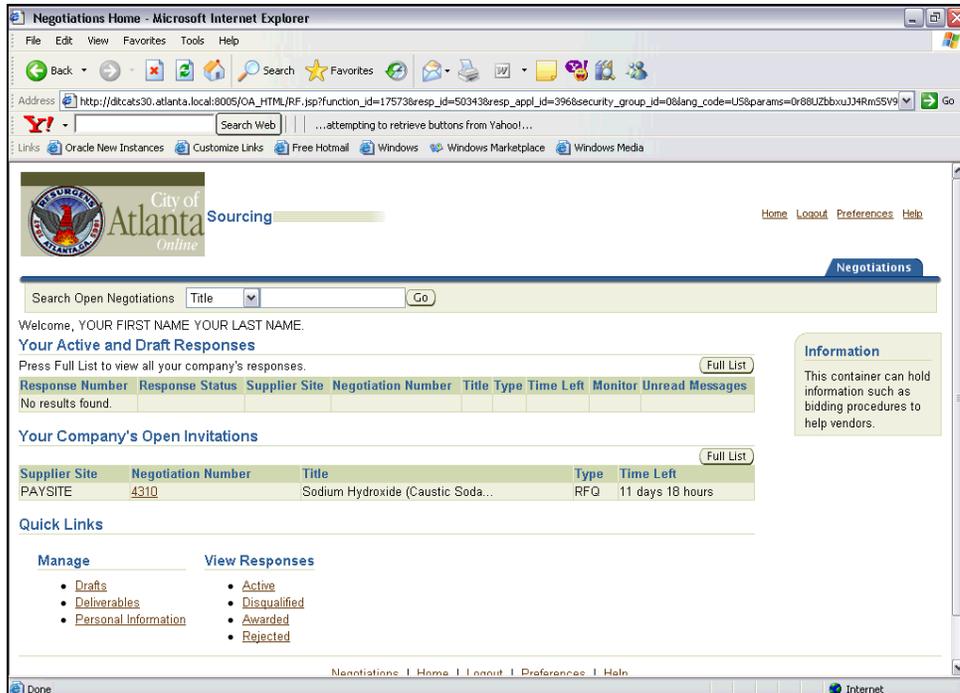
## Procedure



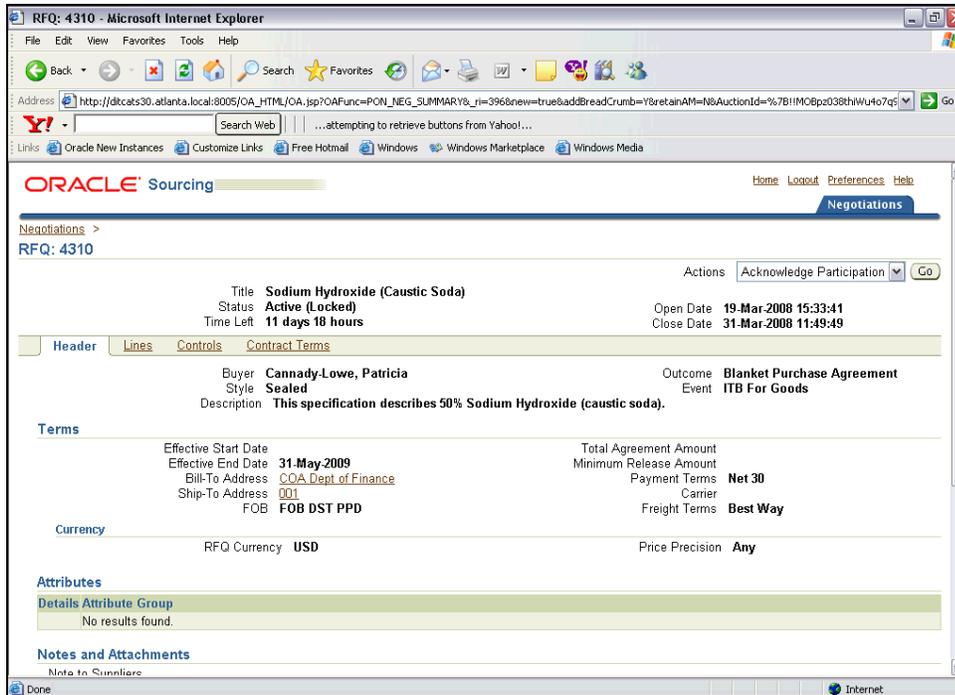
Step	Action
1.	<p>Click the <b>Login</b> button.</p> <p>Please refer to "Login to iSupplier Portal" topic for detailed instructions on how to login to the application.</p> 



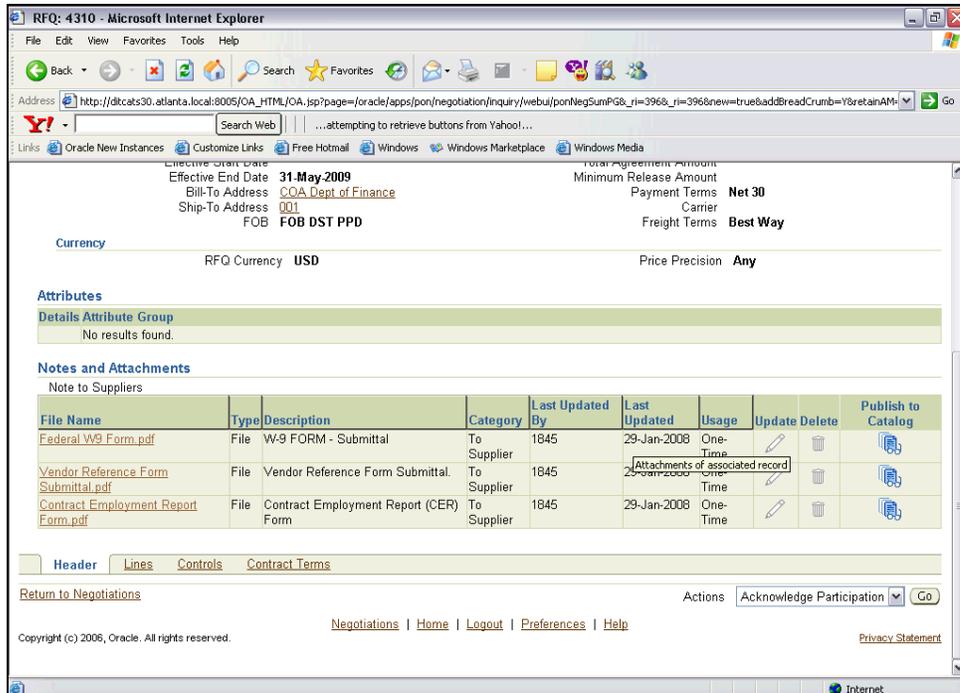
Step	Action
2.	<p>Click the <b>COA Sourcing Supplier</b> link.</p> <p>This is your Homepage.</p> <p>If your homepage looks totally different, then you may not have completed your Phase - II registration process. Please refer to the previous chapters for detailed instructions regarding Phase - II registration.</p> <p>We are now going to click "COA Sourcing Supplier"</p> <p><u>COA Sourcing Supplier</u></p>
3.	<p>Click the <b>Sourcing Home Page</b> link.</p> <p><u>Sourcing Home Page</u></p>



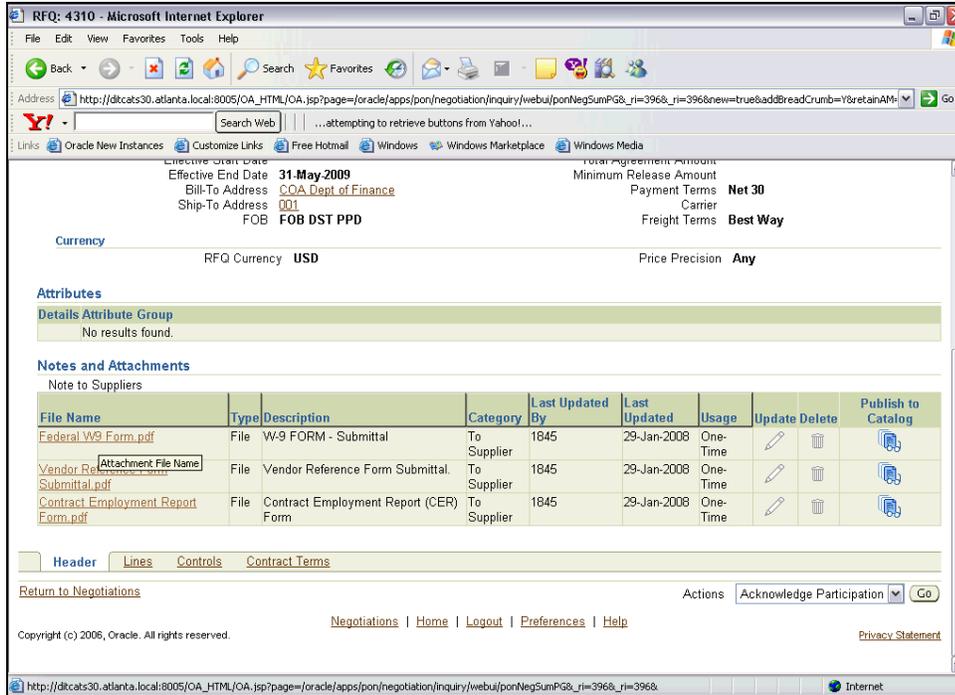
Step	Action
4.	<p>Click the <b>4310</b> link.</p> <p>Let us take a brief moment to explore this Sourcing Home Page.</p> <p>The first section is "Your Active and Draft responses". In this section you may find all your responses that are active or in progress. Currently this section is empty.</p> <p>Under this section, we have "Your Company's Open invitation. In this section you may find the current Solicitation that we are trying to acknowledge.</p> <p>In the bottom of the page, you will find the "Quick Links" section. In this section you will have shortcuts to many of the often used features.</p> <p><b>4310</b></p>



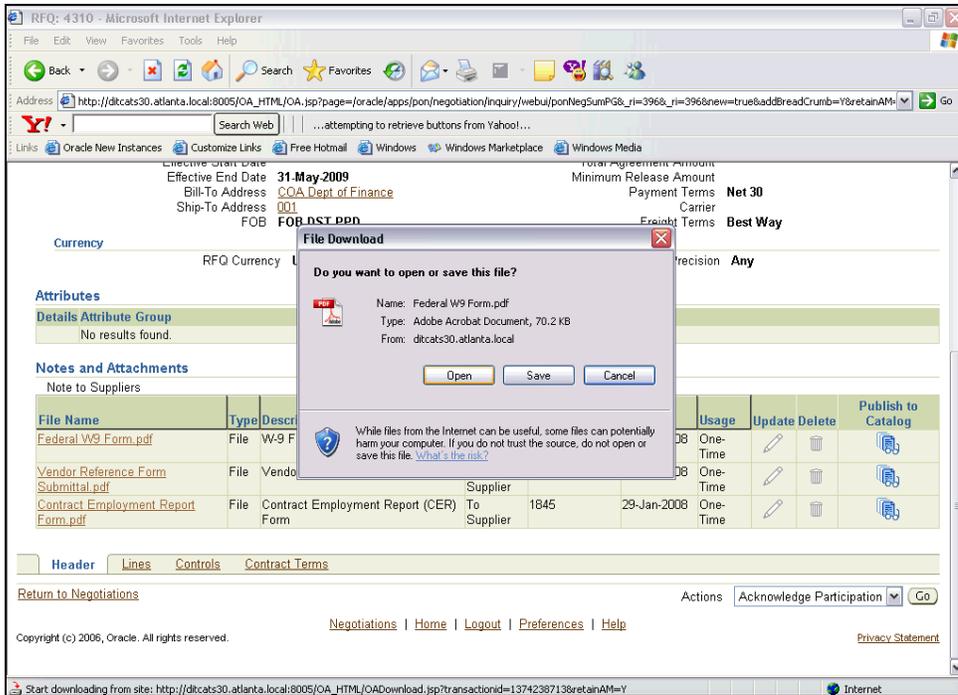
Step	Action
5.	<p>Click the <b>Actions</b> list.</p> <p>Upon clicking the RFQ Number, the application takes you to the details of the RFQ. An RFQ consists of Header, Lines, Controls &amp; Contract Terms sections.</p> <p>You may review the Header details including, the Title, Buyer, Style, Description, Bill and Ship Tos, any attributes (if defined) and other notes and file attachments.</p> <p><input type="text" value="Acknowledge Participation"/></p>



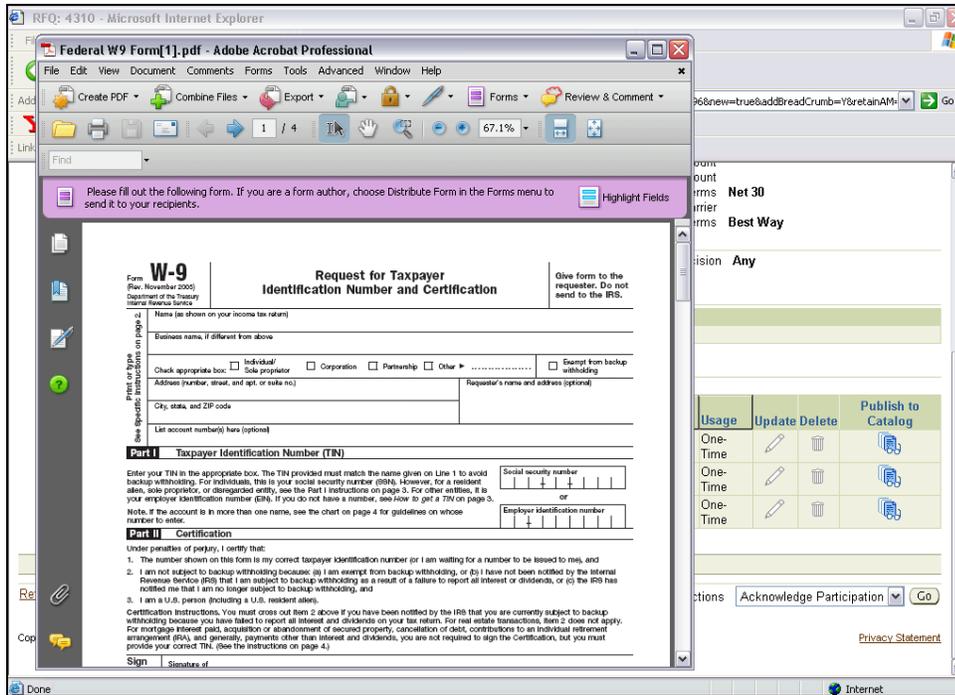
Step	Action
6.	<p>Scroll the object with the mouse wheel.</p> <p>At the bottom of the page, you may find a few file attachments to the RFQ. These are necessary files for the RFQ and without them, the RFQ will be considered incomplete.</p> <p>You may be required to download these files for further review and in some cases, you may have to fill those forms and upload them back as a part of your response.</p> <p>Now, let us learn to download the files from the RFQ.</p>



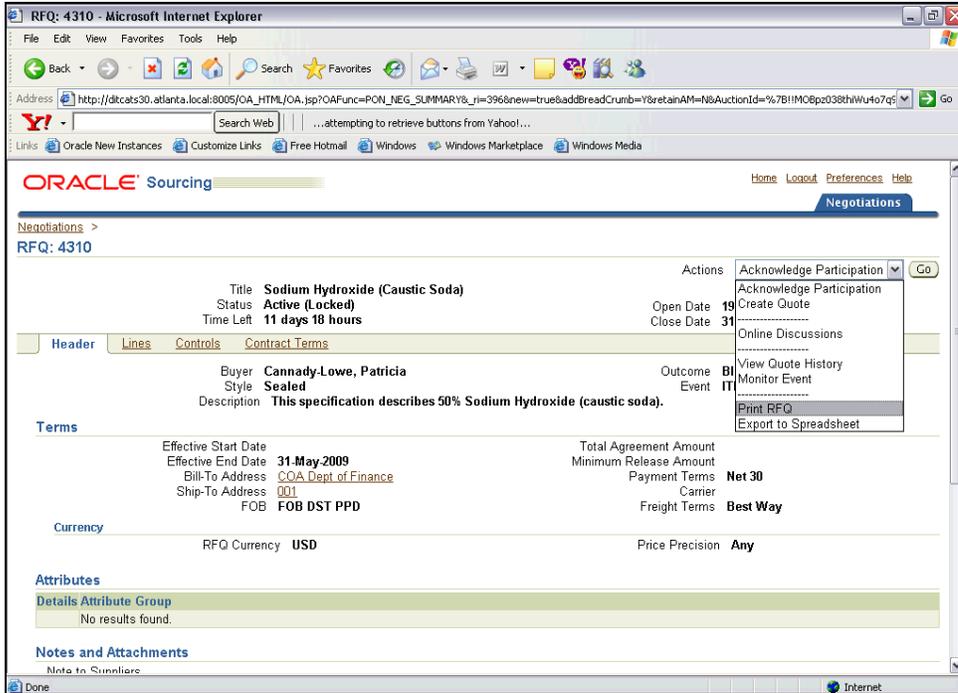
Step	Action
7.	<p>Click the <b>Federal W-9 Form.pdf</b> link.</p> <p>You may click the file name to open the attached file.</p> <p>Please be sure to read the description of the file and sometimes that may give you a clue about what the file attachment is about.</p> <p><u>Federal W9 Form.pdf</u></p>



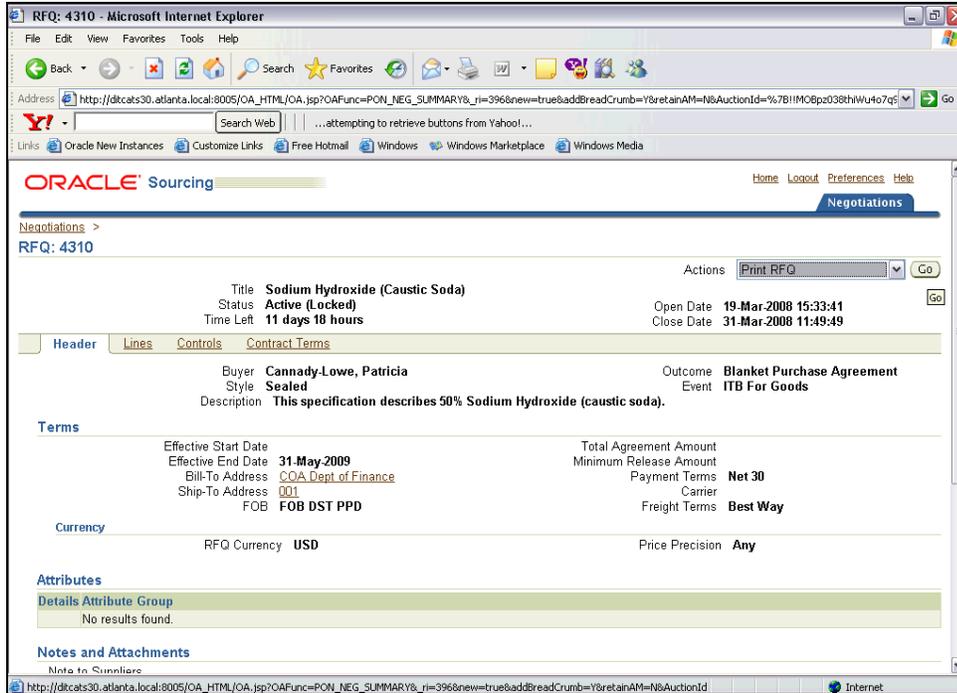
Step	Action
8.	<p>Click the <b>Open</b> button.</p> <p>Click the Open button on the dialog box to open the file attachment.</p> <p>You may require Adobe Reader to view these files.</p>  <p><i>or</i></p> <p>Press <b>[Alt+O]</b>.</p>



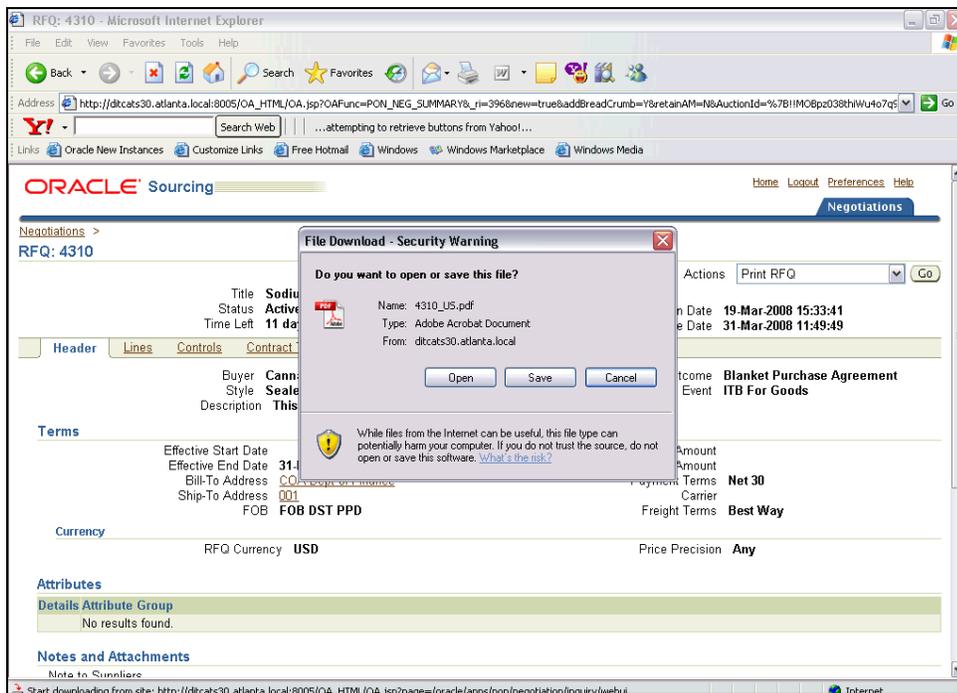
Step	Action
9.	<p>Click the <b>File</b> menu.</p> <p>Once opened, you can print them from your computer like any other document. You can use File&gt;Print to print your document.</p> <p>After successful printing you may close the window and go back to the application.</p> <p>You may repeat this process by clicking other file attachment names and printing them.</p> <p></p> <p>or</p> <p>Press <b>[Alt+F]</b>.</p>
10.	<p>Point to the menu.</p> <p> </p>



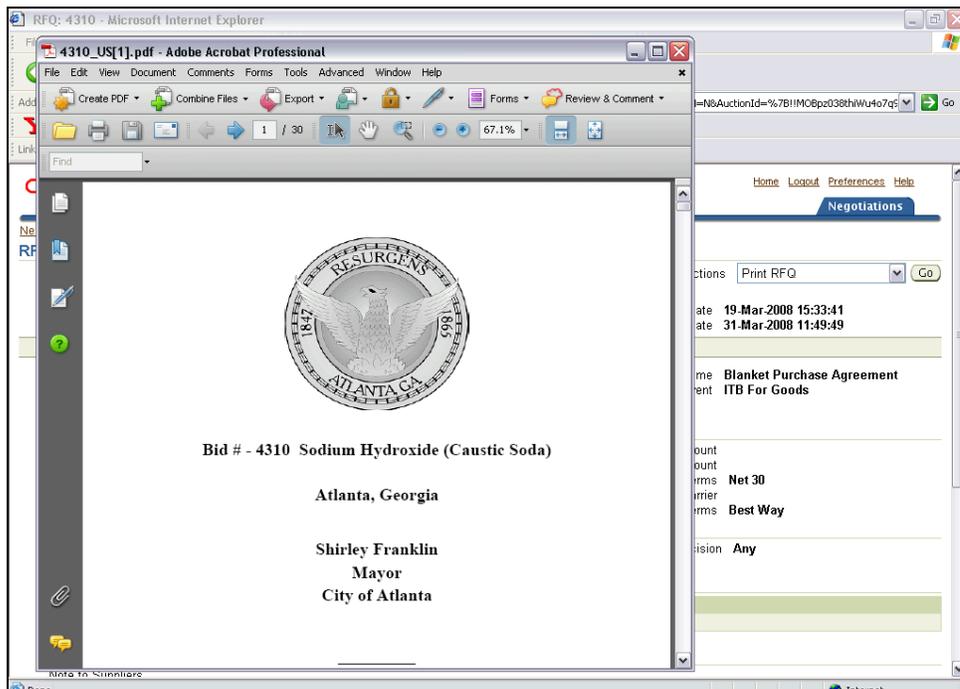
Step	Action
11.	<p>Click the <b>Print RFQ</b> list item.</p> <p>Now, let us learn to print the RFQ document itself.</p> <p>NOTE: The Print document will print all the file attachments as well and you do not need to print the file attachments individually.</p> <p><b>Print RFQ</b></p>



Step	Action
12.	Click the <b>Go</b> button. 

