Tampa International Airport®

This manual provides information necessary to become a registered Supplier with the Hillsborough County Aviation Authority Procurement Department.

Supplier Portal

Instruction Manual

Introduction to Supplier Portal

Hillsborough County Aviation Authority (Authority) has transitioned to an internet based Procure-to-Pay environment via Oracle®, an Enterprise Resource Planning (ERP) software package.

All Suppliers doing business with the Authority must register via the Supplier Portal (Portal). The Portal allows the Supplier to gain instant visibility to standard purchase orders, blanket purchase agreements, contract purchase agreements, blanket releases, receipts, invoices, payments and other administrative information. This allows for an increased level of communication between suppliers and the Authority, thereby ensuring success for everyone.

While navigation and access to data is intended to be easy within the Portal, questions on how to access certain data and screens may arise. This training manual was created to provide our Suppliers with general instructions about how the Portal works and how to navigate the various pages. By reading and following the step-by-step instructions, the Supplier will be better prepared to accomplish commonly used tasks.

The following Authority personnel are available for assistance, should it be necessary.

General Inquiries

- Procurement Helpline (813) 870-8796

Supplier Portal Administration, Navigation, Registration

- Kathleen Fisher (813) 870-8732
- Chris Rewis (813) 870-8768

Products and Services, Sourcing

- Chris Rewis (813) 870-8768
- Tim Shoby (813) 870-8730

Table of Contents

Introduction to Supplier Portal 1
Definition of Terms 4
Frequently Asked Questions 7
New Suppliers 9
General 12
Organization 13
Address Book 14
Contact Directory 15
Business Classifications 16
Products and Services 17
Payment and Invoicing 18
Existing Suppliers 19
General 22
Organization 23
Address Book 24
Contact Directory 25
Business Classifications 26
Products and Services 27
Payment and Invoicing 28
iSupplier Portal Full Access 29
Orders Tab 31
Purchase Orders 31
Agreements 31
Purchase History 31
Work Confirmations 31
Deliverables 32
Purchase Orders 33
Agreements 39
Purchase History 42
Work Confirmations 44
Manage Deliverables 47
Shipments Tab 49
View Receipts 49

View Returns 50
View Overdue Receipts 50
View On-Time Performance 52
Finance Tab 53
Create Invoice With a PO 53
View Invoices 57
View Payments 58
Sourcing Supplier 60
Active and Draft Responses 61
Response Number 61
Negotiation Number 62
Unread Messages 62
Your Company's Open Invitations 63
Header Page 64
Lines Page 65
Supplier Profile & User Manager 69
General 70
Organization 71
Address Book 72
Contact Directory 73
Business Classifications 75
Products and Services 76
Payment and Invoicing 77
Conclusion 78

Definition of Terms

1. Addresses: address(es) associated with the Supplier. Examples of these are Company headquarters, Company remit-to address, Local office, etc.

2. Administrator: employee of a Supplier that has been assigned the responsibility to manage and maintain the Supplier's Profile. The Supplier's Profile includes information about the Supplier such as: General Organization, Contact Directory, Addresses, Business Classifications, Products and Services, and Payment and Invoicing.

3. Agreement: a purchase order created from an executed contract between the Supplier and the Authority. This is either issued as a Global Blanket Purchase Agreement or a Contract Purchase Agreement.

4. Business Classifications: categories that define minority status, licensure, bonding capabilities, etc.

5. Buyer: Authority employee issuing the purchase order or Negotiation.

6. Contact Directory: lists all employees that have been set up in the Supplier's Profile. Employee(s) may or may not have assigned responsibilities that allows them to access Supplier information housed in the assigned responsibilities.

7. Contract Purchase Agreement (CPA): a purchase order created from an executed contract between the Supplier and the Authority whereby various items are purchased at different prices on an as-needed basis. Purchases are tracked by total amount of funds expended.

8. Deliverable: actions or information required of the Supplier that are made a part of the purchase order, GBPA or CPA. Examples are: insurance certificate, Material Safety Data Sheet (MSDS), specifications or other documentation necessary for the completion of the purchase order.

9. Enterprise Resource Program (ERP): financial system with multiple modules that combines various functionalities for the Authority's Departments into one software platform.

10. Global Blanket Purchase Agreement (GBPA): a purchase order created from an executed contract between the Supplier and the Authority whereby repetitive purchases are made at the same cost each time.

11. Header: section of the Request for Quote (RFQ; Negotiation) that contains general and required information about the quote. This page is located in the Sourcing responsibility.