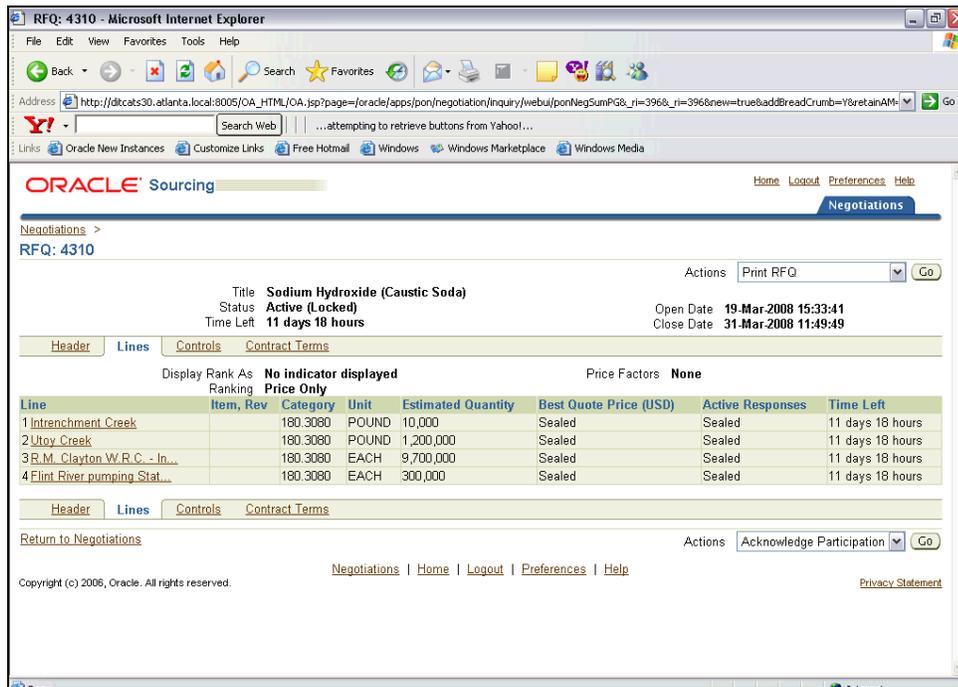


Step	Action
13.	<p>Point to the <b>Open</b> object.</p> <p>Click the Open button to print the RFQ.</p> <p>You will require Adobe Reader to open the document.</p> 
14.	<p>Click the <b>Open</b> button.</p>  <p><i>or</i></p> <p>Press <b>[Alt+O]</b>.</p>

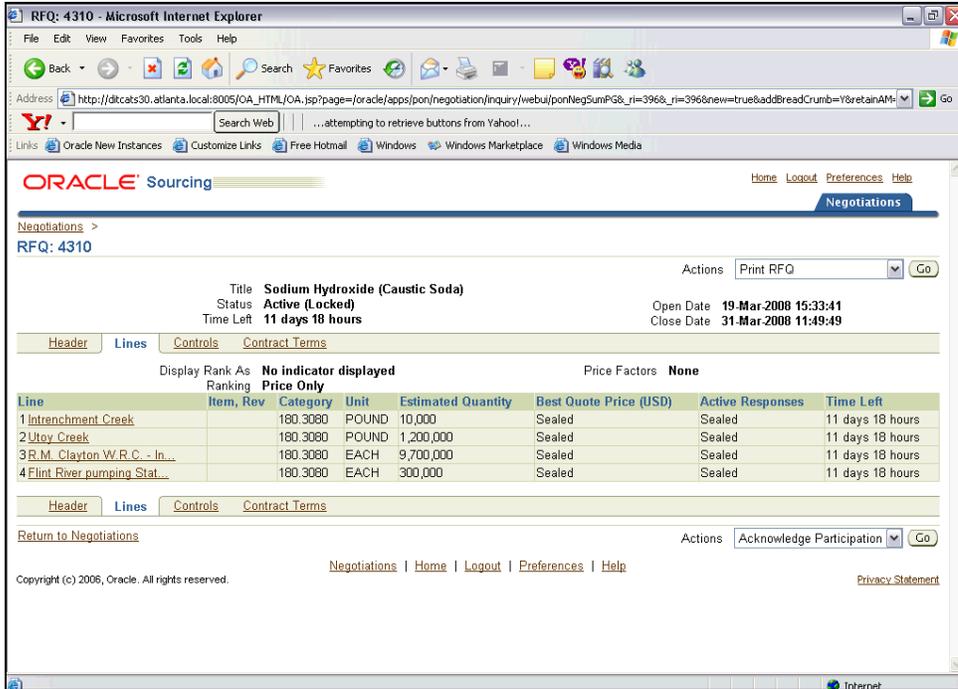


Step	Action
15.	<p>Click the <b>File</b> menu.</p> <p>You can print this, like you print any other document from your computer through File&gt; Print.</p> <p>After printing, you can close the browser.</p> 

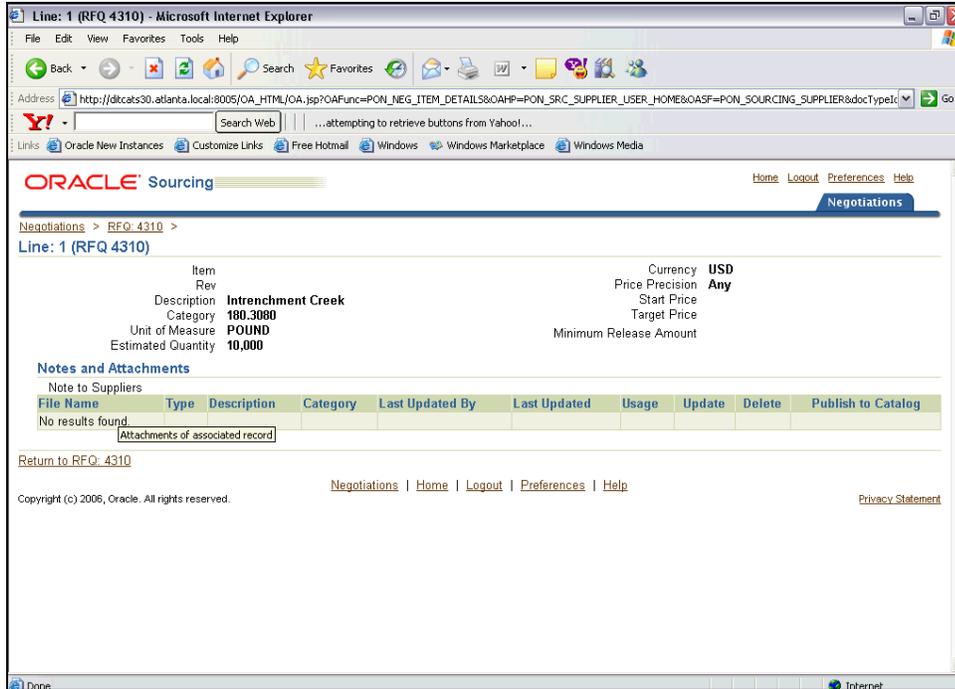
Step	Action
	<i>or</i> Press <b>[Alt+F]</b> .
16.	Point to the menu. 
17.	Click the menu. 



Step	Action
18.	Click the object.  Now, let us learn to review the line items on the solicitation.  You can click on the Lines as shown to review the lines. 

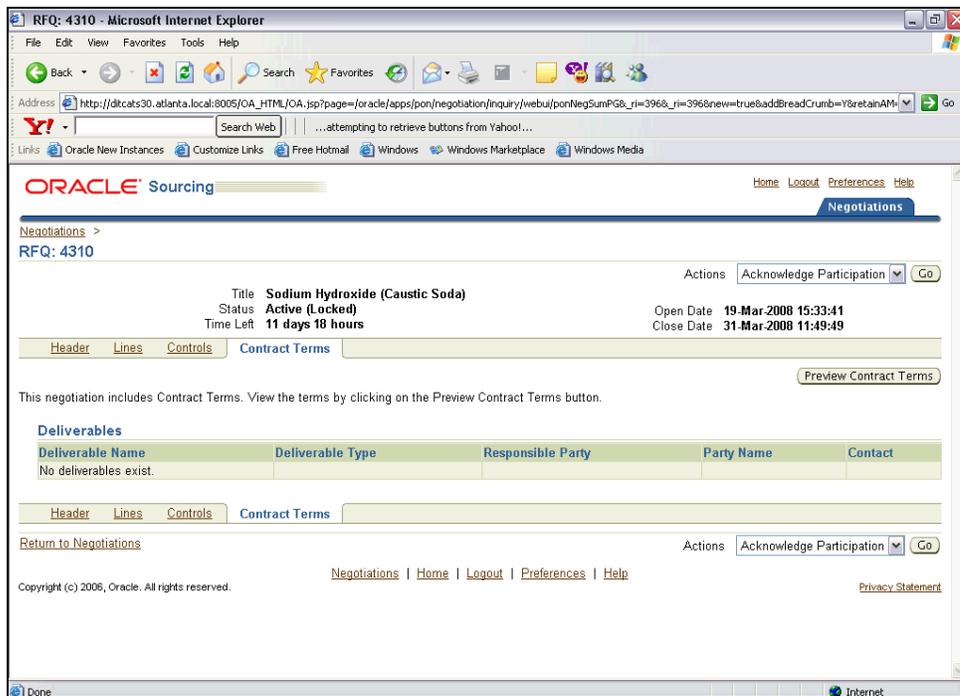


Step	Action
19.	<p>Point to the <b>Intrenchment Creek</b> object.</p> <p>In this example, there are 4 line items the City is soliciting for.</p> <p>You may get the line details by clicking on the Line as shown.</p> <p><u>Intrenchment Creek</u></p>
20.	<p>Click the <b>Intrenchment Creek</b> link.</p> <p><u>Intrenchment Creek</u></p>

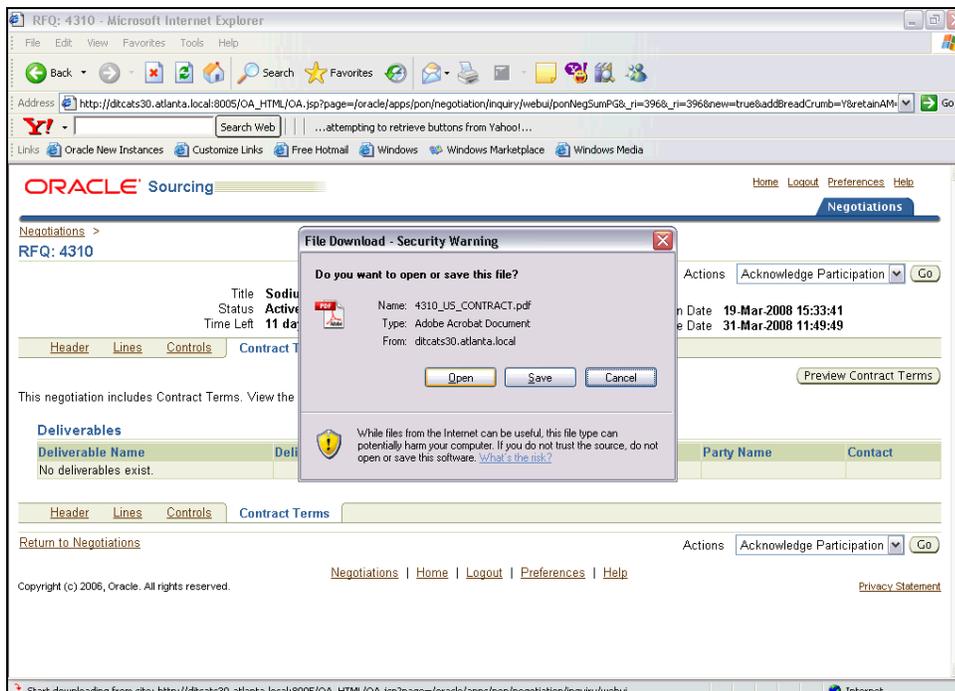


Step	Action
21.	<p>Point to the <b>Return to RFQ: 4310</b> object.</p> <p>Please carefully review the all the line items as illustrated before beginning to compile your pricing sheet.</p> <p><a href="#">Return to RFQ: 4310</a></p>
22.	<p>Click the <b>Return to RFQ: 4310</b> link.</p> <p>You may click on the "Return to RFQ" link to go back to the previous page.</p> <p><a href="#">Return to RFQ: 4310</a></p>
23.	<p>Point to the <b>Controls</b> object.</p> <p>Let us now review the governing rules of this RFQ.</p> <p>You may begin this by clicking the Controls link as shown.</p> <p><a href="#">Controls</a></p>
24.	<p>Click the <b>Controls</b> link.</p> <p><a href="#">Controls</a></p>

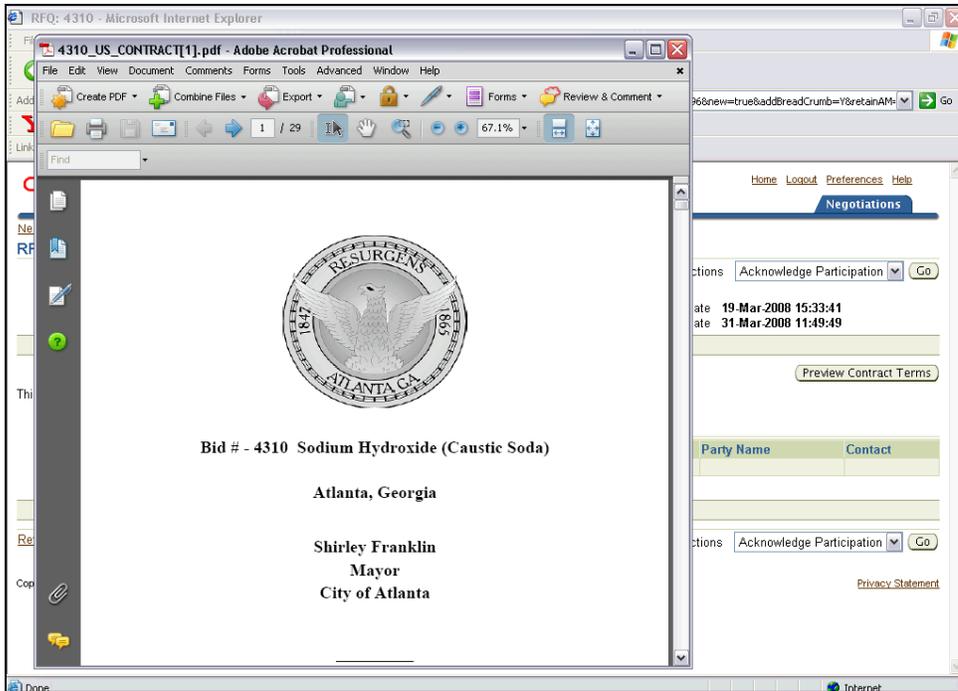
Step	Action
25.	<p>Point to the <b>Contract Terms</b> object.</p> <p>In the Controls section, you get to review all the dates and response rules.</p> <p>If the box for suppliers are allowed to respond to selected lines is checked, then you may pick and choose your lines while responding, if not, then you are forced to respond to all the requested line items of the RFQ.</p> <p>If the checkbox Suppliers are allowed to provide multiple responses is checked, then the application will allow you to submit more than one response. However, the latest response alone will be considered by the City and all prior responses will be neglected for awarding considerations.</p> <p>If the box Negotiation is restricted to invited suppliers only is checked, then unless you are a invited supplier for the soliciting event, you will not be able to submit your responses.</p> <p><a href="#">Contract Terms</a></p>
26.	<p>Click the <b>Contract Terms</b> link.</p> <p>Let us now review the Contract Terms of this sourcing event.</p> <p><a href="#">Contract Terms</a></p>



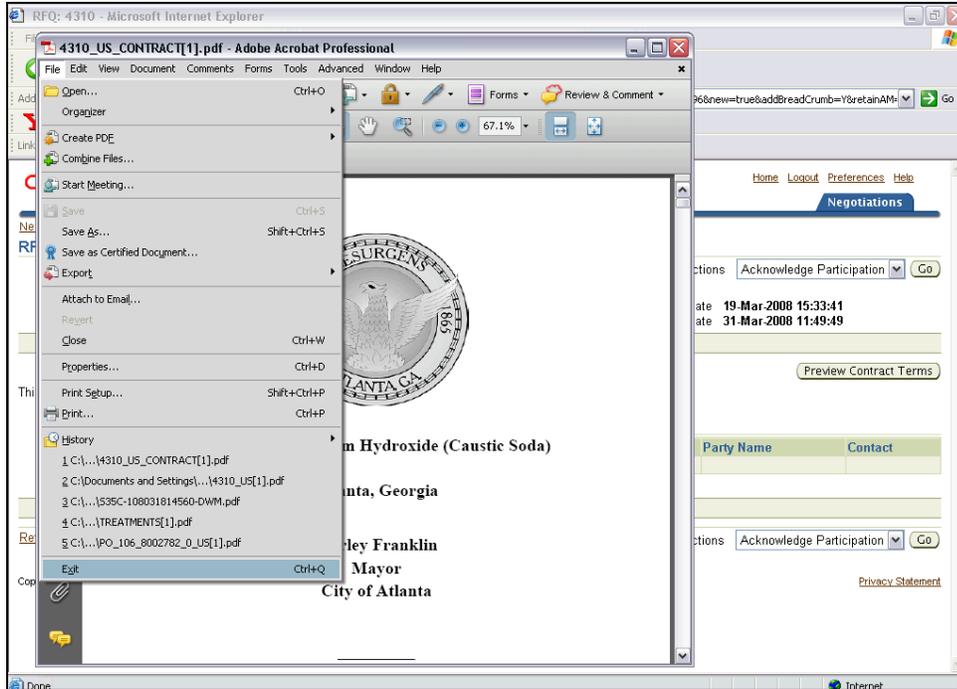
Step	Action
27.	<p>Point to the <b>Preview Contract Terms</b> object.</p> <p>You may click on the Contract Terms to review the Terms and Conditions that are applicable to this Sourcing event.</p> <p>NOTE: When you print this sourcing document all the Terms and Conditions would have also got printed as a part of the document. Therefore, there is no necessary for you to print this document again.</p> 
28.	<p>Click the <b>Preview Contract Terms</b> button.</p> <p>You may begin previewing the contract terms by clicking the "Preview Contract Terms" button.</p> 



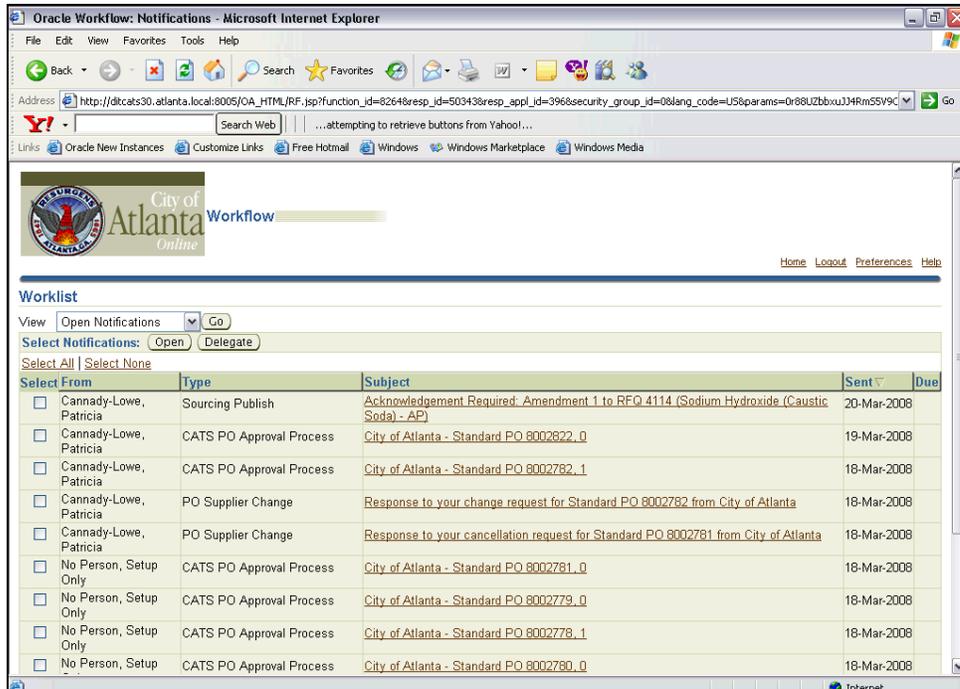
Step	Action
29.	<p>Click the <b>Open</b> button.</p>  <p>or</p> <p>Press <b>[Alt+O]</b>.</p>



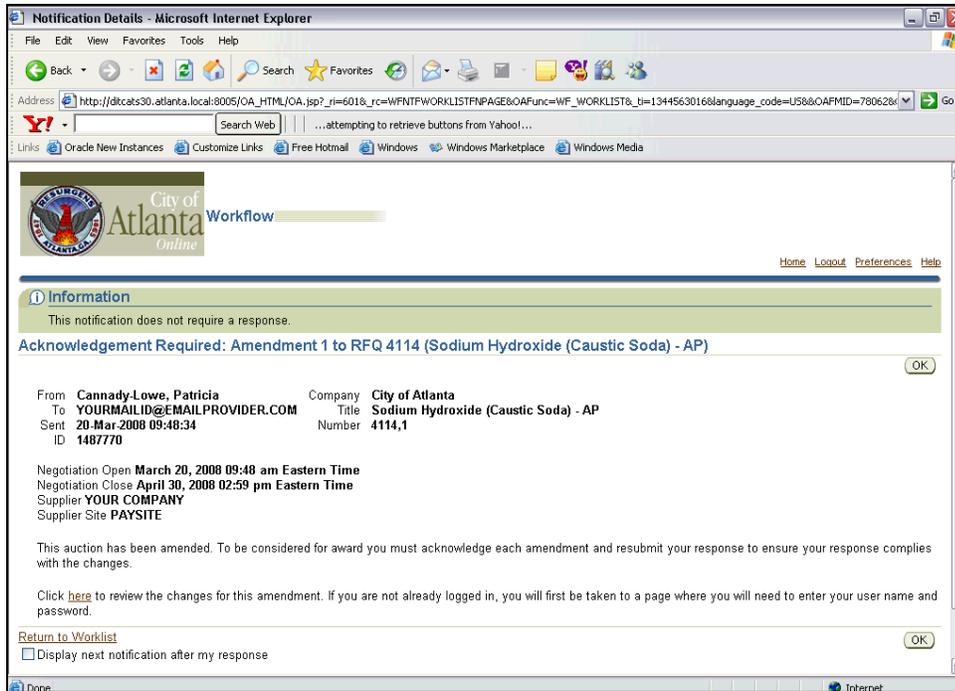
Step	Action
30.	Click the <b>File</b> menu. <input type="button" value="File"/>
	<i>or</i> Press <b>[Alt+F]</b> .



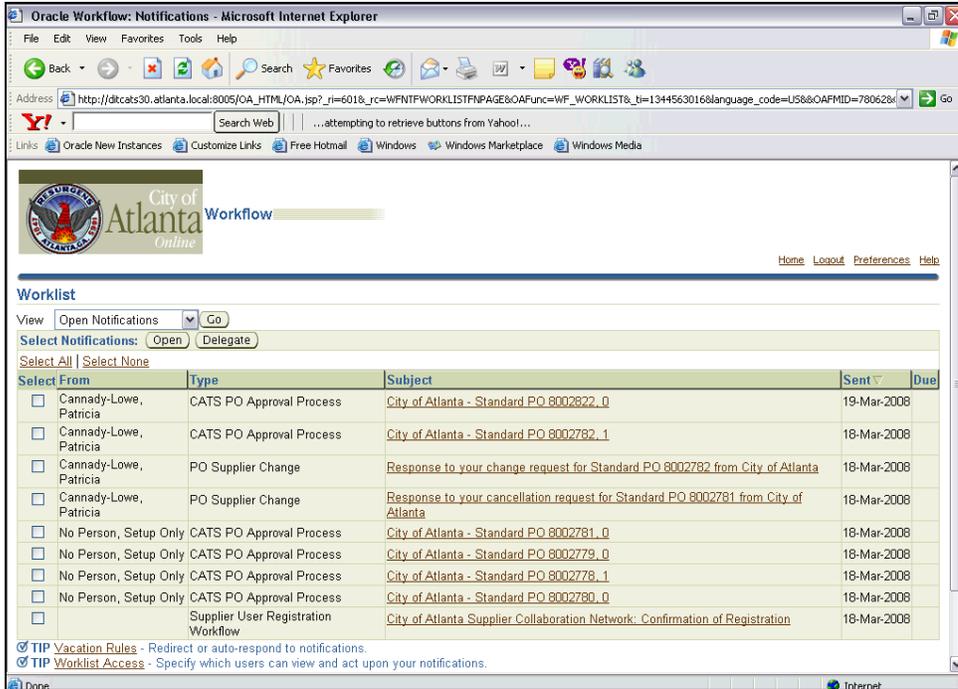
Step	Action
31.	Click the <b>Header</b> link. 
32.	Click the <b>PON_SOURCING_TAB_S</b> tab. 



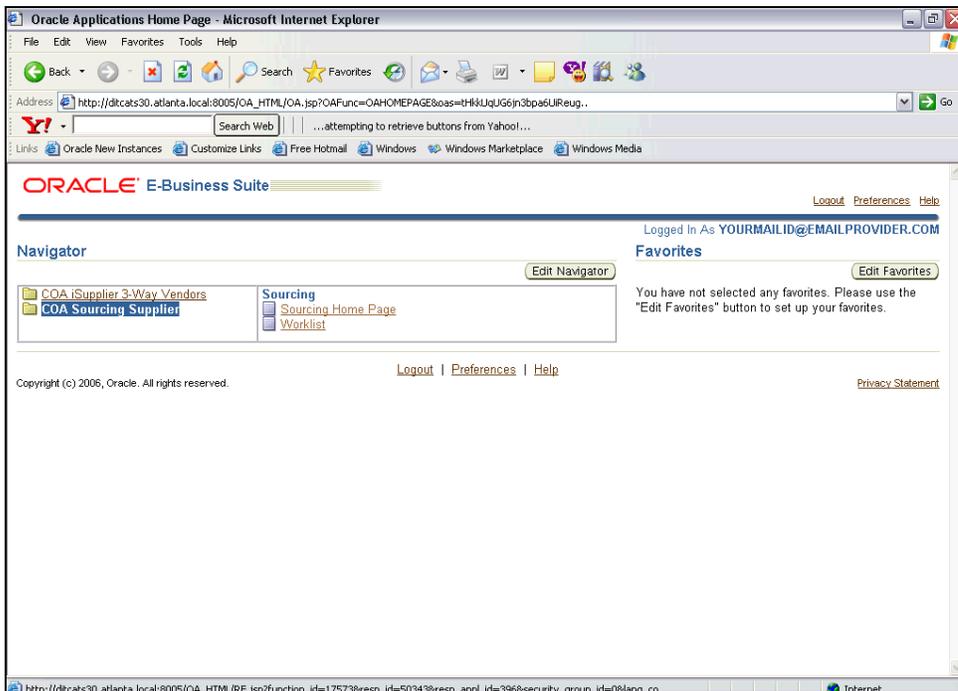
Step	Action
33.	<p>Click the <b>Cannady-Lowe, Patricia</b> option.</p> <p>Let us now learn, how to review an amended solicitation document.</p> <p>Everytime an amendment is made to a sourcing document, if you are an invited supplier or if you had any participation (like acknowledging and or submitting your quote and or getting a manual copy from DOP etc), you will be sent an electronic email from the application.</p> <p>The email titled "Acknowledgement Required: Amendment to " (as shown here) will be your cue for logging into the application.</p> <p>In our example, we have RFQ 4114 amended and now we are going to review the changes.</p> <input type="checkbox"/>
34.	<p>Click the <b>Shows details of all selected notifications</b> button.</p> <p>Let us open the notification and see what the email says.</p> <input type="button" value="Open"/>



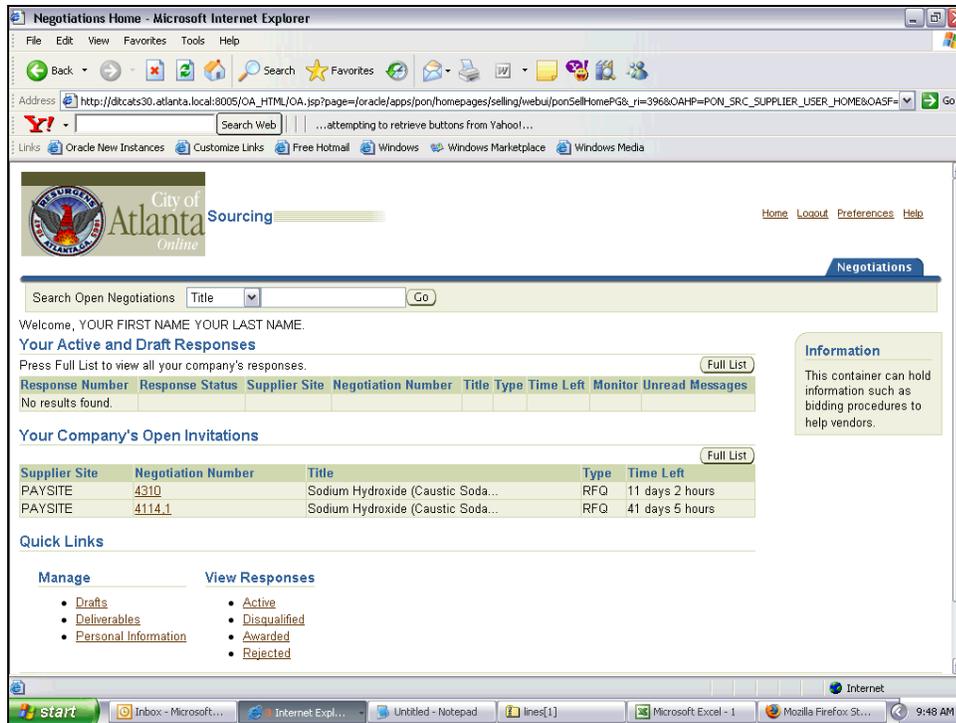
Step	Action
35.	<p>Click the <b>Close all selected notifications</b> button.</p> <p>Let us note down the RFQ number (4114, 1) and proceed with the next step.</p> <p>NOTE: The "," in the RFQ number indicates that the document is amended and the number after the comma (number one (1) in this case) indicates the number of amendments that the document went through.</p> <p><input type="button" value="OK"/></p>



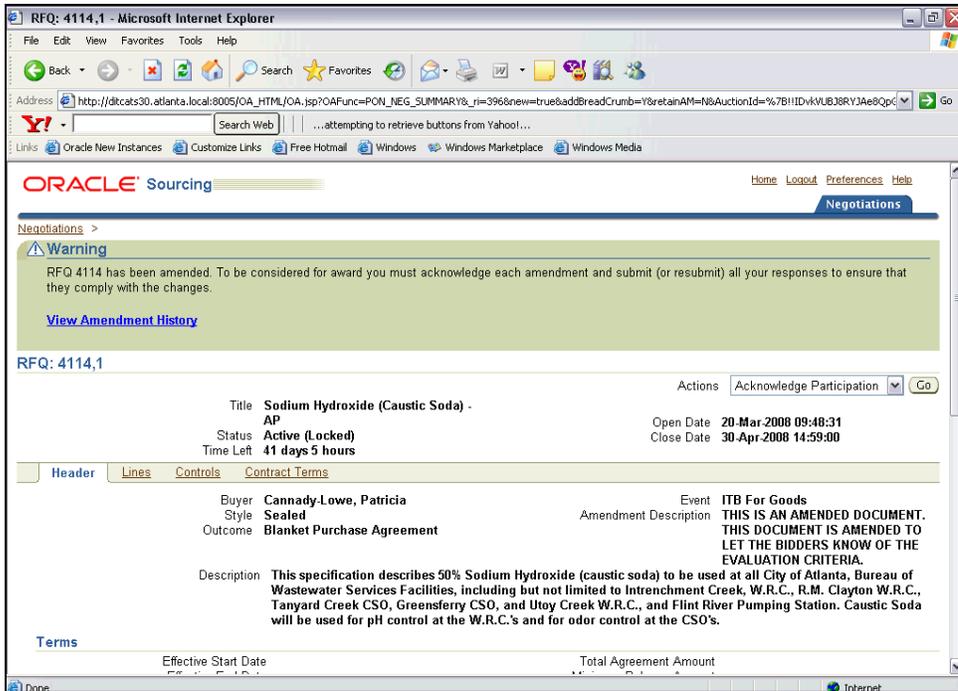
Step	Action
36.	Click the <b>Home</b> link. <a href="#">Home</a>



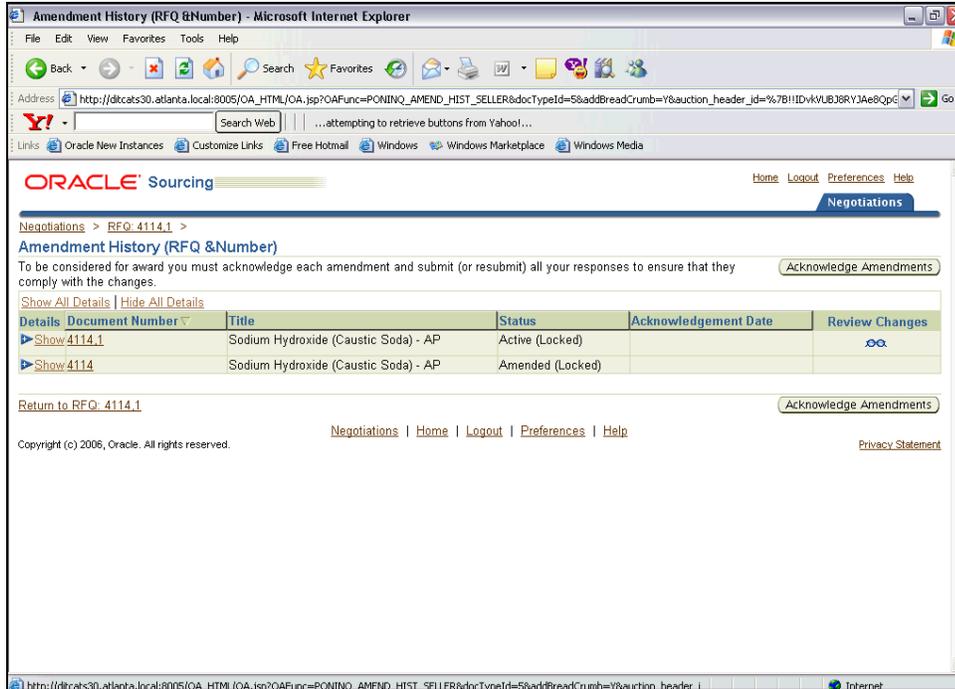
Step	Action
37.	<p>Click the <b>Sourcing Home Page</b> link.</p> <p>Let us go to the Sourcing Homepage to review the amendments.</p> <p><b>Sourcing Home Page</b></p>



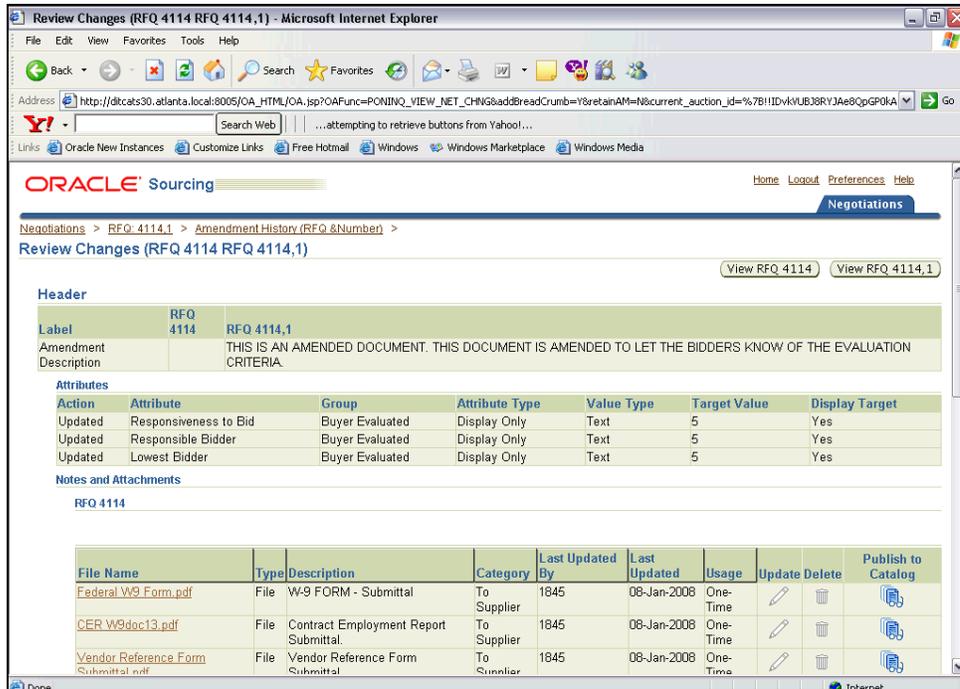
Step	Action
38.	<p>Release the mouse button.</p> <p>Let us open the document by clicking it.</p>
39.	<p>Click the <b>4114,1</b> link.</p> <p><b>4114,1</b></p>



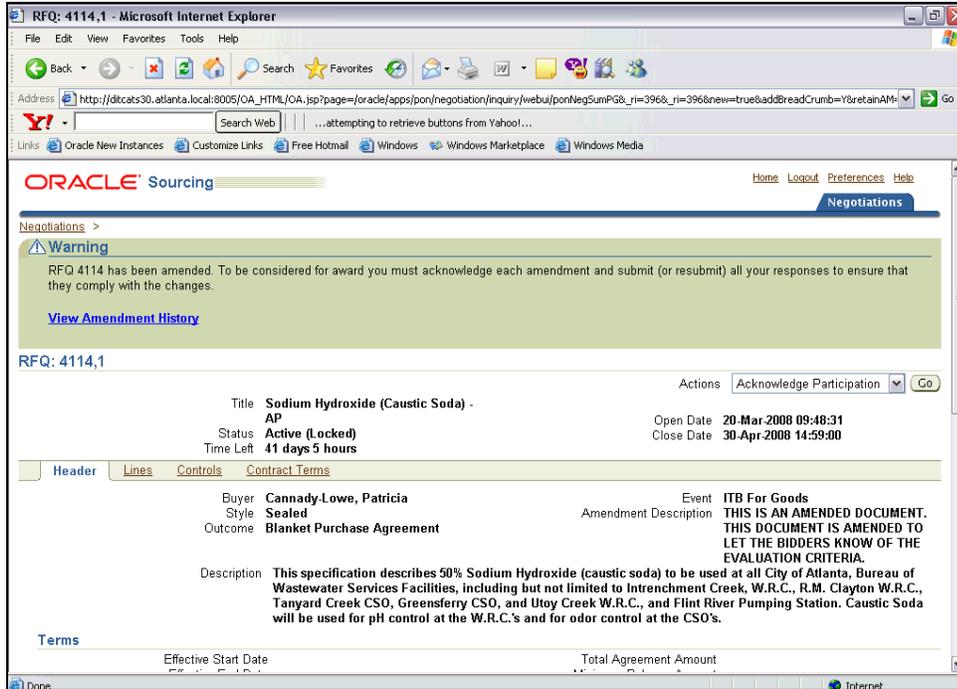
Step	Action
40.	<p>Point to the <b>View Amendment History</b> object.</p> <p>Let us review the changes to the document by clicking the View Amendment History.</p> <p><a href="#">View Amendment History</a></p>
41.	<p>Click the <b>View Amendment History</b> link.</p> <p><a href="#">View Amendment History</a></p>



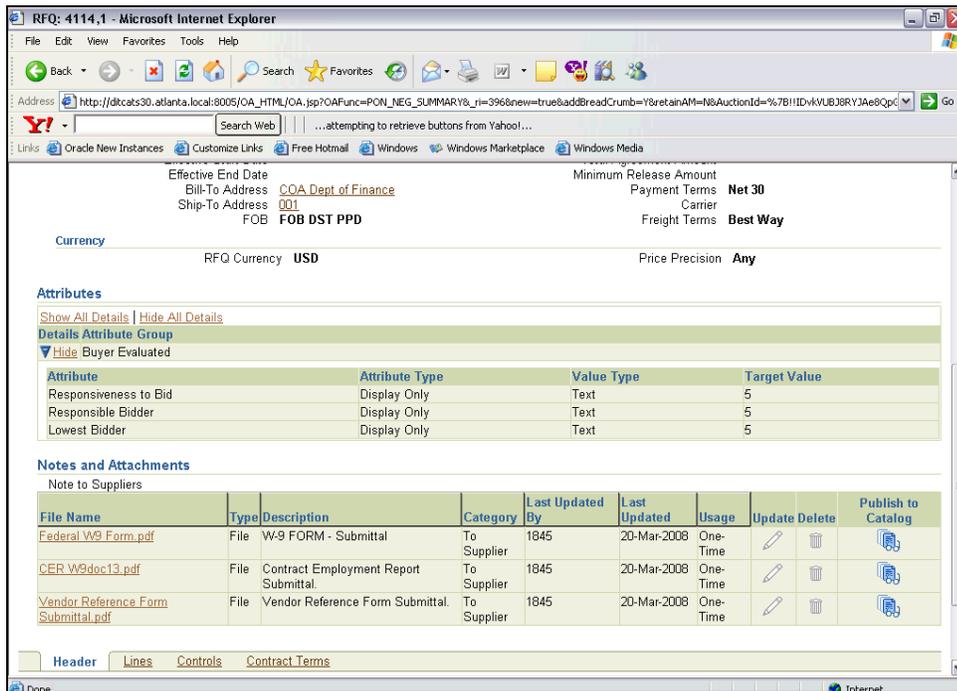
Step	Action
42.	<p>Point to the <b>Show All Details</b> object.</p> <p>Please read the message on the top of the page, urging the suppliers to acknowledge all the amendments and resubmit their responses.</p> <p>Let us click on the Show All Details to review the changes.</p> <p></p>
43.	<p>Click the <b>Show All Details</b> link.</p> <p></p>
44.	<p>Point to the <b>Active (Locked)</b> object.</p> <p>Here we have a summary of the changes made to the document and by clicking Review Changes we will be able to review the exact changes to the document.</p> <p></p>
45.	<p>Click the <b>Active (Locked)</b> button.</p> <p></p>



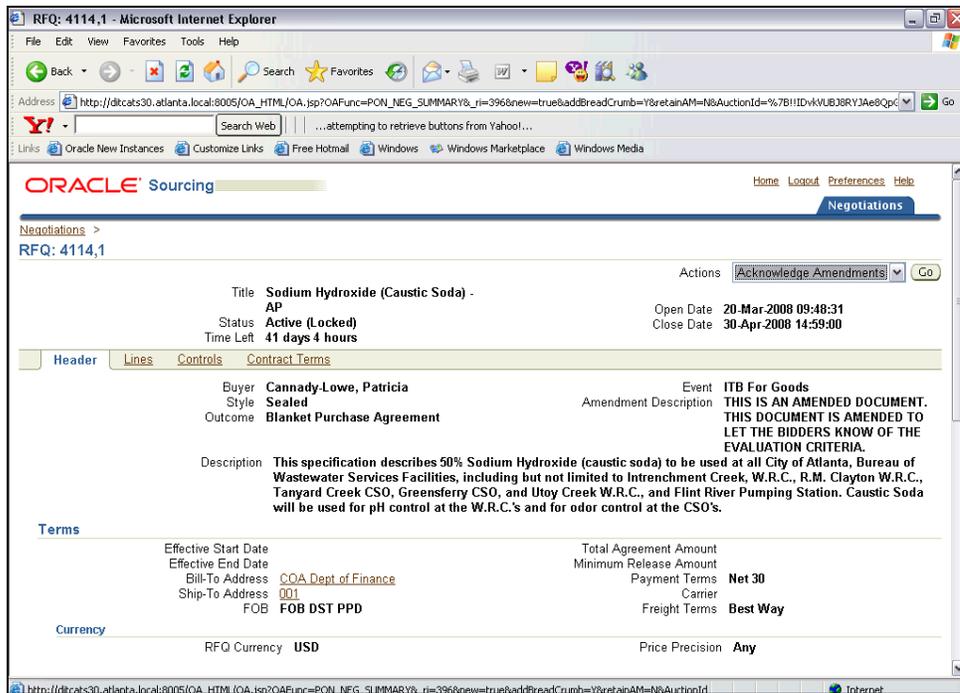
Step	Action
46.	<p>Release the mouse button.</p> <p>The application explains all the changes made to the original document in a more detailed fashion here.</p>
47.	<p>Release the mouse button.</p> <p>When you review the RFQ, you may now notice that the suppliers are let known of the evaluation criteria.</p>
48.	<p>Click the <b>RFQ: 4114,1</b> link.</p> <p><a href="#">RFQ: 4114,1</a></p>



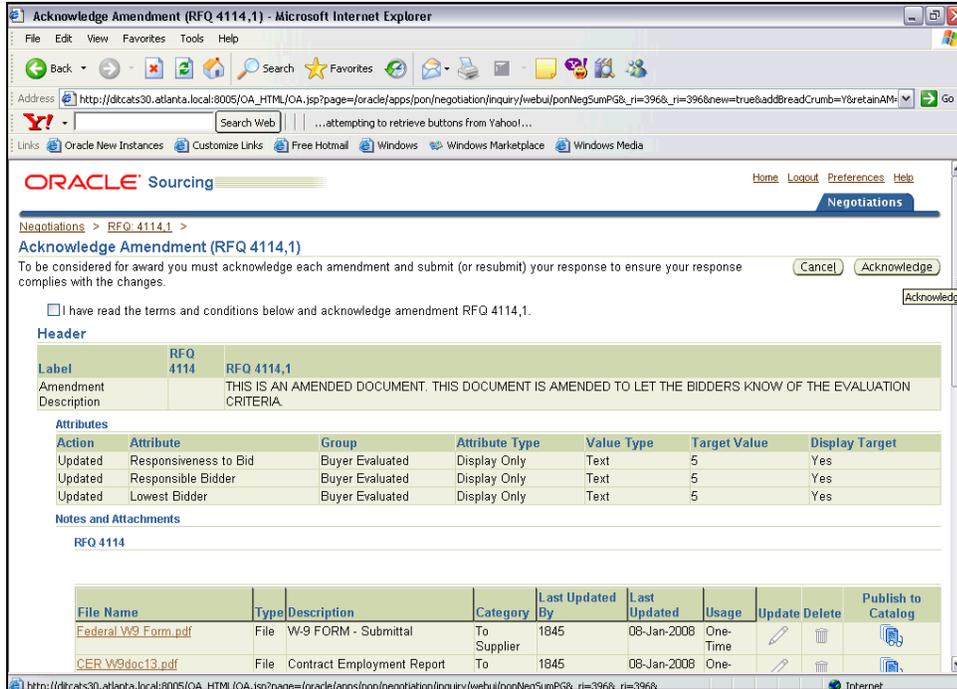
Step	Action
49.	Release the mouse button.



Step	Action
50.	<p>Point to the object.</p> <p>You may now notice the evaluation criteria being displayed under the Attributes Section.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;">Responsible Bidder</div>



Step	Action
51.	<p>Click the <b>Go</b> button.</p> <p>Let us now learn to acknowledge amendments.</p> <p>It is mandatory that suppliers acknowledge all the amendments made to a sourcing document by the City.</p> <p>Chose "Acknowledge Amendments" from the Actions list and click Go button.</p> <div style="border: 1px solid black; padding: 2px; width: fit-content;">Go</div>



Step	Action
52.	<p>Click the <b>I have read the terms and conditions below and acknowledge amend</b> option.</p> <p>After careful review of the amendments, you are required to check the box and acknowledge the amendments.</p> <input type="checkbox"/>
53.	<p>Click the <b>Acknowledge</b> button.</p> <input type="button" value="Acknowledge"/>



## How to view RFQ lines

### *How to view RFQ lines?*

In this exercise, let us learn to review the line items on an RFQ.

In the previous exercise, we learnt how to review the lines. That was good enough if you have only a few lines like the one we had in our example.

But typically, City solicits a lot of products in a single sourcing event and they usually result in a contract (over a finite period of time) with the suppliers.

Let us now learn to review such solicitations with larger number of items being solicited for.

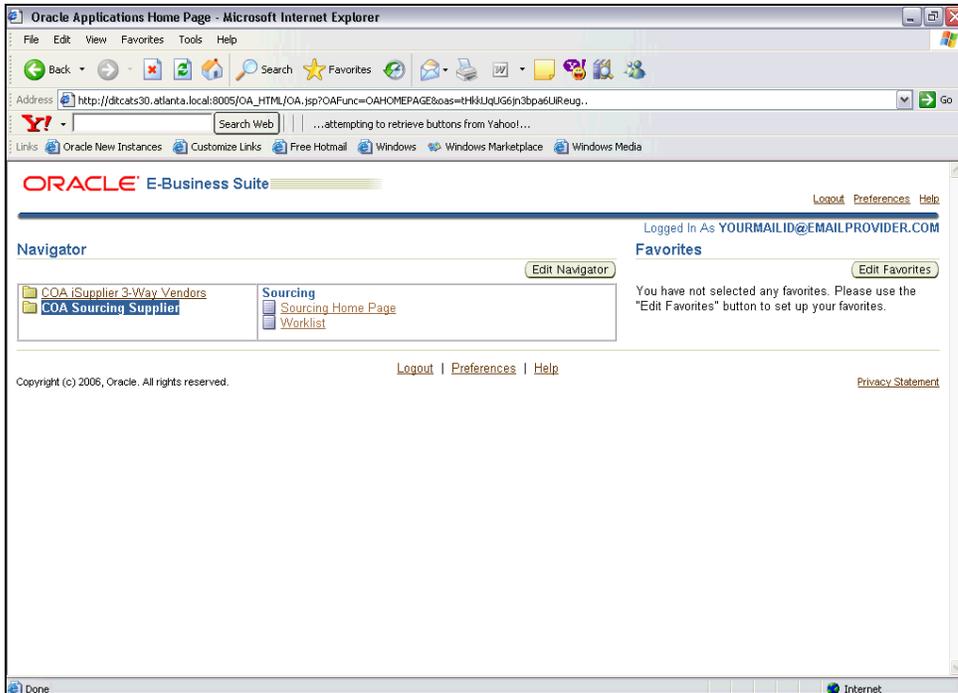
The application allows suppliers to download the pricing sheet to a spreadsheet. It allows you to work on the spreadsheet independently and once you compile your responses and pricing, you can upload your pricing sheet from your spreadsheet. In this exercise, you will be learning to download the line items to a spreadsheet and as a part of "How to import a response from a spreadsheet?", you will be learning how to upload your spreadsheet back as your pricing sheet.