12. iSupplier Portal Full Access: section of the Supplier Portal that allows the Supplier to manage purchase orders, receipts, deliverables, invoices, payments and other financial transactions.

13. Line(s): section of the RFQ that allows the Supplier to provide pricing for each line within the RFQ. This page is located in the Sourcing responsibility.

14. List of Values: actions that can be taken via drop-down lists provided throughout the Portal.

15. Negotiation (RFQ): electronic request for quote. Procurement method that requests pricing for the good(s) and/or service(s) being sourced.

16. Notifications: electronic messages from the System that notifies the user an action has been taken by the Authority or an action needs to be performed by the user within the Supplier Portal.

17. Organization: section of the Supplier Profile and User Manager responsibility that houses general company information such as headquarters and local offices, number of employees company-wide, and taxpayer identification.

18. Payment and Invoicing: section of the Supplier Profile and User Manager responsibility that provides the Administrator the ability to choose a payment method by address site. It also allows for a choice of notification of method of payment, i.e., email, fax, etc.

19. Products and Services: codes that represent a particular good or service. Each code represents a three digit "parent", which defines the category the particular good or service is located within and a two digit "child", which identifies the particular good or service. This code is based on the NIGP code. For additional information, visit NIGP Code at http://www.nigp.com/whythecode.php.

20. Receipt: document that confirms good(s) or services(s) were received by the Authority.

21. Request for Quote (RFQ, Negotiation): Procurement method that requests pricing for the good(s) and/or service(s) being sourced.

22. Response Number: number that identifies a Supplier's unique response to an RFQ.

23. Responsibility: access to Oracle which allows the Supplier to perform the functions found in that particular section of Oracle.

24. Sourcing Supplier: section of the Portal that provides electronic sourcing.

25. Supplier Portal: section of the Authority's ERP System that provides access to the Supplier's Profile. The Profile houses standard purchase orders, blanket purchase agreements, contract purchase agreements, blanket releases, receipts, invoices, payments and other administrative information and allows the Supplier real-time interaction with the Authority.

26. Supplier Profile: Company information housed within iSupplier Portal Full Access responsibility. The Profile contains general Company information, Addresses, Contact Directory, Business Classifications, Products and Services, and Payment and Invoicing.

27. Supplier Profile & User Manager: section of the Portal that only Administrators have access to; this allows the Administrator to manage the Supplier Profile as necessary.

28. User: a contact of the Company that has assigned responsibility(ies) within the Supplier Portal.

29. Vacation Rules: located on the Oracle Applications Home Page, this action allows a user to temporarily transfer their Portal rights to another user within the Company.

30. Work Confirmation: Supplier generated record that provides current work information for construction projects. Supplier progress invoices are created from Work Confirmations.

31. Worklist Access: located on the Oracle Applications Home Page, this action allows a user to temporarily grant access to their notifications to another user within the Company.

Frequently Asked Questions

1. I don't remember my password; can you reset it?

   Yes. Ask your Company Administrator to check the box in your Contact Directory file that says "Reset Password". Once it has been reset by the System, you will receive a System generated email with your new temporary password. You will be required to change it when you log into the System for the first time after reset.

2. Our Administrator is out of town and we need to make changes to our Company Profile; can you help me?

   Yes. The Authority is suggesting that each Company identify two Administrators; one that handles the day to day operations and one that is a backup. If neither is available, call or email Procurement Helpline. 813-870-8796 or procurementhelpline@tampaairport.com

3. Why can't I log into the System?

   Contact your Company's IT Department. This may be due to firewall issues, internet browser issues, or your system may be delivering email notifications from the Portal into your "spam" folder.

4. How do I create an invoice?

   Creating invoices are fully explained beginning on page 46 of this manual.

5. What do we do if one of our employees with access to the Portal leaves our Company?

   The Administrator can go into that employee's Contact Directory file and inactivate the employee.

6. What is my user name?

   Your User name is the email address you provided to the Authority at the time you requested access to the Portal.

7. What if my email address changes?

   If your email address changes, ask your Administrator to deactivate your current file and set up a new one with the new email address.

8. How do I find out if an invoice has been paid?

   Navigate to the Finance Tab then click on the View Invoices hyperlink. Additional information is provided in the Finance Tab section of this manual.

9. How long does it take to get a request approved?

   Depending on the request, please allow 24 – 48 hours for approval. If you need further assistance, please call Procurement Helpline at 813-870-8796.

10. How will I know when my Supplier Profile is set up?

    The System will send you a notification that provides a hyperlink and your temporary password. Log into the System via the hyperlink, change your password to something that you can easily remember then follow the directions provided in this manual to complete the setup of your Profile.

New Suppliers

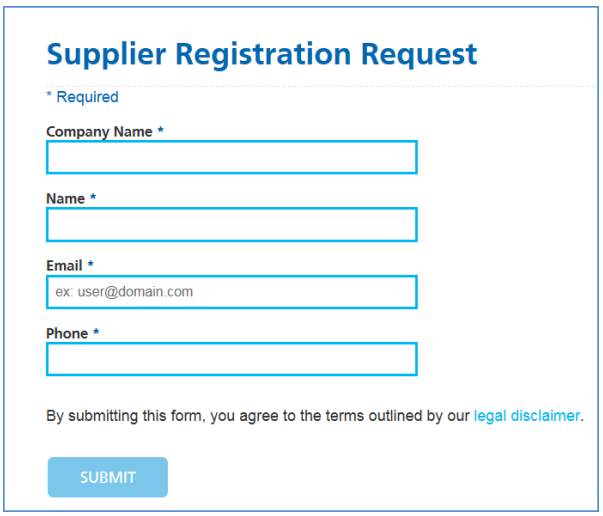
Welcome to Hillsborough County Aviation Authority, also known as Tampa International Airport, Procurement Department! Our mission is "to create value for the Authority and the Tampa Bay region with timely procurement and efficient management of goods and services, in a professional and transparent manner." We can only do this with the assistance of our Supplier community.

As you navigate through these instructions to become a registered Supplier for the Authority, please let us know how we can better assist you. General TIPs are provided throughout the process to help guide you through the various steps.

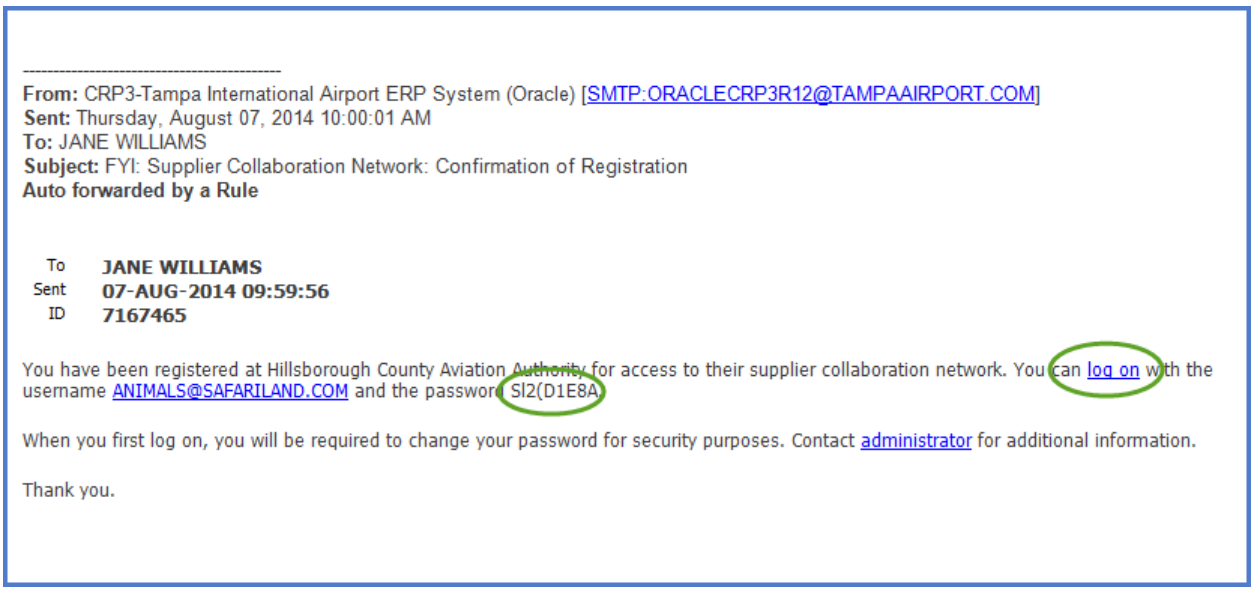
To begin the process, visit www.tampaairport.com, click on "Learn about TPA" then "Business Opportunities" to access the Airport Business page. Click on "Register as a Supplier" located in the "More Information" list to be directed to the Supplier Portal Registration Process webpage.

To begin the registration process, click on the “Supplier Registration Request.”