### **CAUTION:**

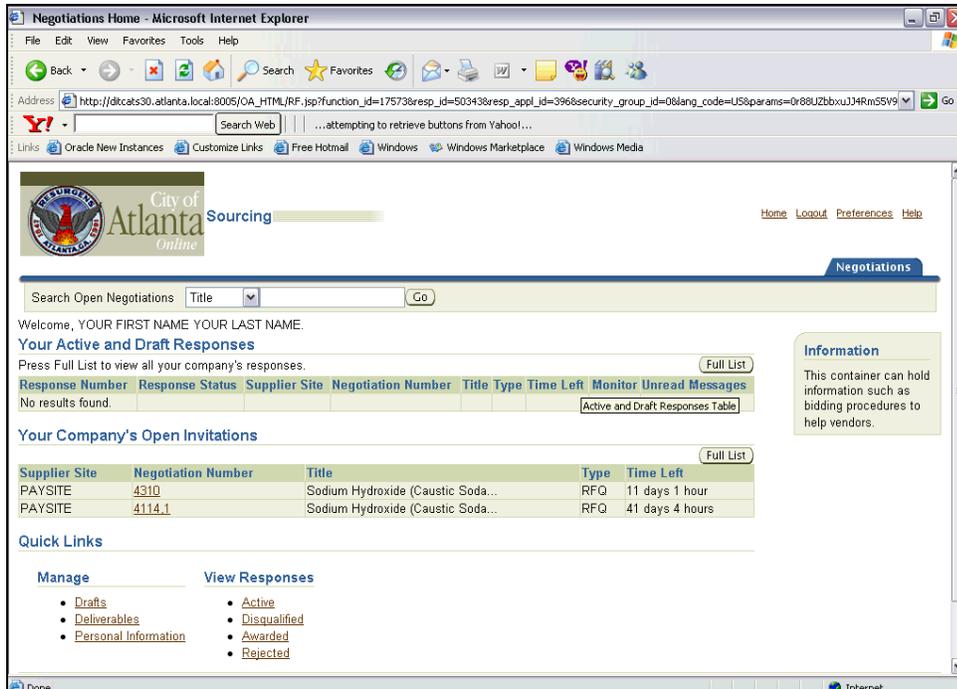
If you are planning to import the spreadsheet as your response then:

1. DO NOT ALTER the order of the columns (if you are planning to import the spreadsheet back).
2. DO NOT ALTER contents of the column titled "\* End of line delimiter".
3. DO NOT ALTER the header row.

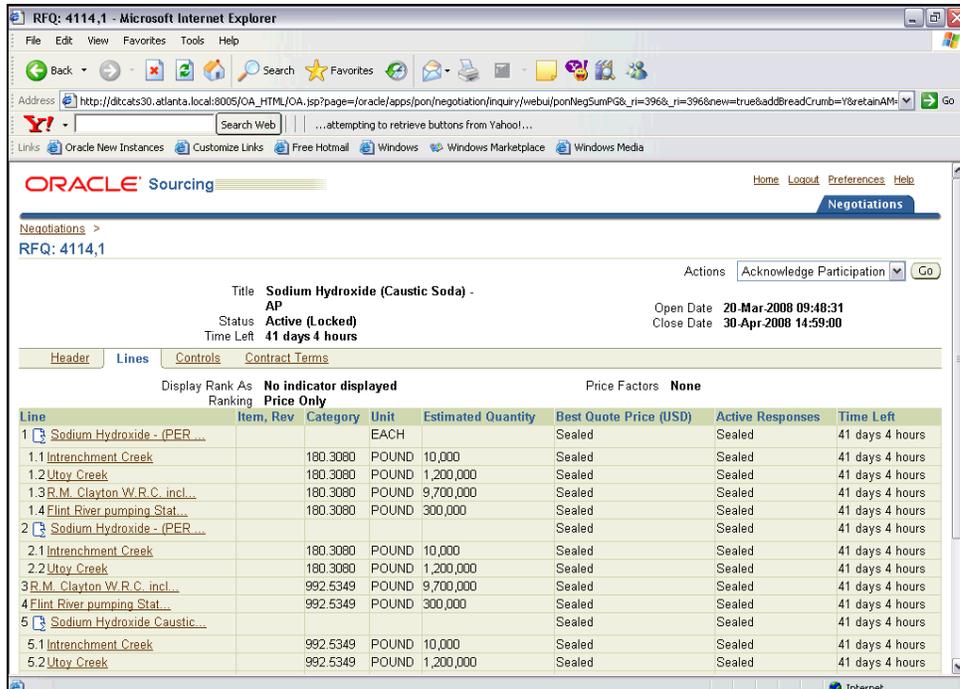
## Procedure



Step	Action
1.	Click the <b>Sourcing Home Page</b> link. <a href="#">Sourcing Home Page</a>

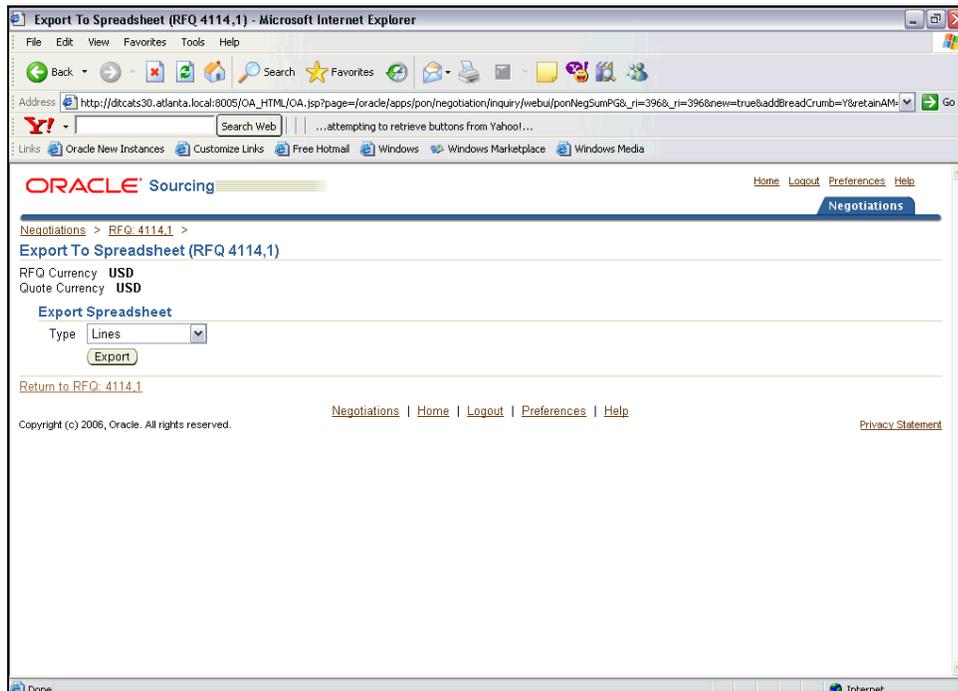


Step	Action
2.	Point to the <b>4114,1</b> object. 
3.	Click the <b>4114,1</b> link.  Let us take a brief moment to explore this Sourcing Home Page.  The first section is "Your Active and Draft responses". In this section you may find all your responses that are active or in progress. Currently this section is empty.  Under this section, we have "Your Company's Open invitation. In this section you may find the current Solicitation that we are trying to acknowledge.  In the bottom of the page, you will find the "Quick Links" section. In this section you will have shortcuts to many of the often used features. 
4.	Point to the <b>Lines</b> object.  Let us review the line items of this RFQ. 
5.	Click the <b>Lines</b> link. 

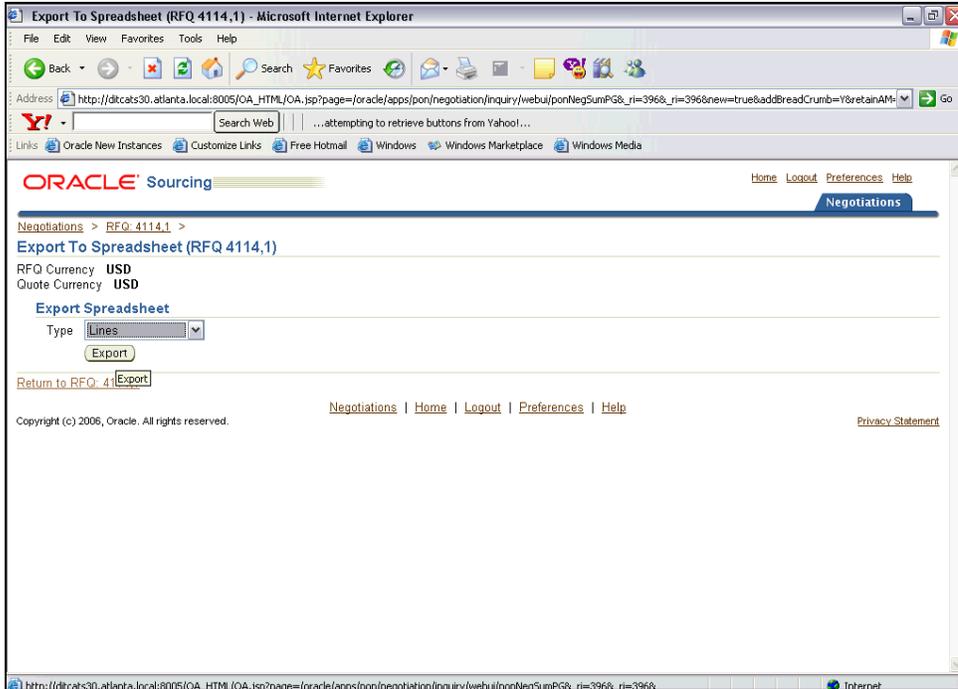


Step	Action
6.	<p>Click the <b>Actions</b> list.</p> <p>As you may have noticed, that this RFQ has a larger number of items than the one that we saw in the previous exercise. (Usually the number of items would be a lot more than this example as well).</p> <p>Let us learn to browse these lines in a much easier format.</p> <p><input type="button" value="Acknowledge Participation"/></p>
7.	<p>Click the <b>Export to Spreadsheet</b> list item.</p> <p>The application allows suppliers to export the line items to a spreadsheet making it easier for the suppliers to work with the requested items.</p> <p>Suppliers can work on the spreadsheet independently and once they are done creating the responses and pricing sheet, the application will then allow them to upload their spreadsheet as responses to the RFQ.</p> <p><input type="button" value="Export to Spreadsheet"/></p>

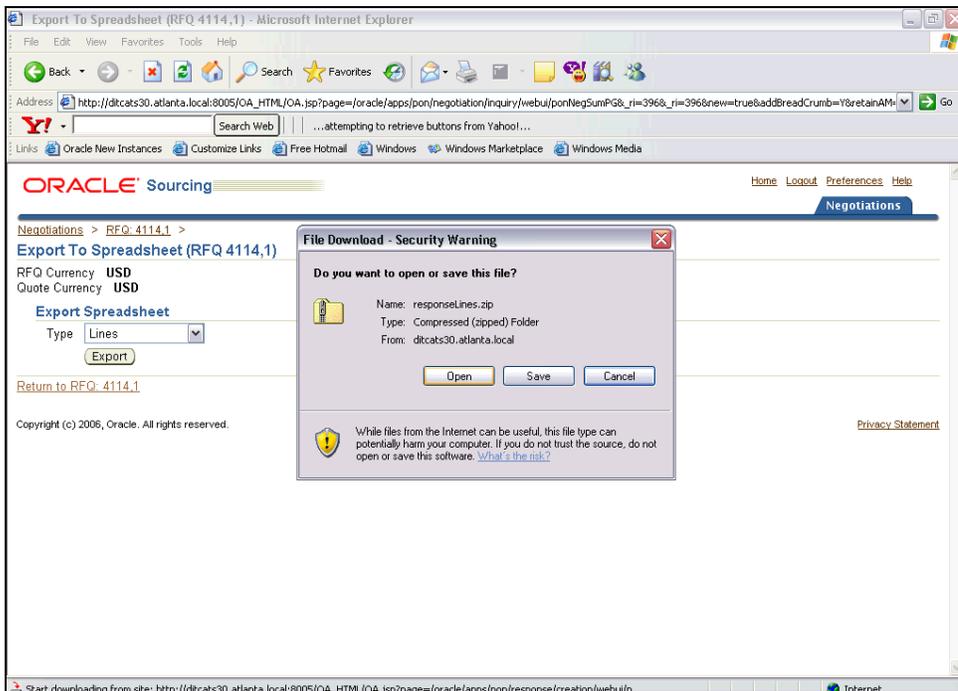
Step	Action
8.	<p>Click the <b>Go</b> button.</p> <p><b>CAUTION:</b></p> <p>If you are planning to import the spreadsheet as your response then:</p> <ol style="list-style-type: none"> <li>1. DO NOT ALTER the order of the columns (if you are planning to import the spreadsheet back).</li> <li>2. DO NOT ALTER contents of the column titled "* End of line delimiter".</li> <li>3. DO NOT ALTER the header row.</li> </ol> <p><input type="button" value="Go"/></p>



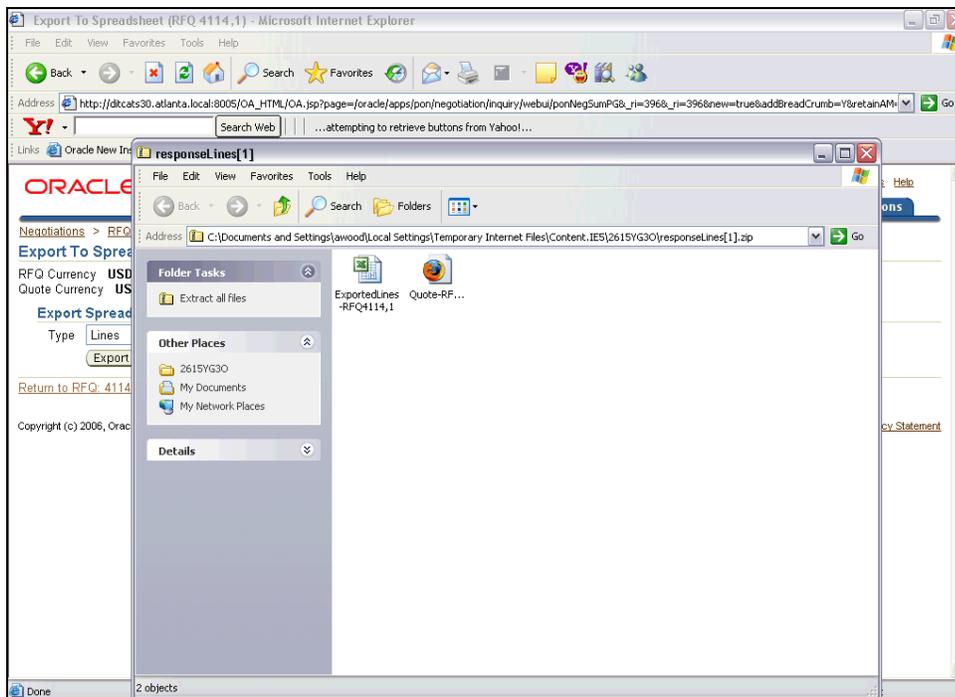
Step	Action
9.	<p>Click the object.</p> <p><input type="text" value="Lines"/></p>



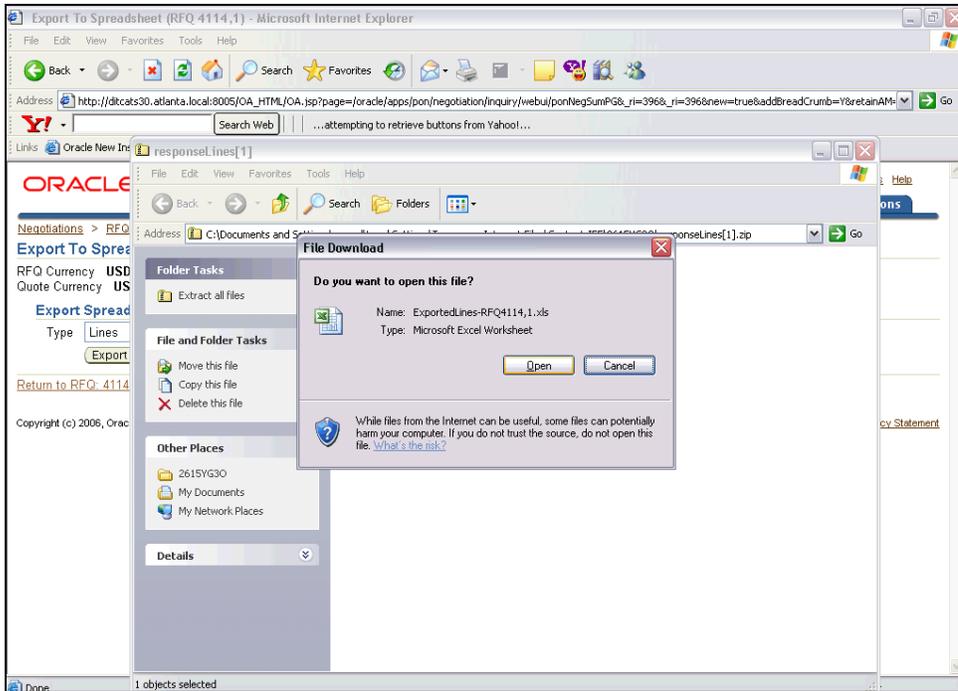
Step	Action
10.	Click the <b>Export</b> button. 

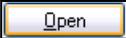


Step	Action
11.	<p>Click the <b>Open</b> button.</p> <p>You may require an unzip software for this.</p> <p>If you are using Microsoft XP and above, then this is a built-in capability.</p> 
	<p><i>or</i></p> <p>Press <b>[Alt+O]</b>.</p>



Step	Action
12.	Click the <b>ExportedLines-RFQ4114,1</b> list item.
13.	Press <b>[Enter]</b> .



Step	Action
14.	Click the <b>Open</b> button.  <i>or</i> Press <b>[Alt+O]</b> .
15.	<b>End of Procedure.</b>

## How to create an RFQ/RFI response

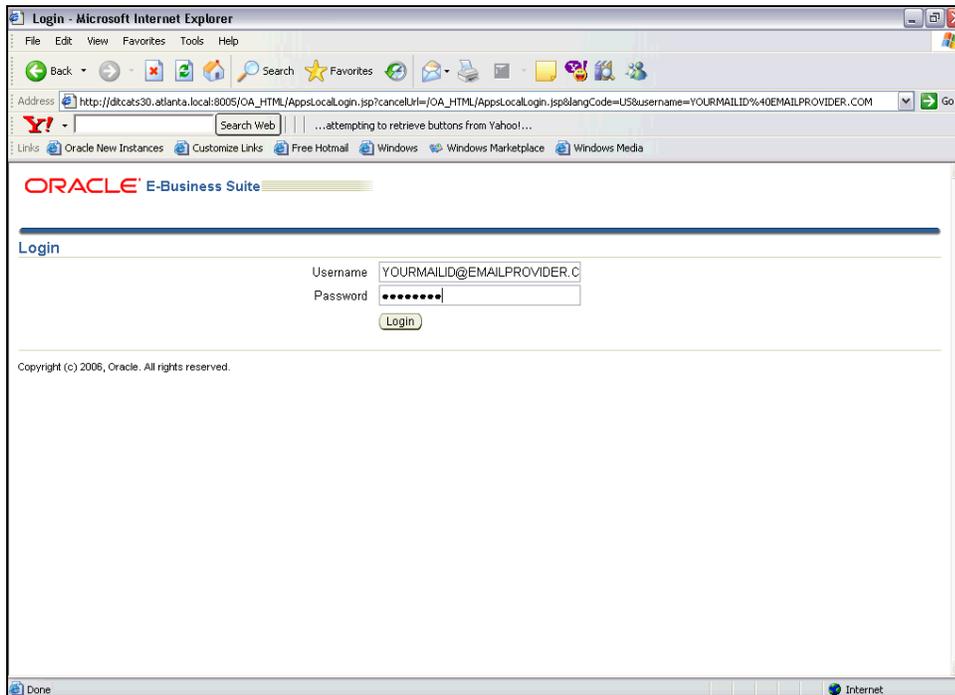
*How to create and RFQ/RFI response?*

### Procedure

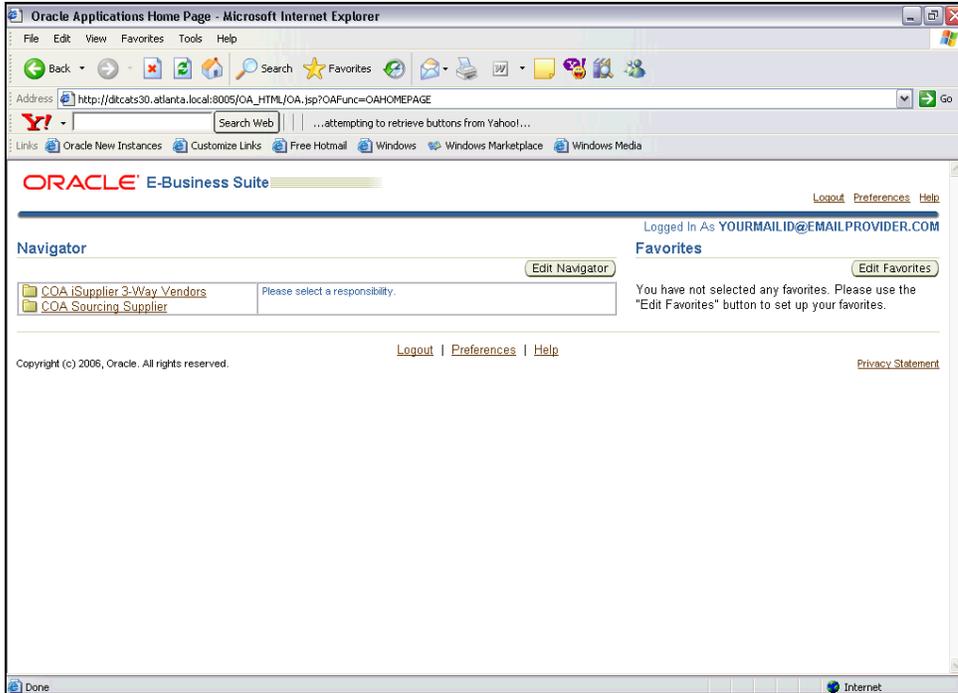
By the end of this exercise, you will be able to submit a response to a City's solicitation online.

In this exercise, we are going to learn the following:

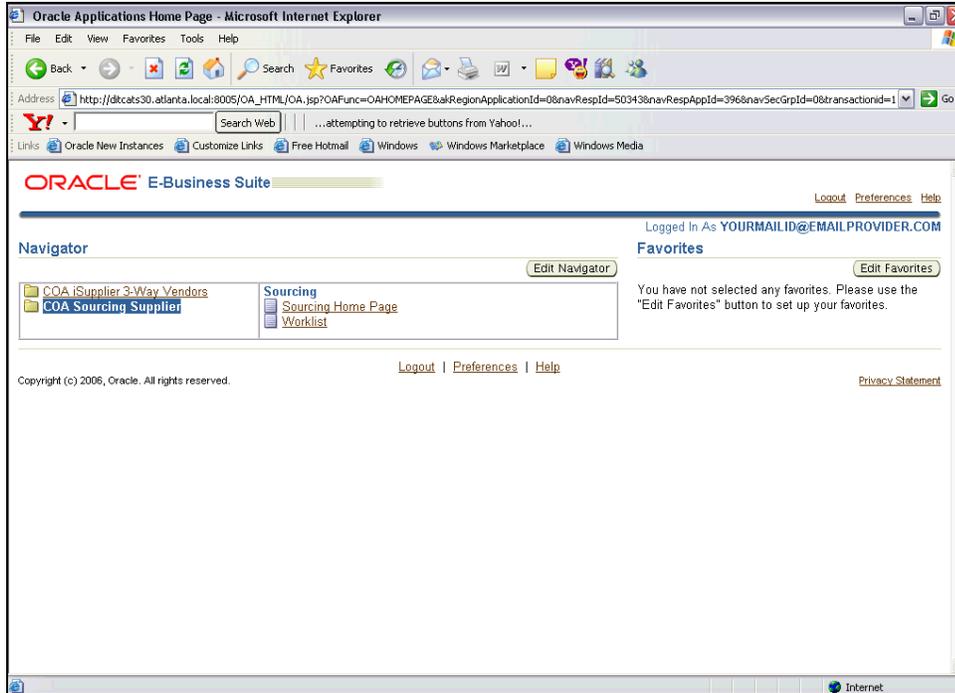
1. Create quote
2. Manage Draft Quote
3. Add Attachments
4. Submit Quote



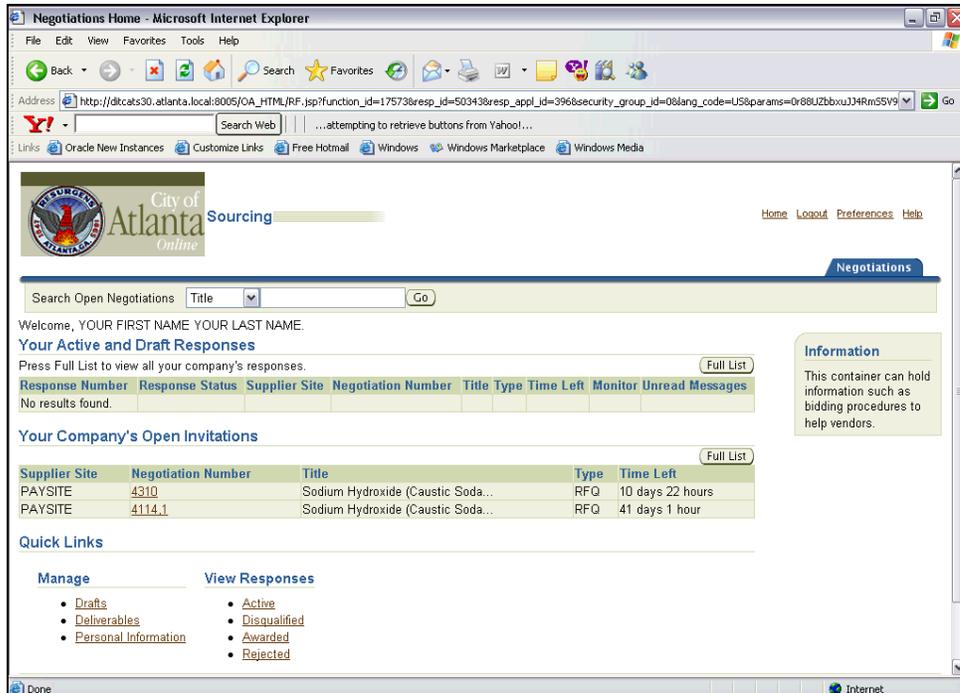
Step	Action
1.	Click the <b>Login</b> button. 



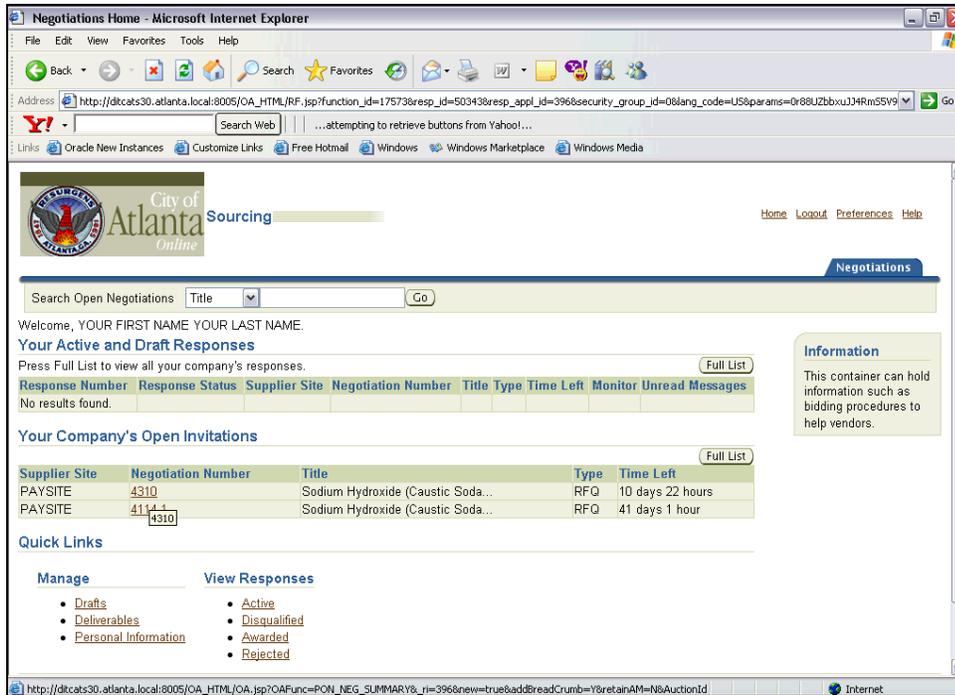
Step	Action
2.	Point to the <b>COA Sourcing Supplier</b> object. <u>COA Sourcing Supplier</u>
3.	Click the <b>COA Sourcing Supplier</b> link. <u>COA Sourcing Supplier</u>



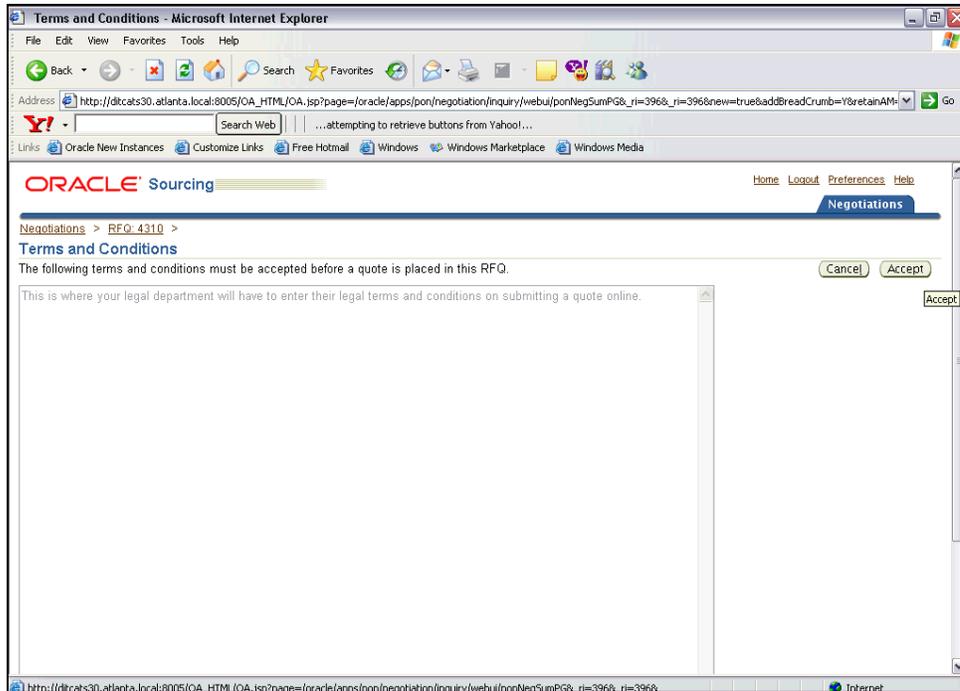
Step	Action
4.	Point to the <b>Sourcing Home Page</b> object. <a href="#">Sourcing Home Page</a>
5.	Click the <b>Sourcing Home Page</b> link. <a href="#">Sourcing Home Page</a>



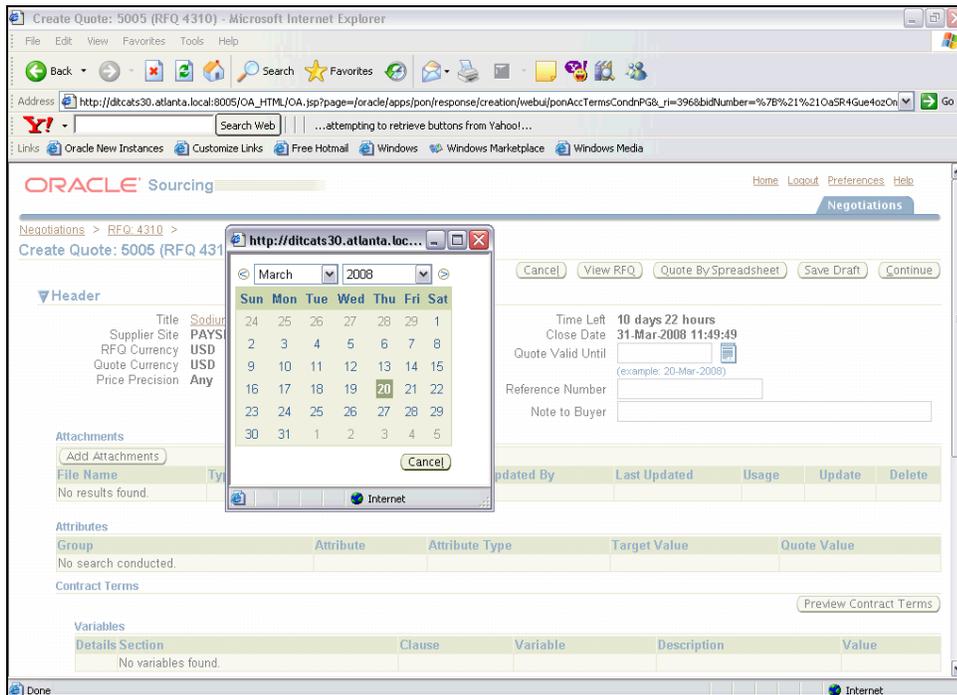
Step	Action
6.	<p>Point to the <b>4310</b> object.</p> <p>Let us take a brief moment to explore this Sourcing Home Page.</p> <p>The first section is "Your Active and Draft responses". In this section you may find all your responses that are active or in progress. Currently this section is empty.</p> <p>Under this section, we have "Your Company's Open invitation. In this section you may find the current Solicitation that have not been acknowledged/resopnded yet.</p> <p>In the bottom of the page, you will find the "Quick Links" section. In this section you will have shortcuts to many of the often used features.</p> <p><b>4310</b></p>



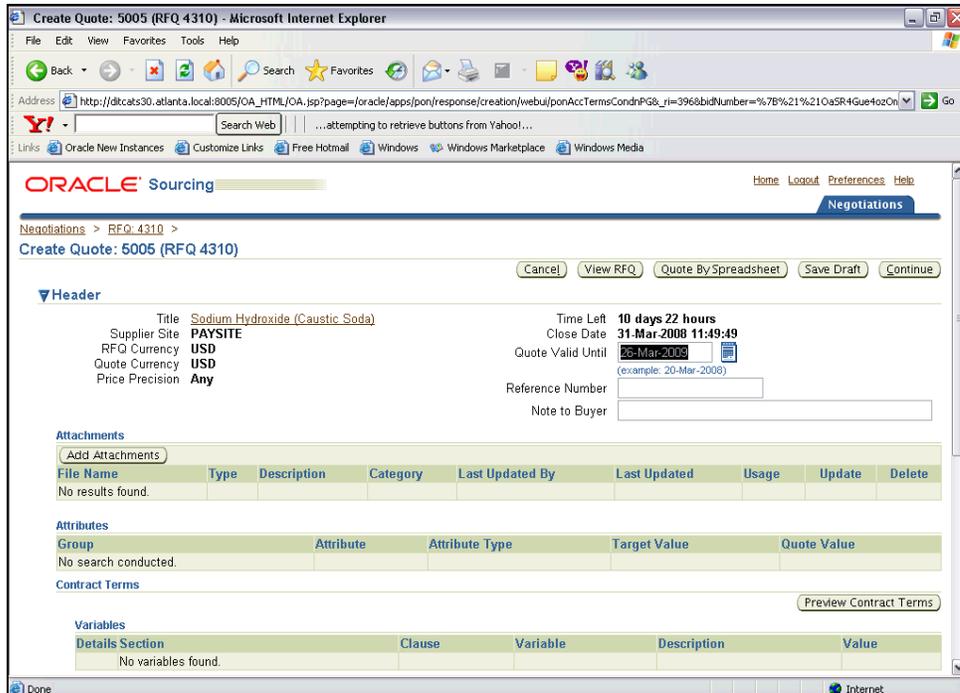
Step	Action
7.	<p>Click the <b>4310</b> link.</p> <p>Let us respond to RFQ 4310.</p> <p>Click the RFQ number to open the document.</p> 
8.	<p>Click the <b>Create Quote</b> list item.</p> <p>Choose Create Quote from the Actions list.</p> 
9.	<p>Click the <b>Go</b> button.</p> 



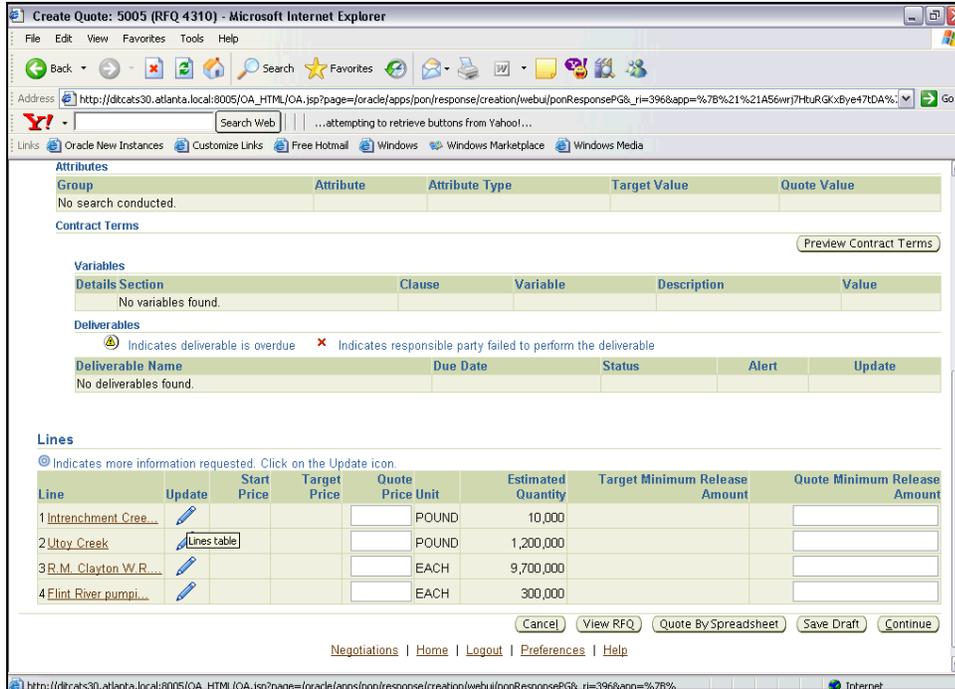
Step	Action
10.	<p>Click the <b>Accept</b> button.</p> <p>You have to accept the City's Terms &amp; Conditions before responding to the RFQ.</p> <p>This Terms &amp; Conditions are in addition to the Terms &amp; Conditions specified in the solicitation document.</p> 
11.	<p>Point to the <b>(example: 20-Mar-2008)</b> object.</p> <p>You may let the City know how long this response is valid.</p> <p>While the execution of a contract will hold the Contractual price for the contract's duration, this date is to let the City know, how long you will hold this price before the City makes a decision. In some solicitations, the City might dictate the minimum number of days that you might require to hold the Quote.</p> <p>Nevertheless, it will be a good practice for you to let the City know this information.</p> 
12.	<p>Click the <b>(example: 20-Mar-2008)</b> button.</p> <p>Please make sure that your Popup blocker is turned off.</p> 



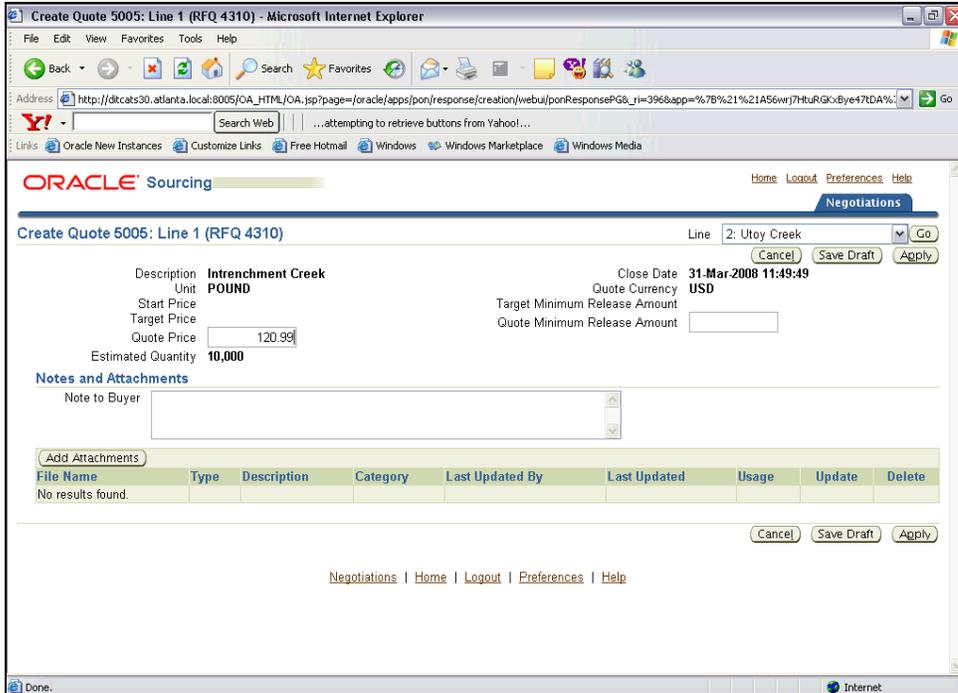
Step	Action
13.	<p>Click the <b>26</b> link.</p> <p>Choose the quote date from the popup window.</p> <p><b>20</b></p>



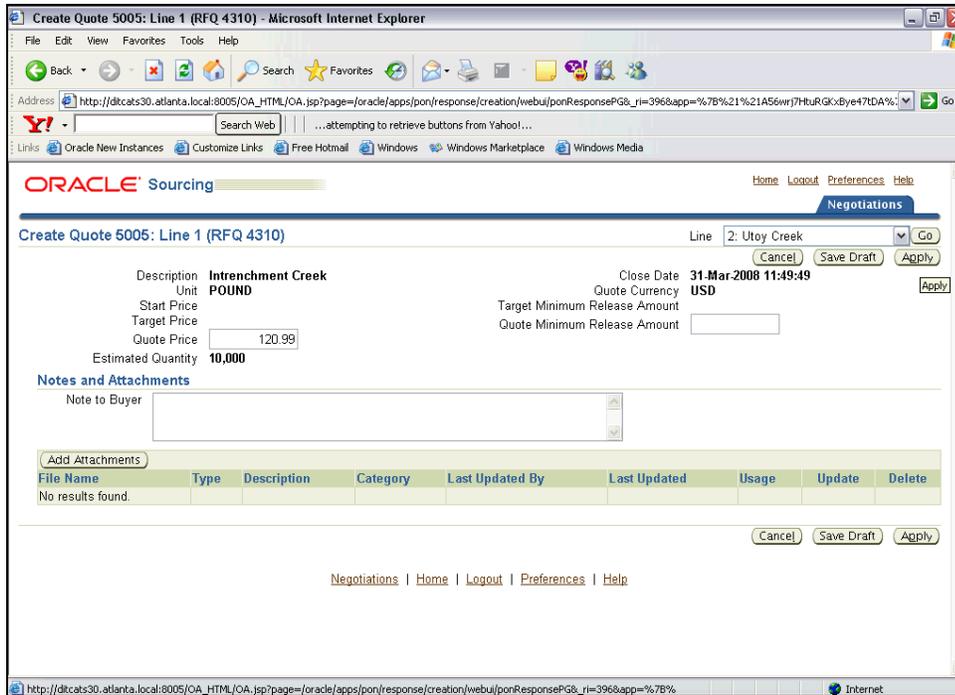
Step	Action
14.	<p>Enter the desired information into the <b>Reference Number</b> field. Enter "<b>YOUR INTERNAL REFERENCE NUMBE#</b>".</p> <p>If you are tracking it by any internal reference number, you may input that for your reference.</p>
15.	<p>Enter the desired information into the <b>Note to Buyer</b> field. Enter "<b>YOUR NOTE TO BUYER</b>".</p> <p>If you want to let the City know about anything with respect to your quote, then you may do so here.</p>



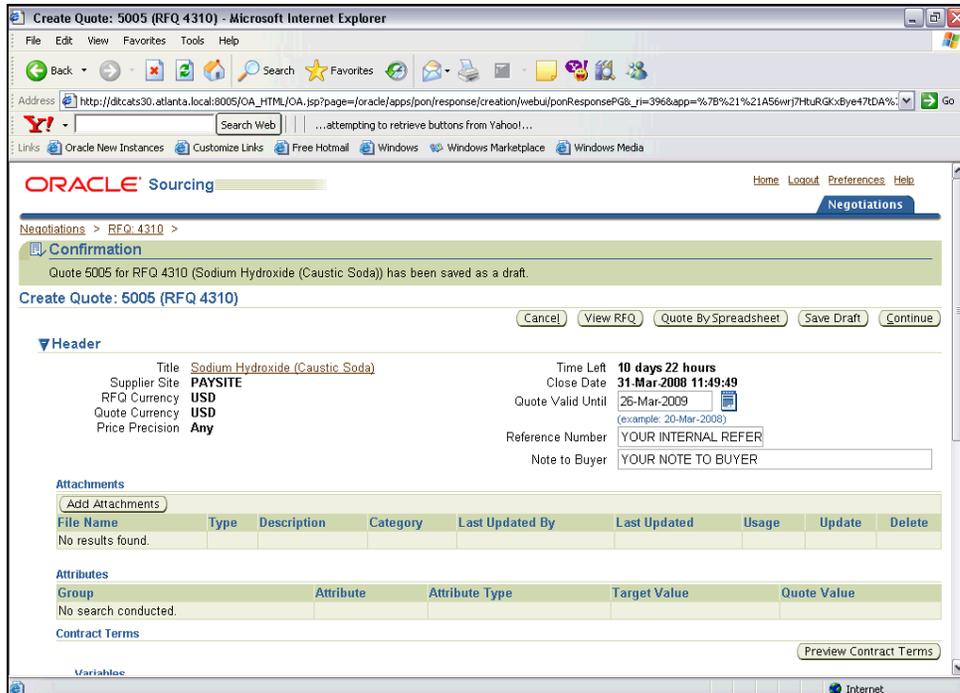
Step	Action
16.	<p>Click the <b>Update</b> button.</p> <p>You may click on the Update pencil icon to view the line details before quoting.</p> 



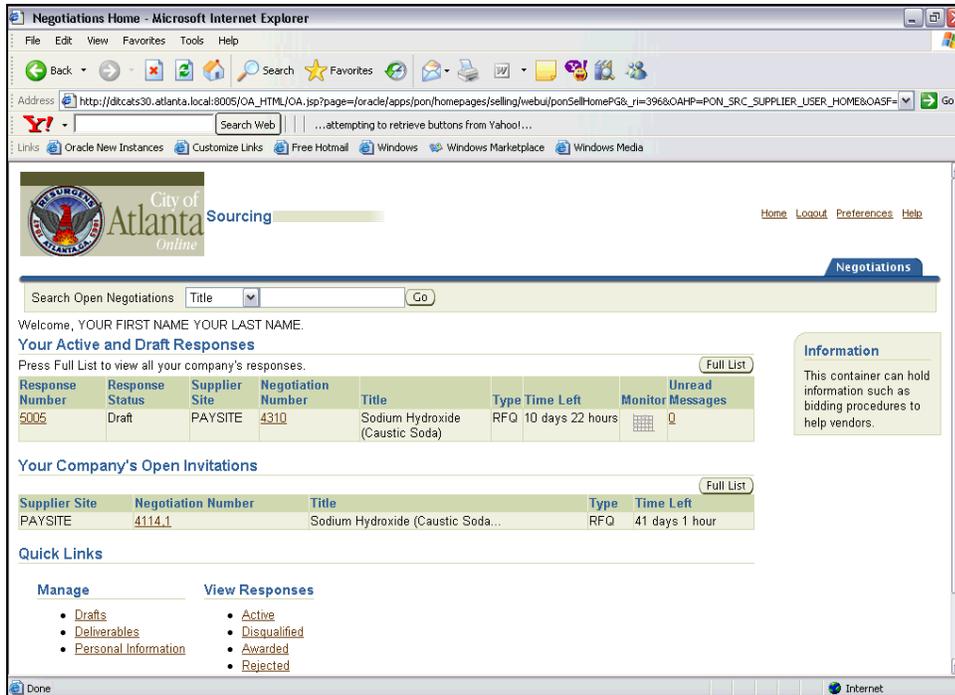
Step	Action
17.	<p>Point to the object.</p> <p>You may enter the quote price in this page by entering your value in the Quote Price field.</p> <p>You may quote for the other lines by choosing other lines from the box shown.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">             2: Uttoy Creek             <span style="float: right;">▼</span> </div>



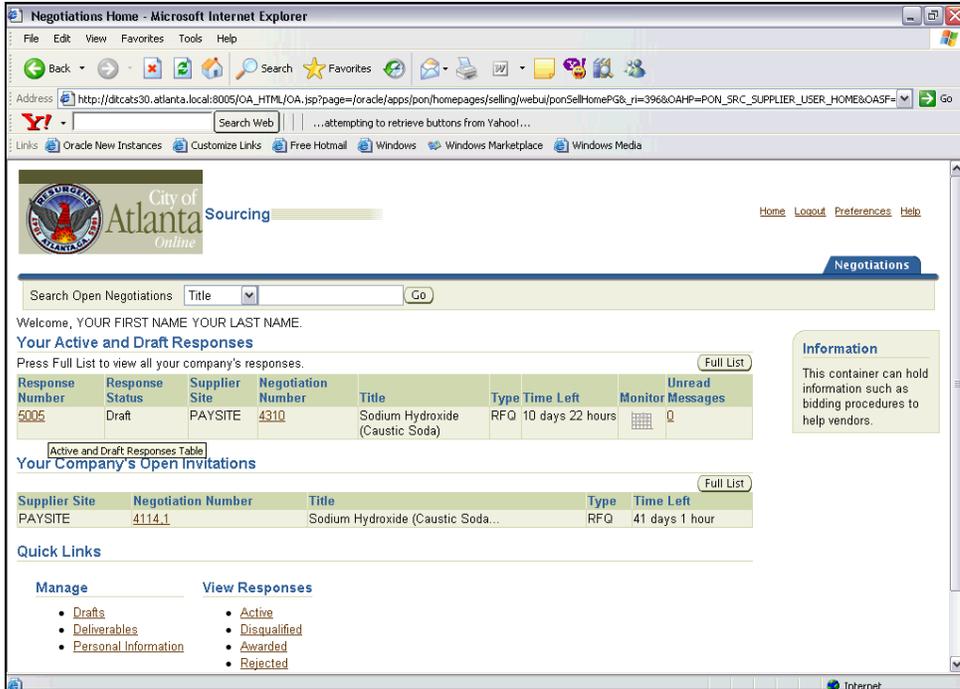
Step	Action
18.	Click the <b>Apply</b> button. 
19.	Enter the desired information into the <b>EACH</b> field. Enter " <b>22.99</b> ". You can submit your price in this page itself as shown here.
20.	Enter the desired information into the <b>EACH</b> field. Enter " <b>18.99</b> ".
21.	Point to the <b>Save Draft</b> object.  Usually, we may not be able to finish responding to a solicitation in one sitting. It is therefore necessary for us to have the ability to save our work as a draft and continue later from where we left off.  We are now going to demonstrate that.  Let us first save our work by clicking Save as Draft button. 
22.	Click the <b>Save Draft</b> button. 