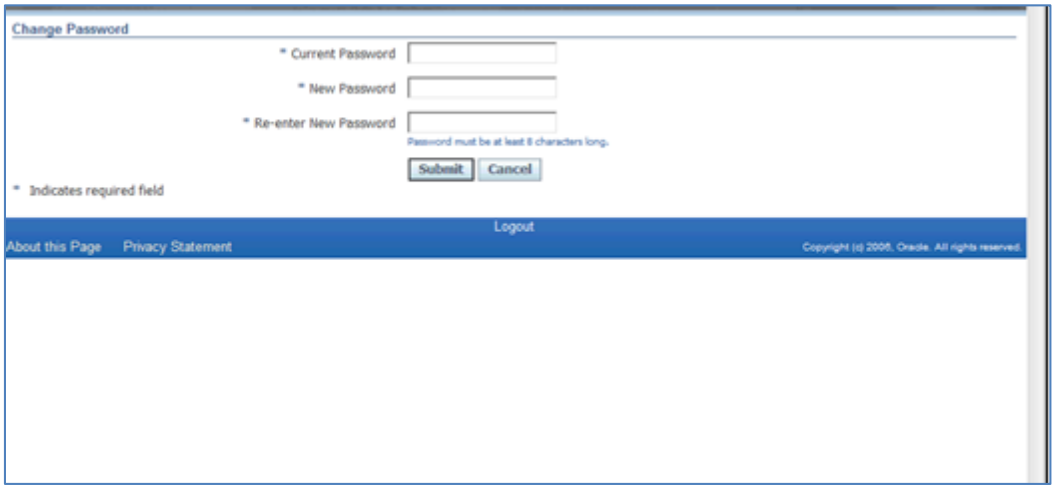
This is the form that must be filled out to request access to Oracle:



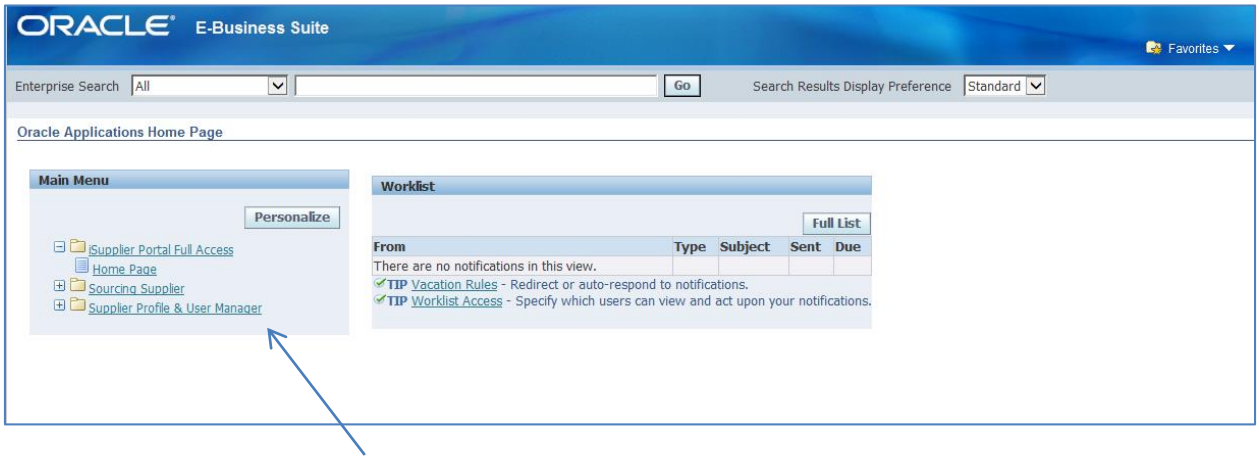
This will allow the Authority to create the Supplier Profile. The System will confirm your request at this point and send a System generated email with your user name and temporary password:



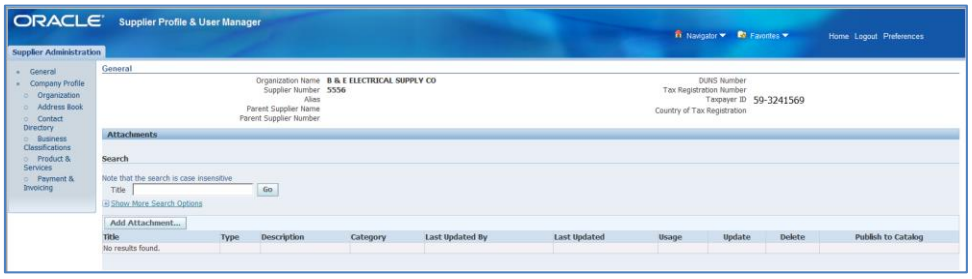
You can now log into the Portal via the **log on** link within the email. Make sure that you type in the temporary password EXACTLY as it appears in the email. The best way to do this is to copy the password from the email then paste it into the Current Password field. Enter a new password that will be easy to remember but difficult for others to guess then click Submit.