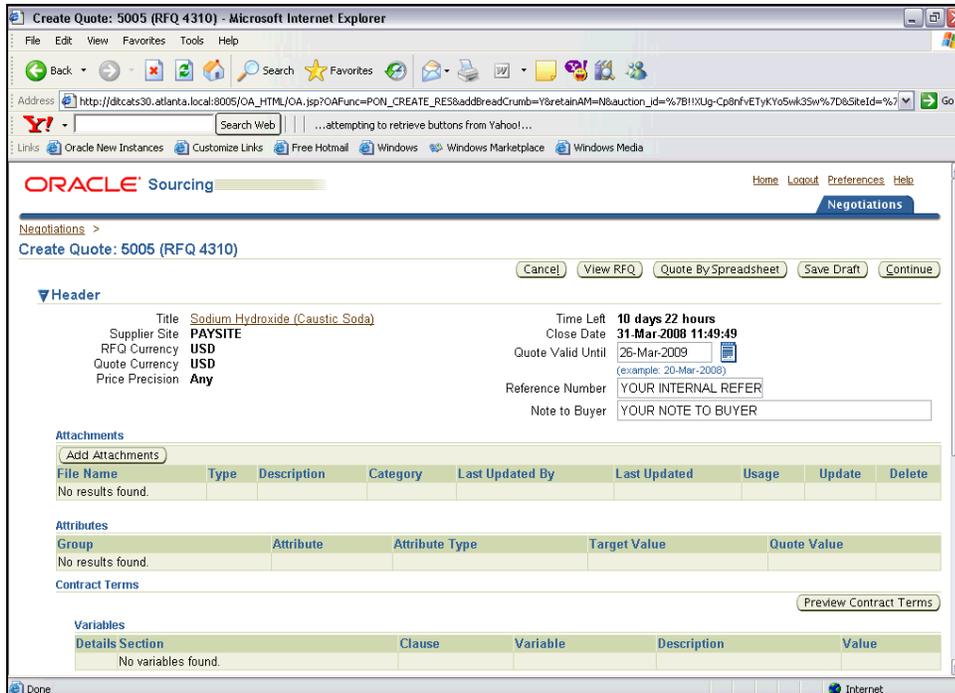
Step	Action
23.	<p>Point to the <b>Confirmation</b> object.</p> <p>Make sure you get this confirmation message before proceeding.</p> <p>It is also a good habit to save our work periodically, just in case.</p> <p>Let us take a break from responding by going away from this page.</p> <p>Let us click on the Negotiations Tab to go to the Sourcing Home Page.</p> <p><b>Confirmation</b></p>

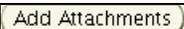


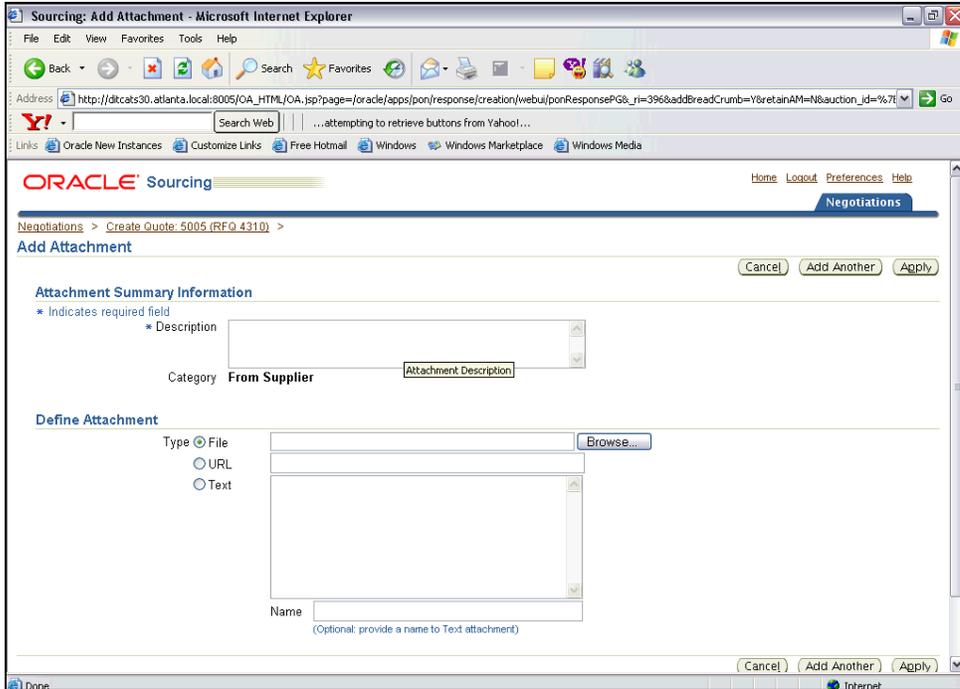
Step	Action
24.	<p>Point to the <b>Negotiations</b> object.</p> <p>We are now back to the Sourcing Home Page.</p> <p>If you now notice, our draft response is on under the section "Your Active and Draft Responses".</p> <p>You may also notice that the RFQ 4310 is moved out of "Your Company's Open Invitations" section. This is because, we are currently drafting a response for this RFQ and therefore it is no longer considered Open invitation.</p> 



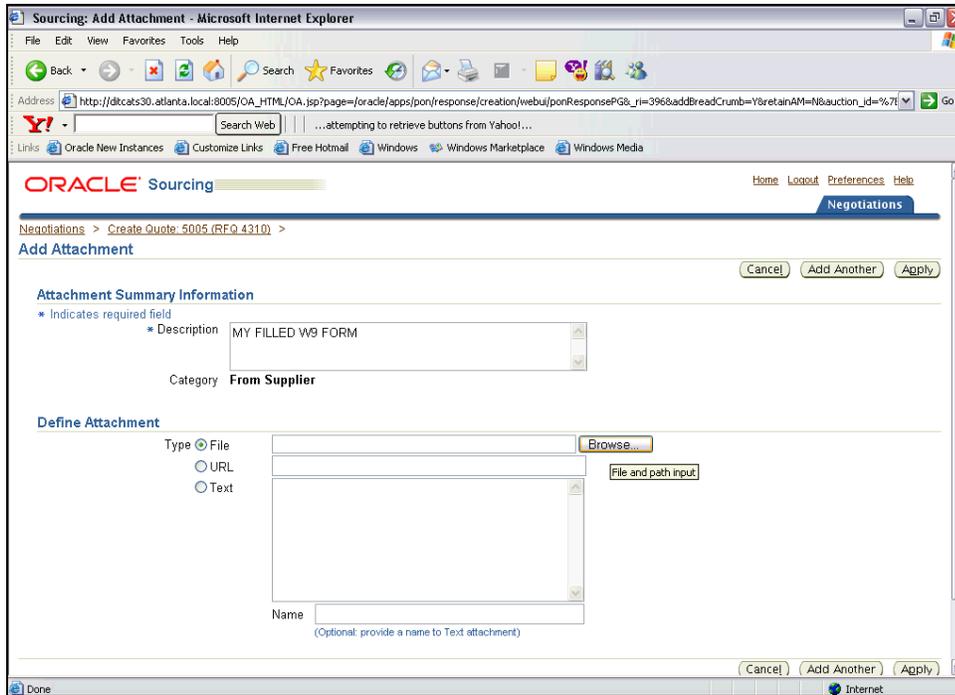
Step	Action
25.	<p>Click the <b>5005</b> link.</p> <p>Let us pickup our response from where we left off.</p> <p>Click on the Response Number to open.</p> <p><b>5005</b></p>

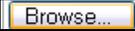


Step	Action
26.	<p>Point to the <b>Add Attachments</b> object.</p> <p>Once the response opens, you may notice that the response is in the same state of where we left it.</p> <p>We are now going to learn to how to upload a file attachment as a part of our response.</p> <p>You may remember, that as a part of the Solicitation, City has asked the suppliers to submit their W9 forms filled.</p> <p>We are now going to upload our filled W9 form as a file attachment.</p> <p></p>
27.	<p>Click the <b>Add Attachments</b> button.</p> <p>Click on the Add Attachments button to upload a file.</p> <p></p>

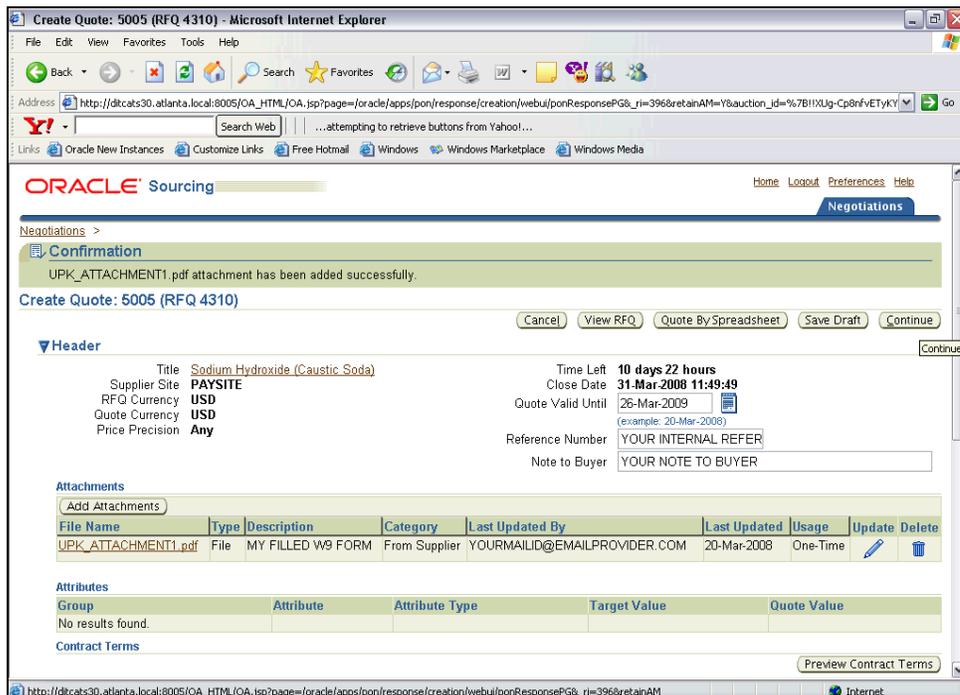


Step	Action
28.	<p>Enter the desired information into the <b>Description</b> field. Enter "<b>MY FILLED W9 FORM</b>".</p> <p>You are required to provide a brief description of what the file upload is about.</p> <p>In this case we are uploading our filled W9 form and that will be our description.</p>



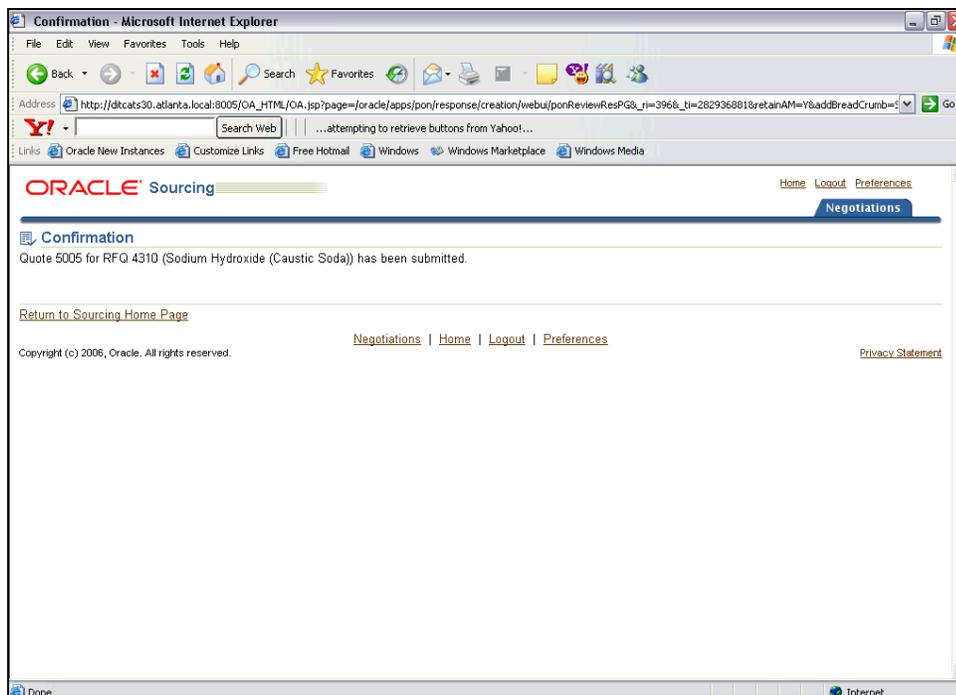
Step	Action
29.	Release the mouse button.
30.	Click the scrollbar.  Click on the Browse button to locate your file on your computer and upload. 
31.	Click the scrollbar.  Locate your filled W9 form file in your computer. 
32.	Enter the desired information into the <b>Name</b> field. Enter " <b>W9_VENDOR_SUBMITTAL</b> ".  Select your file and click Open to upload the file.  You may also give an optional name for better clarity.
33.	Point to the <b>Apply</b> object. 

Step	Action
34.	<p>Click the <b>Apply</b> button.</p> <p>You can click "Add Another" button to add more file attachments and follow the same process.</p> <p>Once you are done uploading all the files, you may click on the Apply button to save the changes.</p> <p></p>



Step	Action
35.	<p>Click the <b>Continue</b> button.</p> <p>You may now notice the uploaded file under Attachment Section.</p> <p>If you had uploaded multiple files, all the files will be listed in this section.</p> <p></p>

Step	Action
36.	<p>Point to the <b>Submit</b> object.</p> <p>You have now completed your pricing sheet and response.</p> <p>Please review your response before submitting the quote as some RFQs may not allow you to go back and alter your quotes.</p> <p></p>
37.	<p>Click the <b>Submit</b> button.</p> <p></p>



Step	Action
38.	<p>Point to the <b>Return to Sourcing Home Page</b> object.</p> <p>Please make sure that the confirmation message stating that your quote has been submitted is displayed.</p> <p></p>
39.	<p>Click the <b>Return to Sourcing Home Page</b> link.</p> <p></p>

Step	Action
40.	Contratulations.  You just learnt how to submit a quote online. <b>End of Procedure.</b>

## **How to import a response from a spreadsheet?**

### *How to import a response from a spreadsheet?*

In many cases, the number of solicited items will be such that it will be a lot easier to work on a spreadsheet than with going back and forth in the application.

In the "How to view RFQ Line" topic, we had already learnt how to export all the RFQ lines from a sourcing document to a spreadsheet. After exporting the lines, you may work on the spreadsheet independently and once you had compiled all your pricings, this exercise will teach you how to import the spreadsheet as your response.

### **CAUTION:**

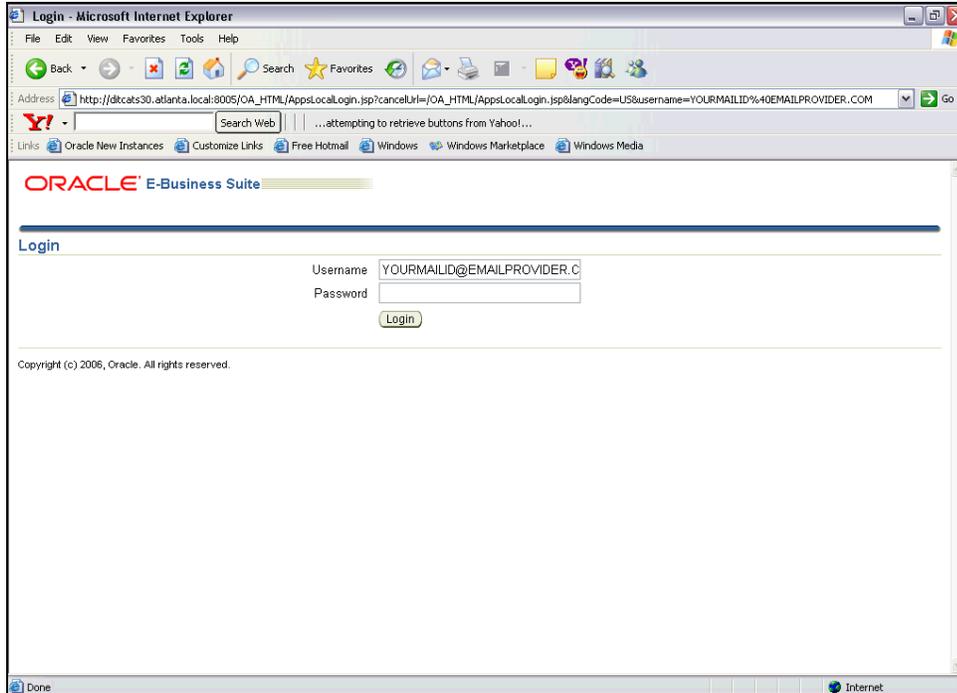
If you are planning to import the spreadsheet as your response then:

1. DO NOT ALTER the order of the columns (if you are planning to import the spreadsheet back).
2. DO NOT ALTER contents of the column titled "\* End of line delimiter".
3. DO NOT ALTER the header row.

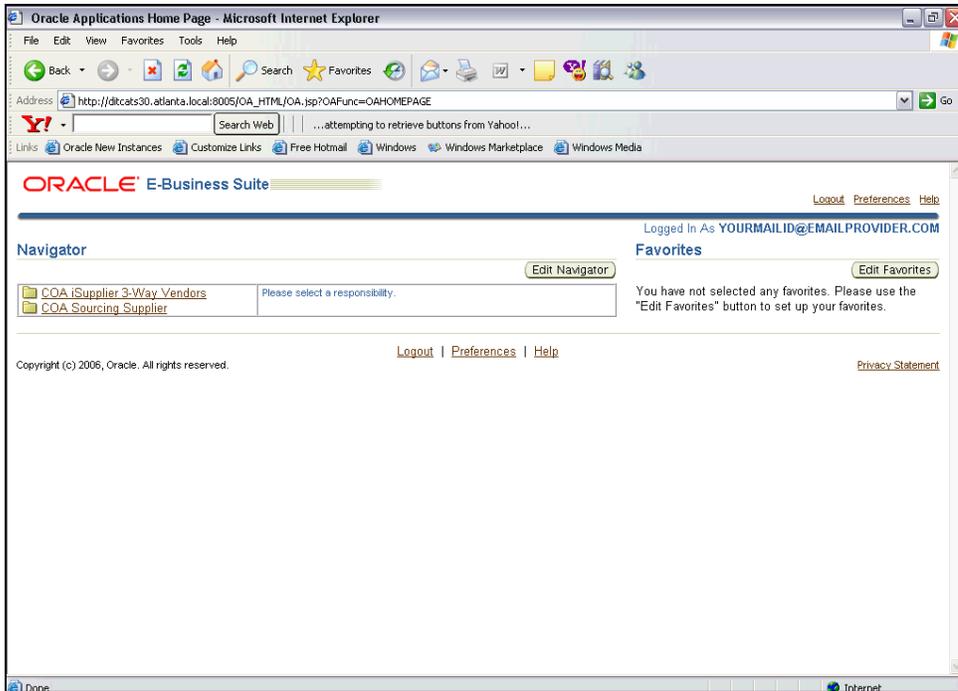
## **Procedure**

By the end of this exercise, you will be able to submit a response to a City's solicitation online.

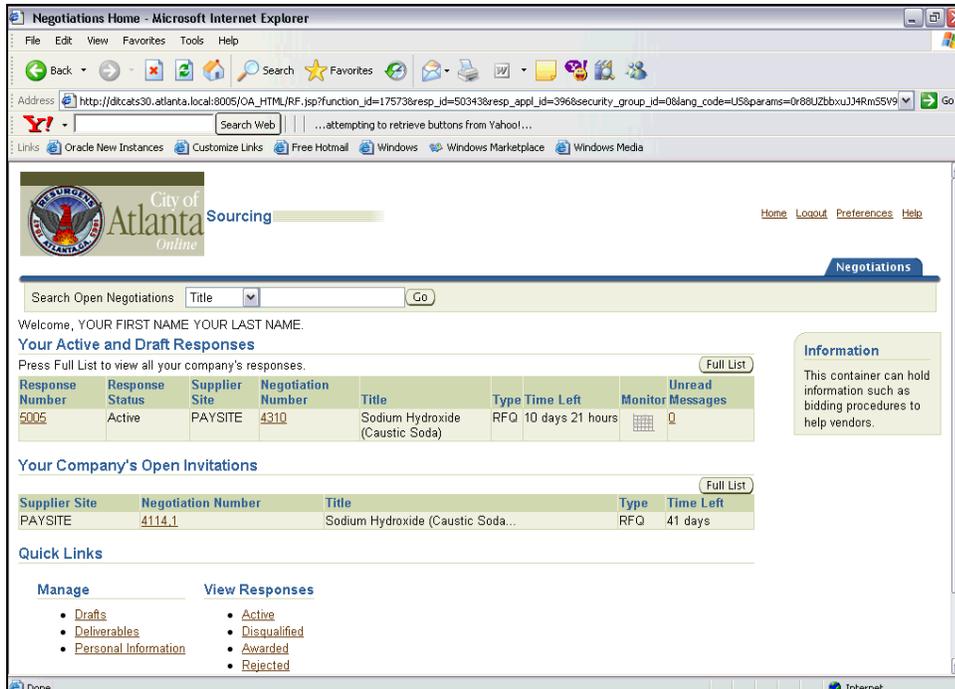
In this exercise, we are going to learn how to submit a quote by importing a spreadsheet.



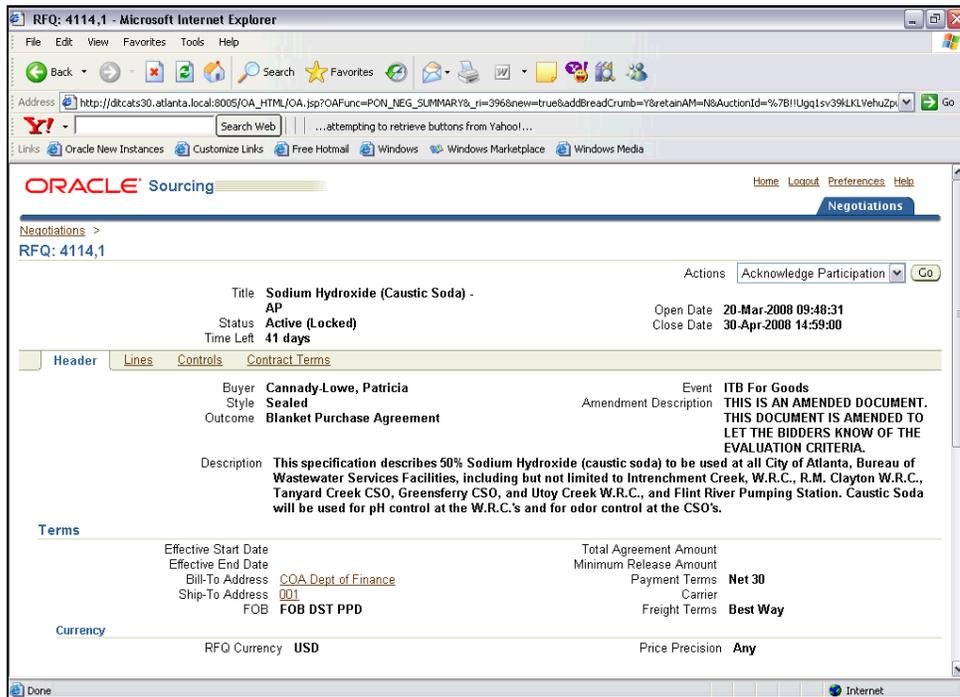
Step	Action
1.	Enter the desired information into the <b>Password</b> field. Enter " <b>welcome1</b> ".
2.	Click the <b>Login</b> button. 



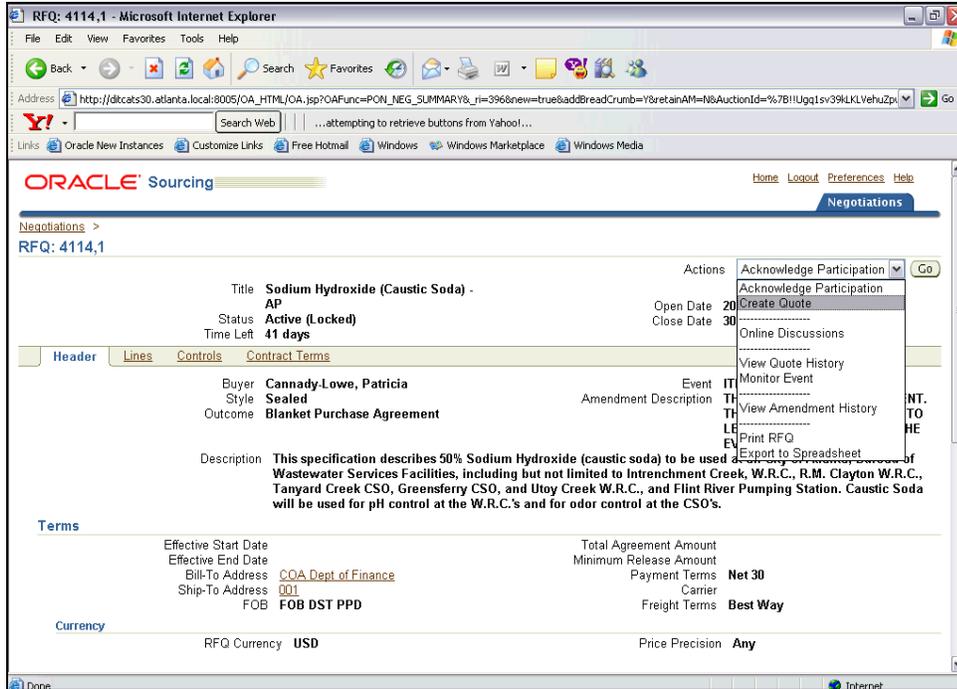
Step	Action
3.	Point to the <b>COA Sourcing Supplier</b> object. <a href="#">COA Sourcing Supplier</a>
4.	Click the <b>COA Sourcing Supplier</b> link. <a href="#">COA Sourcing Supplier</a>
5.	Click the <b>Sourcing Home Page</b> link. <a href="#">Sourcing Home Page</a>



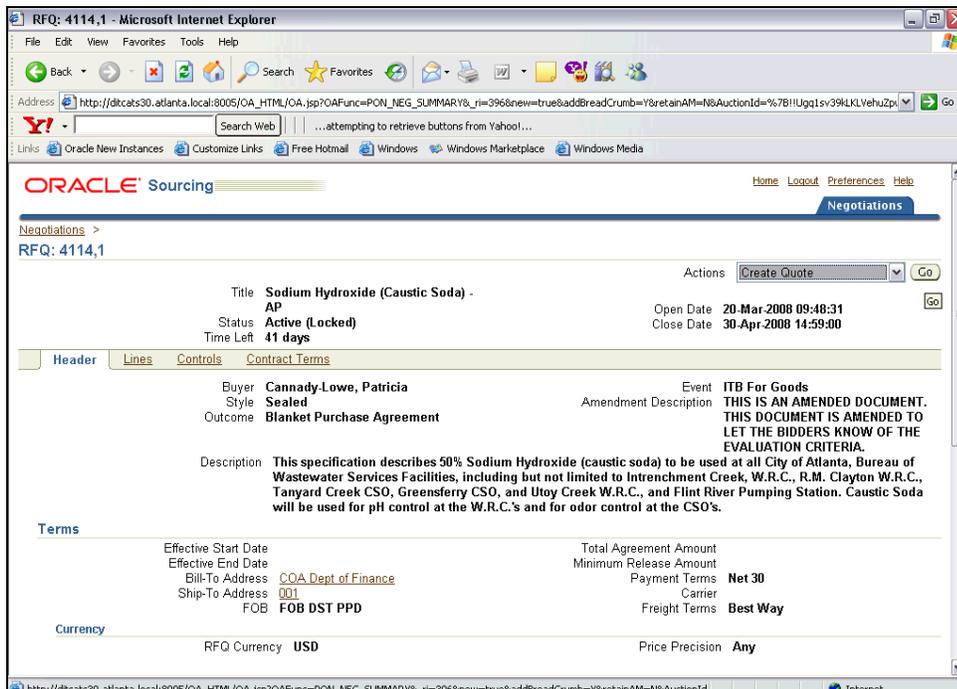
Step	Action
6.	<p>Point to the <b>4114,1</b> object.</p> <p>Let us take a brief moment to explore this Sourcing Home Page.</p> <p>The first section is "Your Active and Draft responses". In this section you may find all your responses that are active or in progress. Currently this section is empty.</p> <p>Under this section, we have "Your Company's Open invitation. In this section you may find the current Solicitation that have not been acknowledged/responded yet..</p> <p>In the bottom of the page, you will find the "Quick Links" section. In this section you will have shortcuts to many of the often used features.</p> <p><b>4114,1</b></p>
7.	<p>Click the <b>4114,1</b> link.</p> <p>Let us resopnd to 4114, 1.</p> <p>NOTE: This is an amended document as indicated by the " , 1".</p> <p>Comma (,) indicates that the document is amended and the number one (1) after the comma indicates the number of amendments that the document has gone through.</p> <p><b>4114,1</b></p>



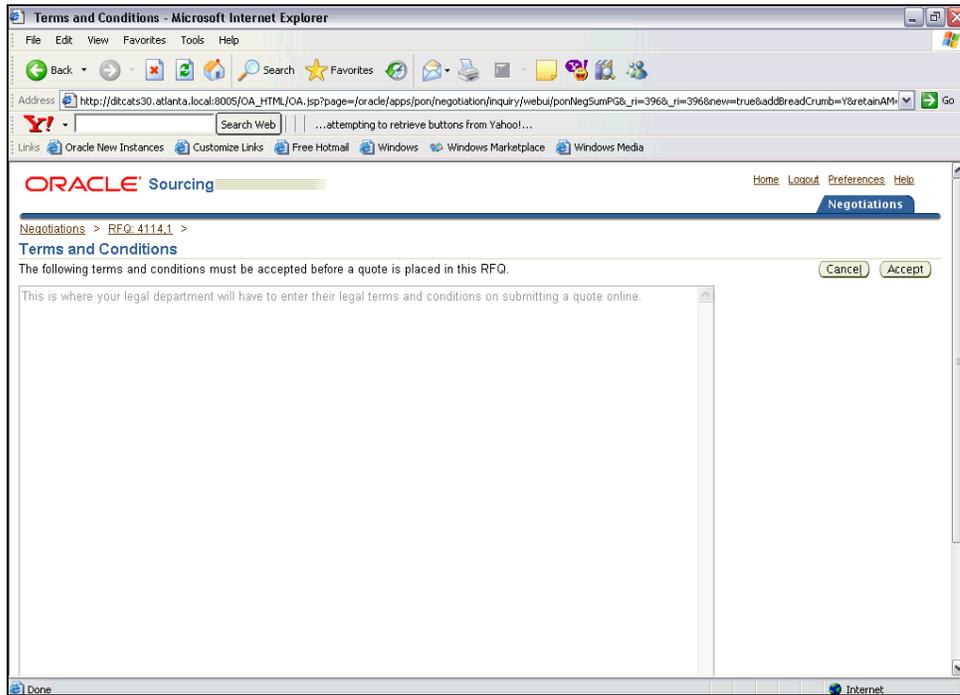
Step	Action
8.	<p>Click the <b>Actions</b> list.</p> <p>Since we had already acknowledged the amendments, we need not acknowledge it again. Otherwise, the application will force the supplier to acknowledge before submitting their quotes.</p> <p><input type="text" value="Acknowledge Participation"/> ▼</p>



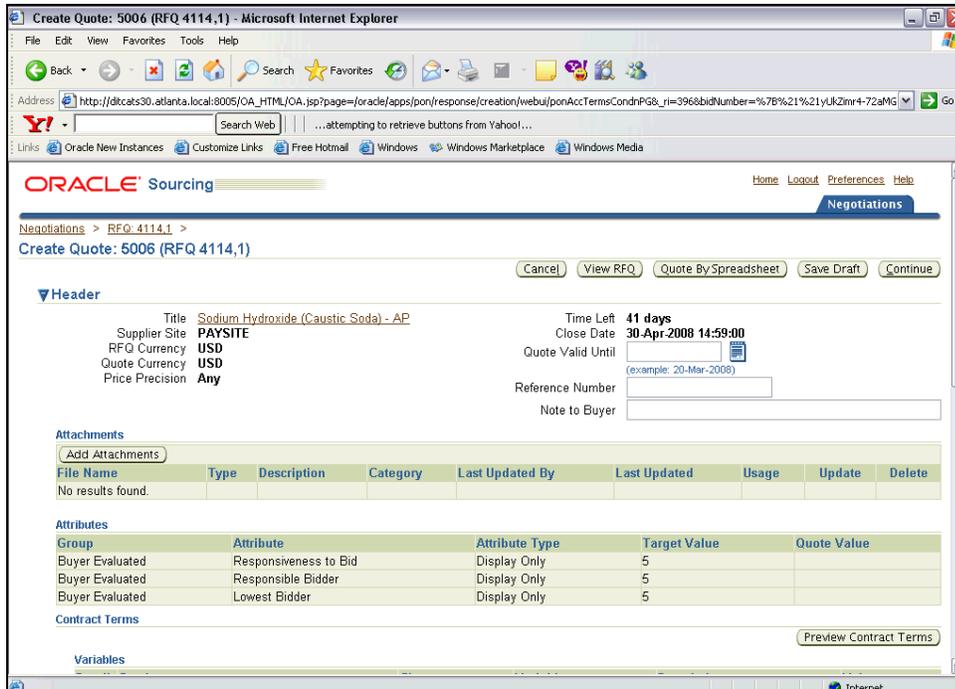
Step	Action
9.	Click the <b>Create Quote</b> list item. 



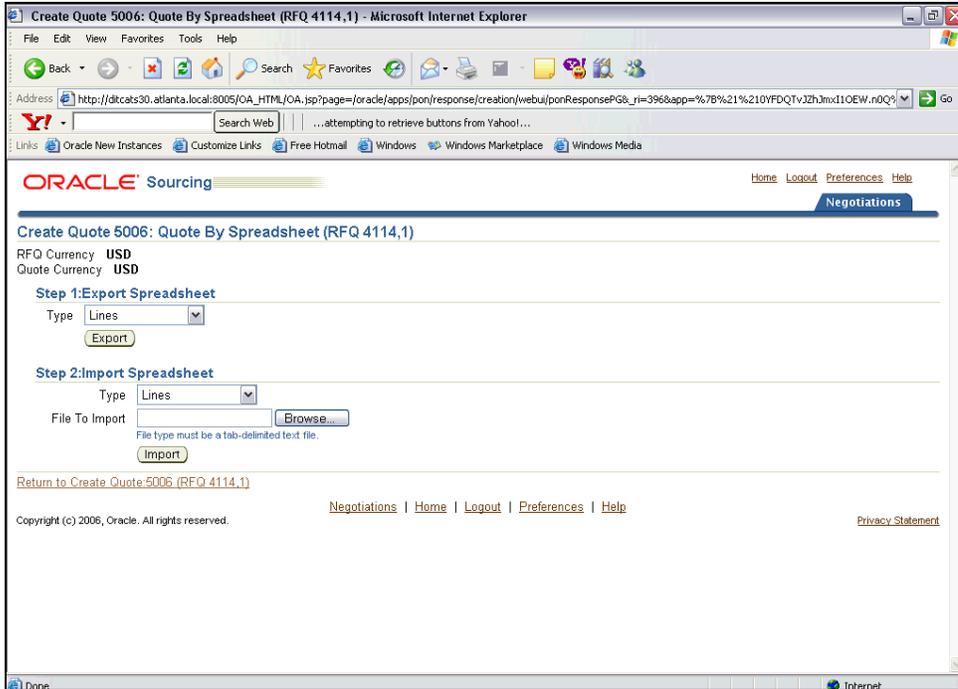
Step	Action
10.	Click the <b>Go</b> button. 

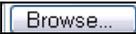
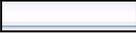


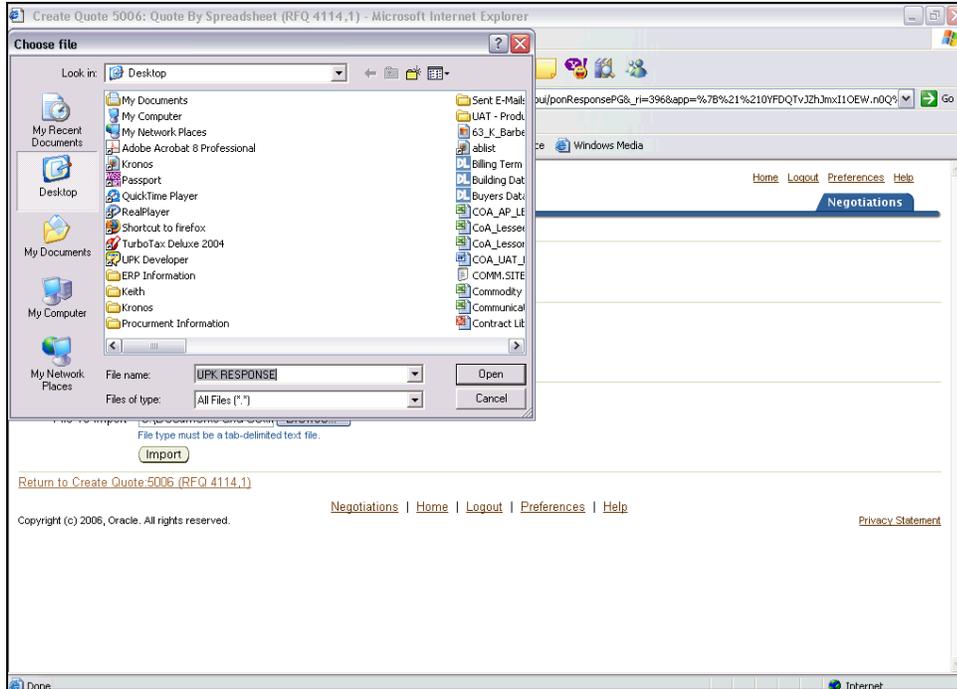
Step	Action
11.	Point to the <b>Accept</b> object.  You have to accept the City's Terms & Conditions before responding to the RFQ.  This Terms & Conditions are in addition to the Terms & Conditions specified in the solicitation document. 
12.	Click the <b>Accept</b> button. 



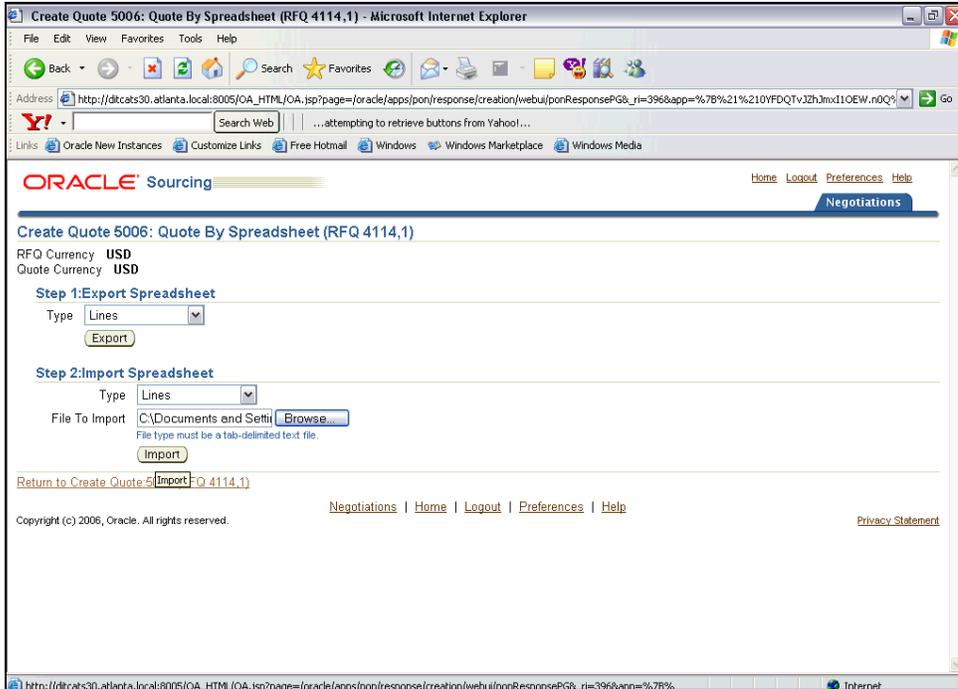
Step	Action
13.	<p>Point to the <b>Save Draft</b> object.</p> <p>In this exercise, we are not going to show you how all the intrinsic details of responding, as we had already seen that in the previous exercise.</p> <p>We are only going to focus on bringing the pricing sheet from your spreadsheet to the application.</p> <p></p>
14.	<p>Click the <b>Save Draft</b> button.</p> <p></p>



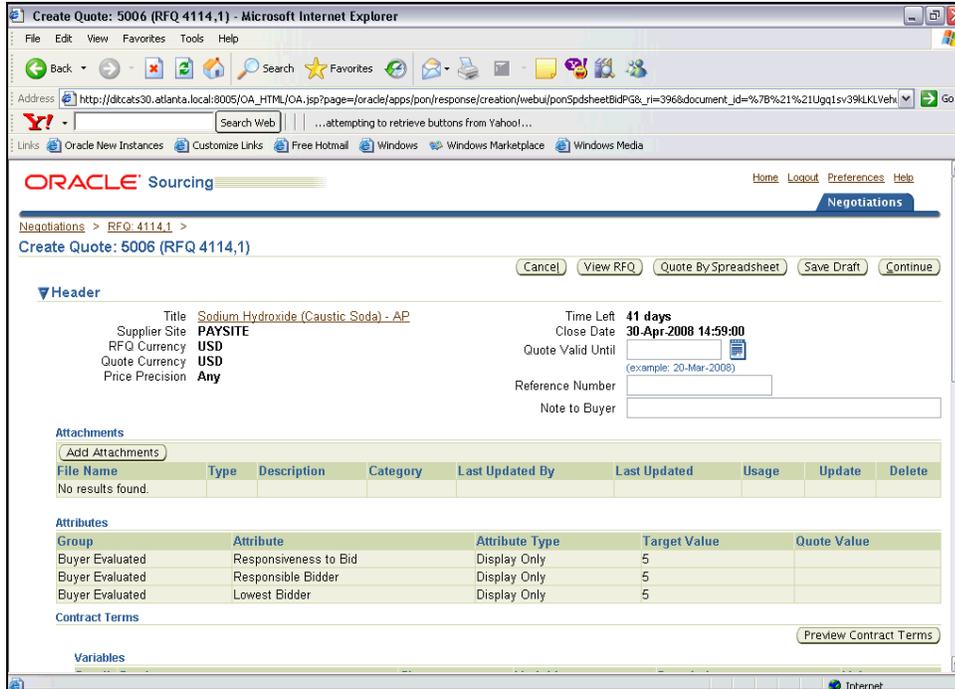
Step	Action
15.	Point to the object. Make sure you follow the rules mentioned as Caution on the topical essay. 
16.	Click the scrollbar. 
17.	Click the scrollbar. 

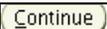


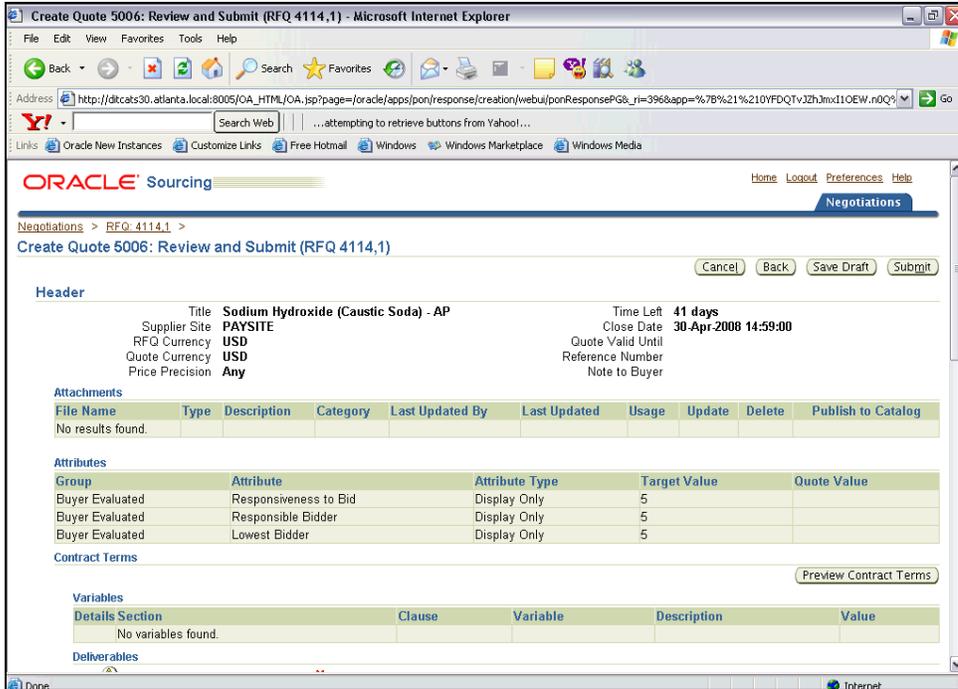
Step	Action
18.	Click the <b>Open</b> button. 
	or Press <b>[Alt+O]</b> .



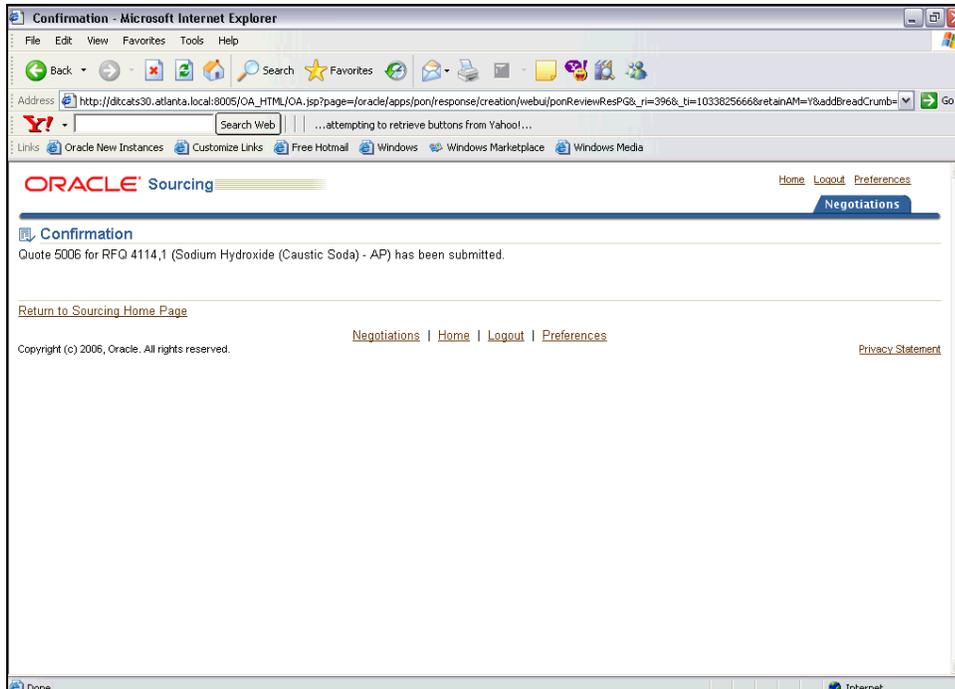
Step	Action
19.	<p>Click the <b>Import</b> button.</p> <p>If you had followed the directions and did not alter the column sequence or column header or the last column, you will be able to import your quote without any problems.</p> <p></p>



Step	Action
20.	Release the mouse button.  Let us scroll down to take a look at the imported pricing sheet.
21.	Point to the <b>Continue</b> object.  The spreadsheet has been imported successfully. 
22.	Click the <b>Continue</b> button. 



Step	Action
23.	Release the mouse button.
24.	Click the scrollbar.  Let us review our pricing sheet before submitting the quote.
25.	Click the <b>Submit</b> button. 



Step	Action
26.	Point to the <b>Return to Sourcing Home Page</b> object.  Make sure that you get the successful submission confirmation message before proceeding. <a href="#">Return to Sourcing Home Page</a>
27.	Click the <b>Return to Sourcing Home Page</b> link. <a href="#">Return to Sourcing Home Page</a>
28.	<b>End of Procedure.</b>

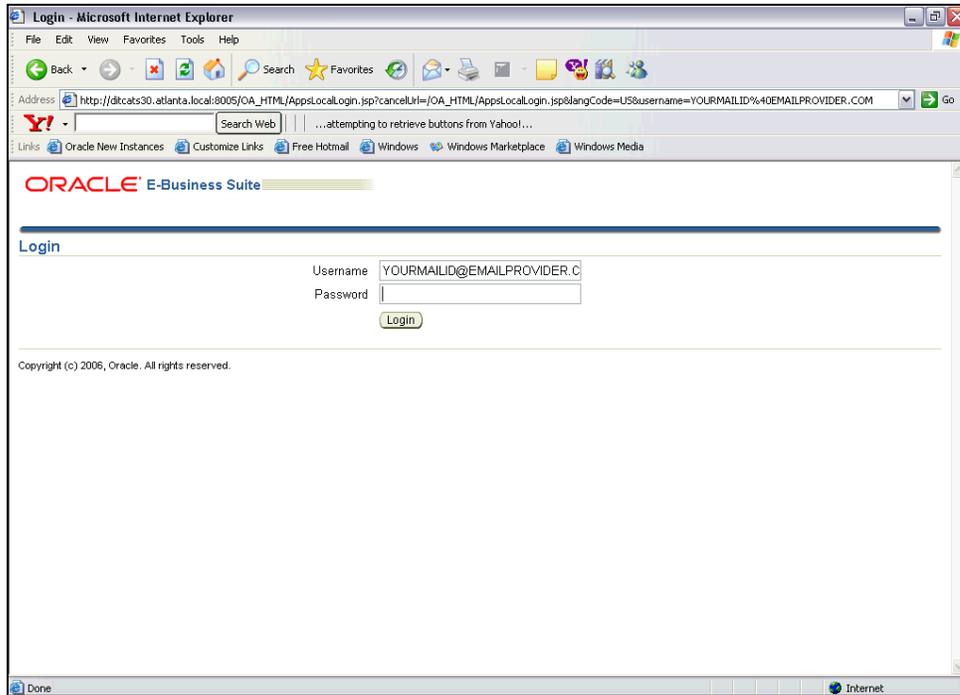
## How to do Instant Messaging with the Buyers?

### *How to do Instant Messaging?*

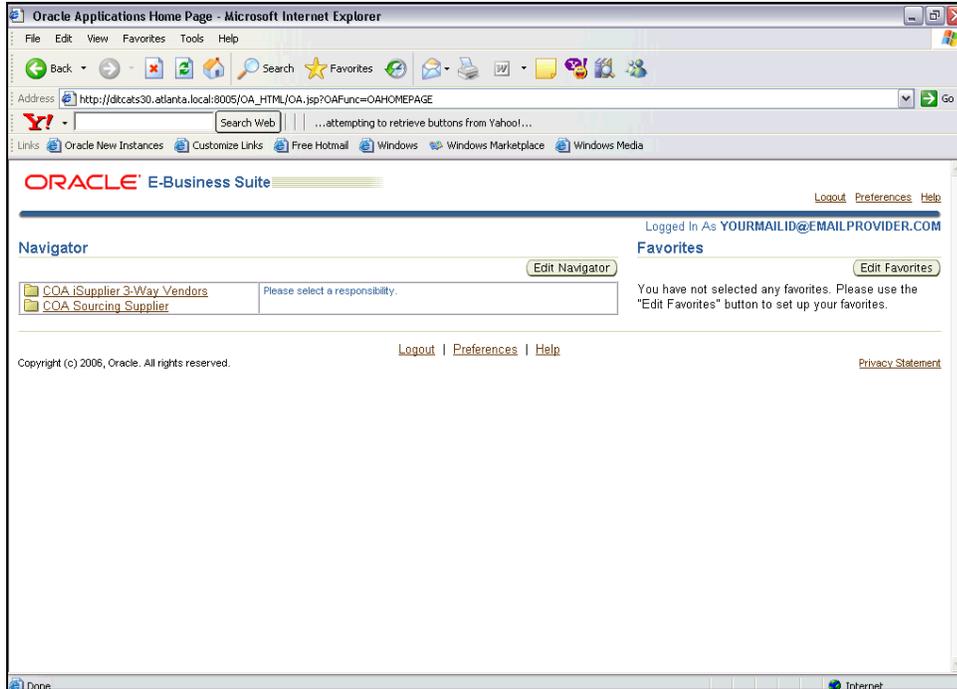
While working on a RFQ, you may need some additional clarity or may have a question or concern with the document. In those cases, you may use this instant messaging feature to communicate with the City.

All communications through this channel are recorded and are associated to the corresponding sourcing event. The City prefers this mode of communication over telephone/fax/email for the same reason.

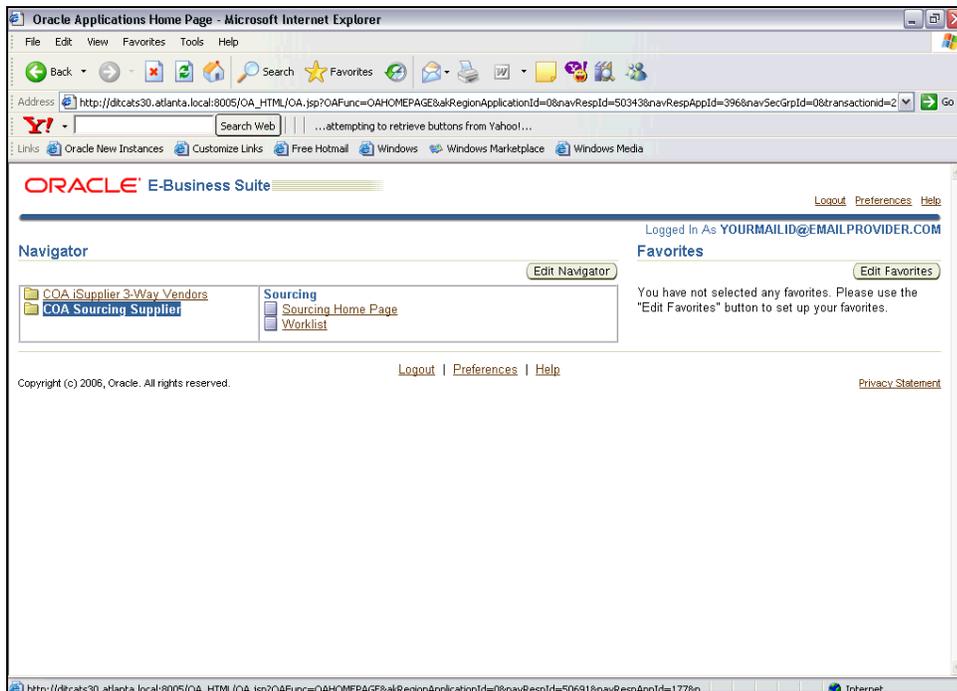
## Procedure



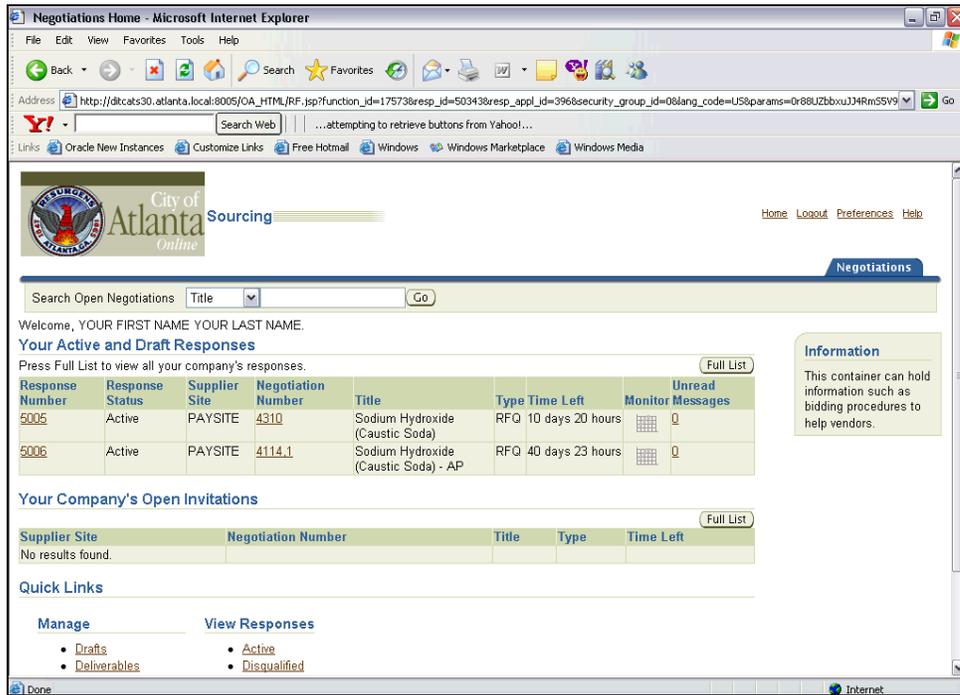
Step	Action
1.	Enter the desired information into the <b>Password</b> field. Enter " <b>welcome1</b> ".
2.	Click the <b>Login</b> button. 



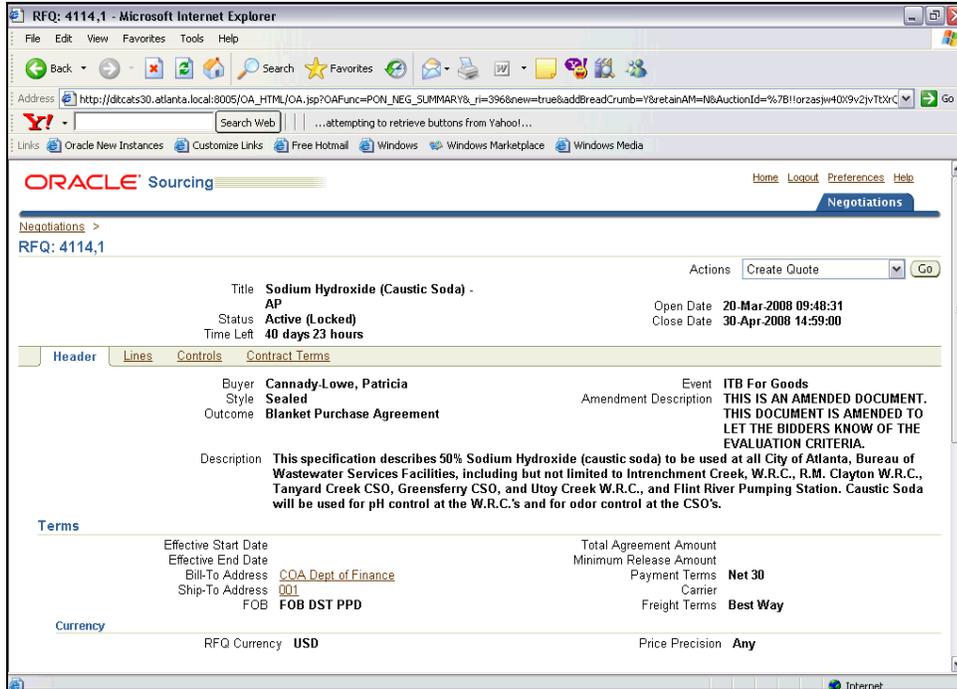
Step	Action
3.	Click the <b>COA Sourcing Supplier</b> link. <u>COA Sourcing Supplier</u>



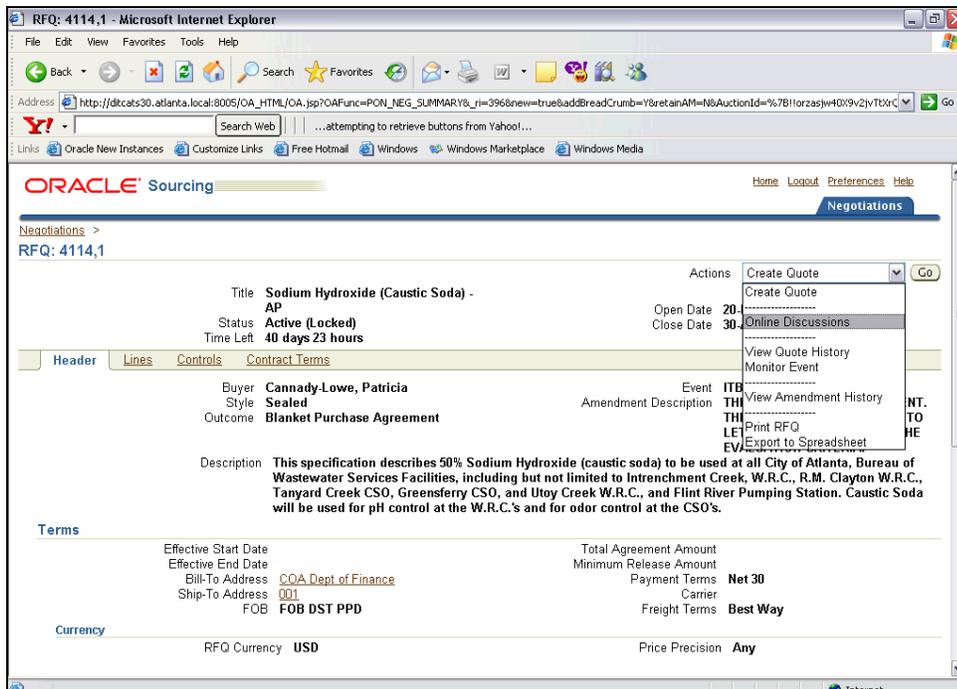
Step	Action
4.	Click the <b>Sourcing Home Page</b> link. <a href="#">Sourcing Home Page</a>



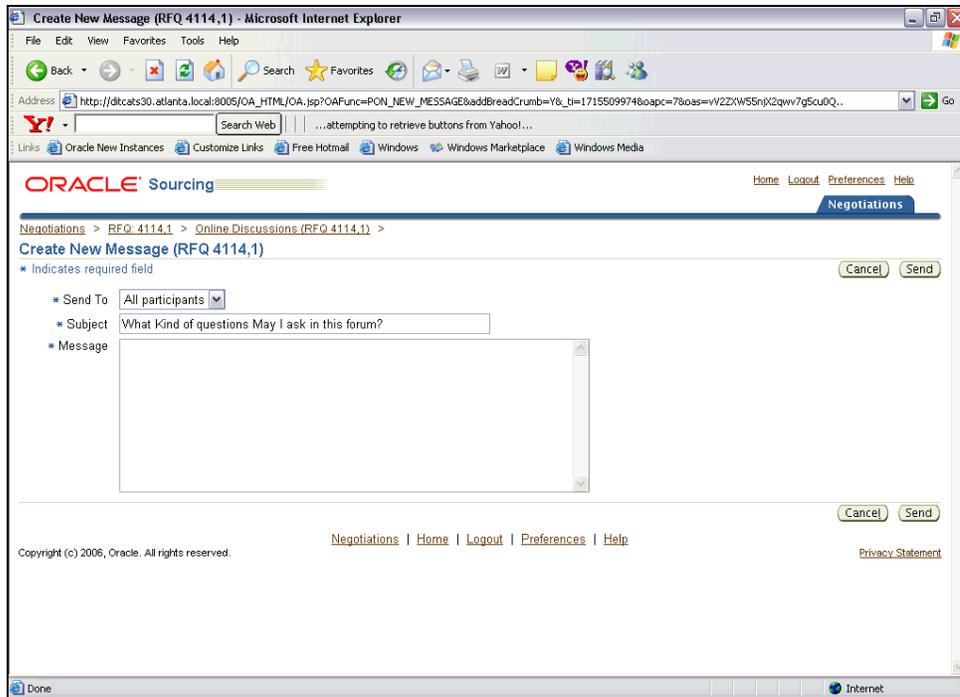
Step	Action
5.	Point to the <b>4114,1</b> object. Let us open the RFQ. <a href="#">4114,1</a>
6.	Click the <b>4114,1</b> link. <a href="#">4114,1</a>



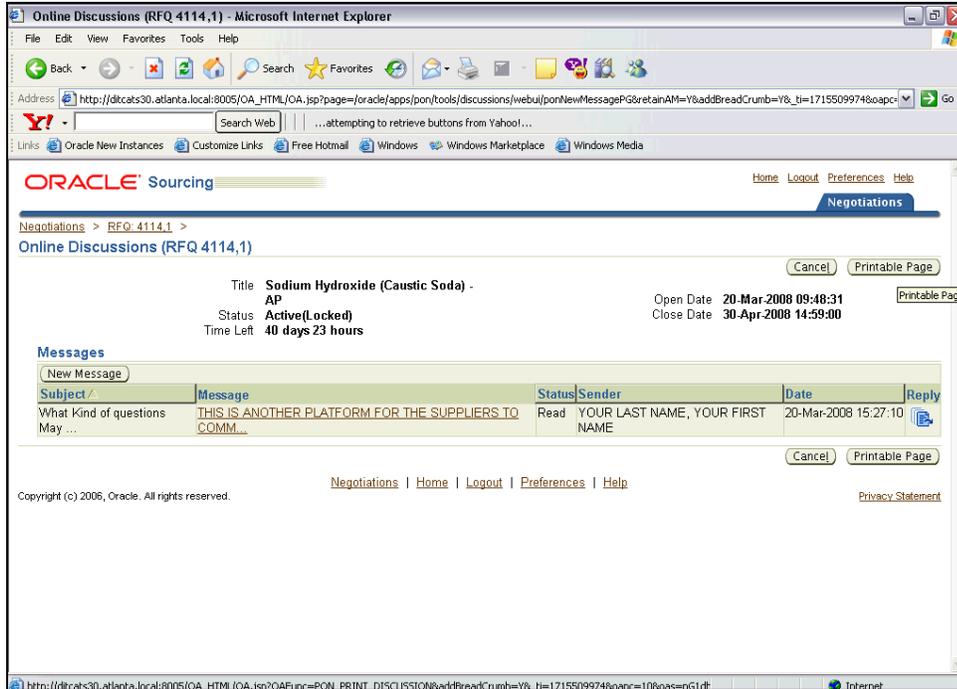
Step	Action
7.	Click the <b>Actions</b> list. <div style="border: 1px solid black; padding: 2px; display: inline-block;">                     Create Quote                 </div>



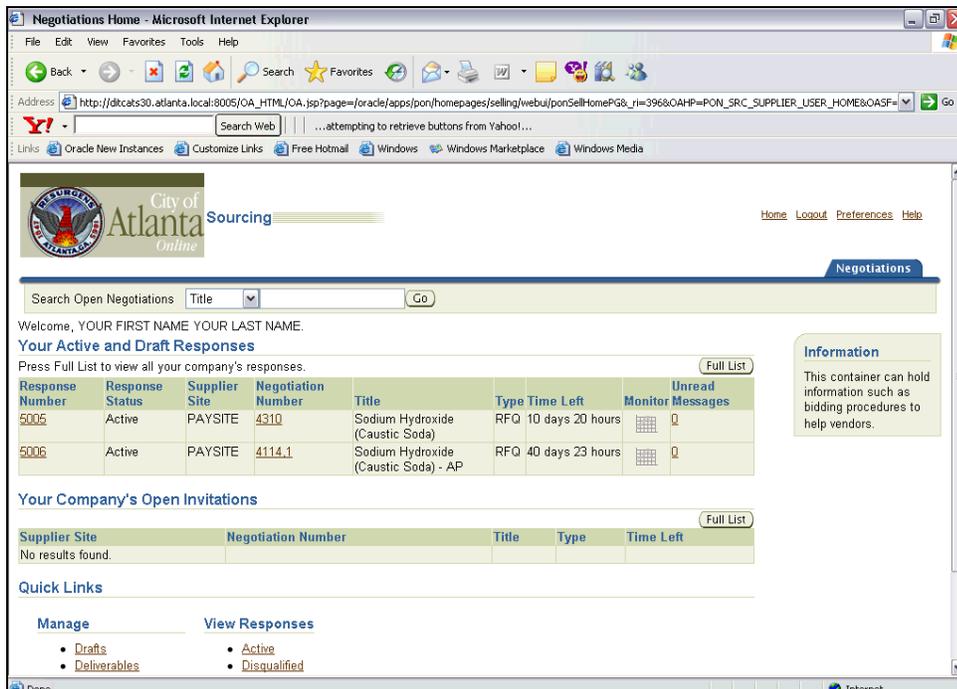
Step	Action
8.	Click the <b>Online Discussions</b> list item. 
9.	Click the <b>Go</b> button. 
10.	Point to the <b>New Message</b> object. 
11.	Enter the desired information into the <b>Subject</b> field. Enter " <b>What Kind of questions May I ask in this forum?</b> ".



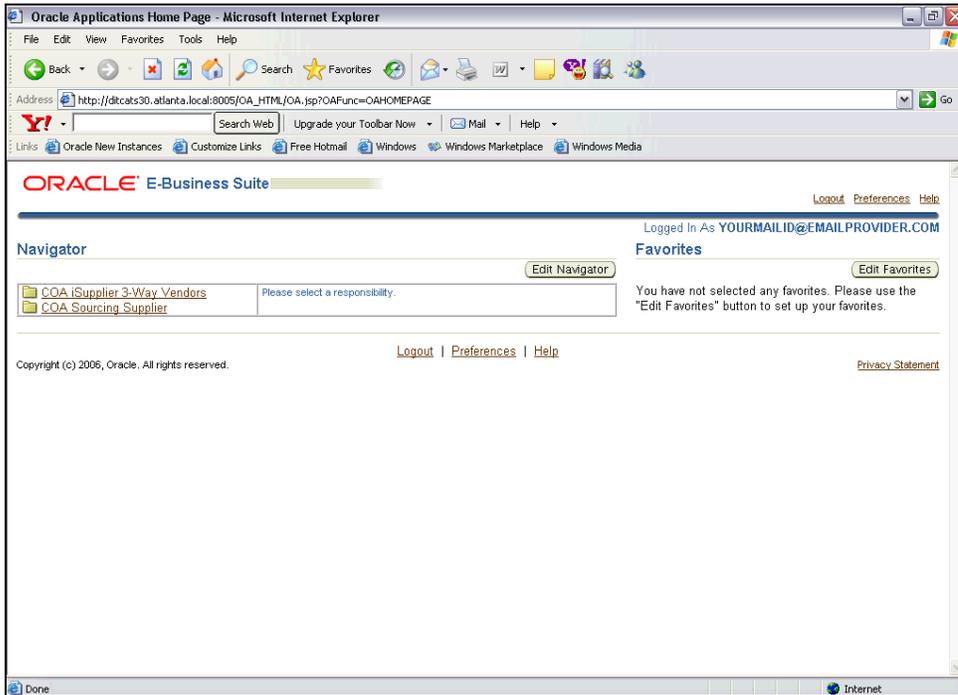
Step	Action
12.	Press <b>[Insert]</b> .  Enter your question in the message body and click the send button.



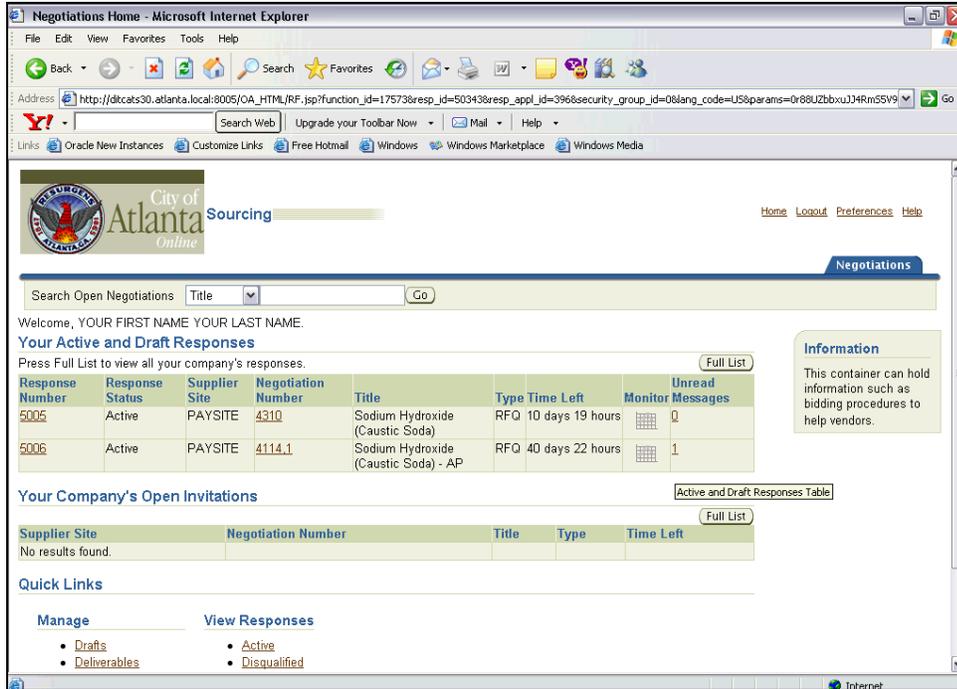
Step	Action
13.	Click the <b>PON_SOURCING_TAB_S</b> tab. 



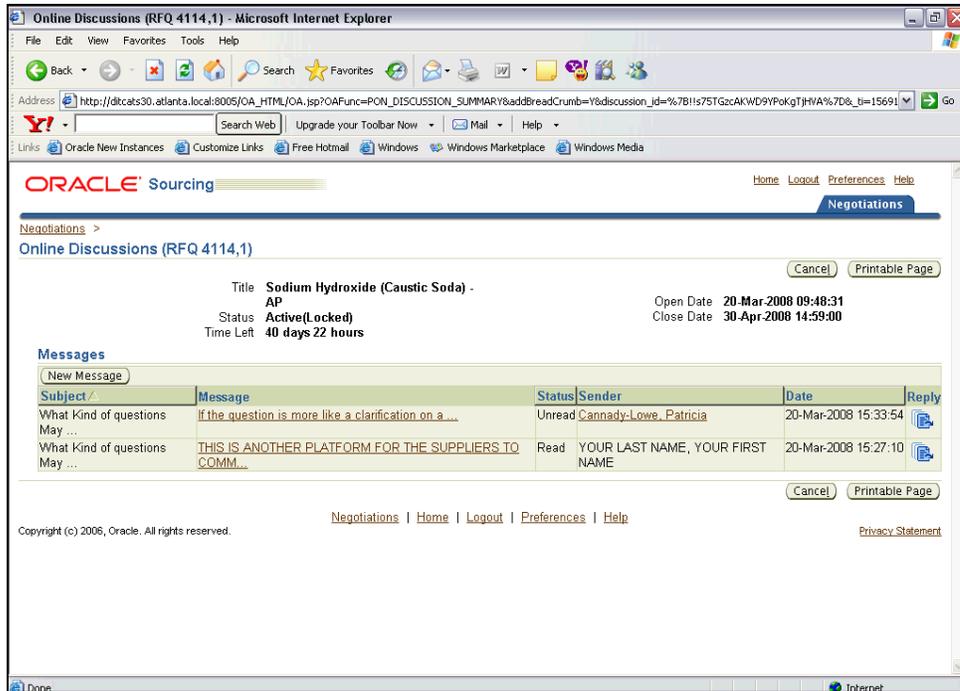
Step	Action
14.	Press <b>[Enter]</b> .



Step	Action
15.	Click the <b>COA Sourcing Supplier</b> link. Let us now learn to view the response from the City. <u>COA Sourcing Supplier</u>
16.	Click the <b>Sourcing Home Page</b> link. <u>Sourcing Home Page</u>



Step	Action
17.	<p>Click the <b>1</b> link.</p> <p>Note that in your home page, you have 1 unread message.</p> <p>Click that to open the message and read.</p> <p><b>1</b></p>



Step	Action
18.	Point to the <b>If the question is more like a clarification on a ...</b> object. <u>If the question is more like a clarification on a ...</u>
19.	Click the <b>If the question is more like a clarification on a ...</b> link. <u>If the question is more like a clarification on a ...</u>
20.	Congratulations.  You have just learnt to use the Instant Messaging to communicate with the City buyers. <b>End of Procedure.</b>