The System takes you to the Oracle Applications Home Page. You are now able to complete your Company Profile.



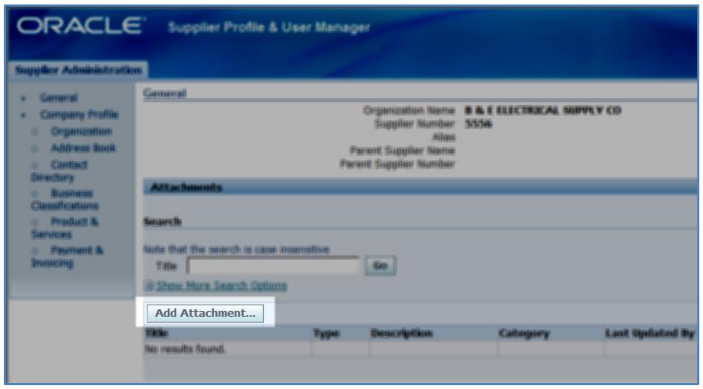
Click on Supplier Profile & User Manager to access your Supplier Profile. This takes you to the Supplier Administration page which is where Company information is stored.



General

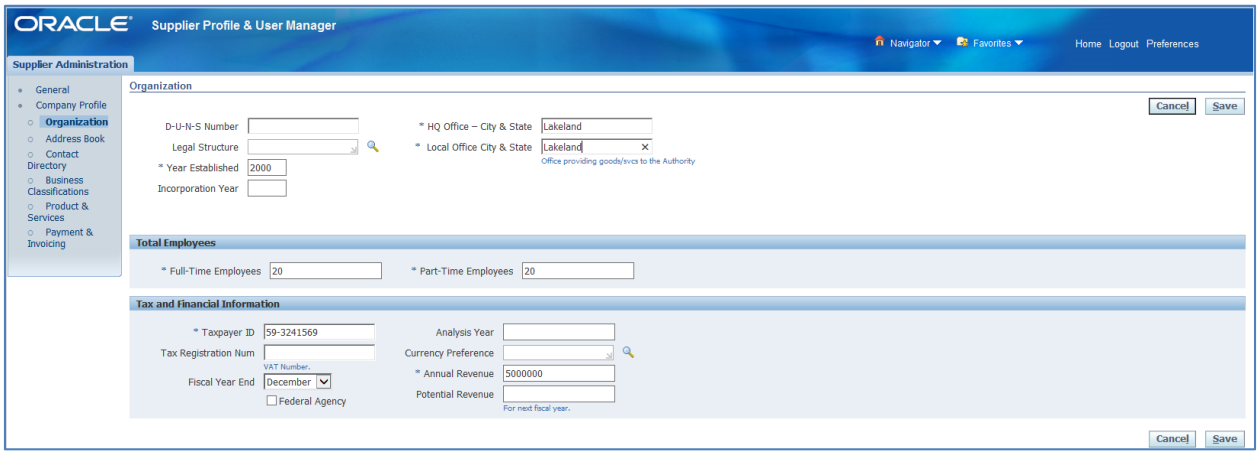
The General section provides basic Company information. This is the best place to add attachments that pertain to your Company such as minority certificates or licenses.

To add an attachment, click on the Add Attachment button.



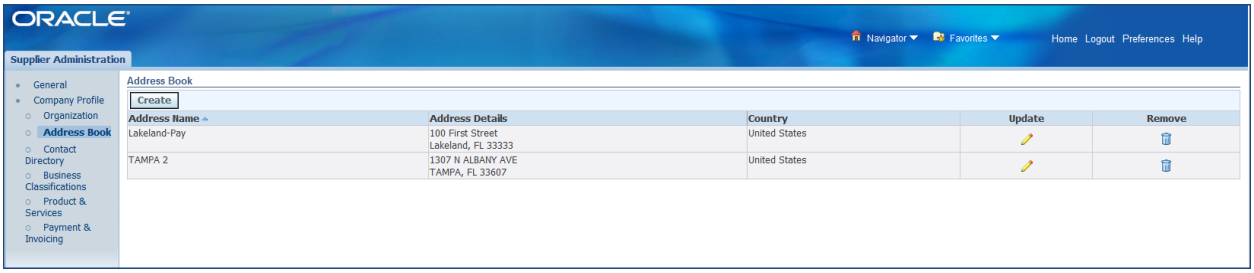
Organization

The Organization page provides additional general information about your Company. The fields marked with an asterisk (*) are required fields.

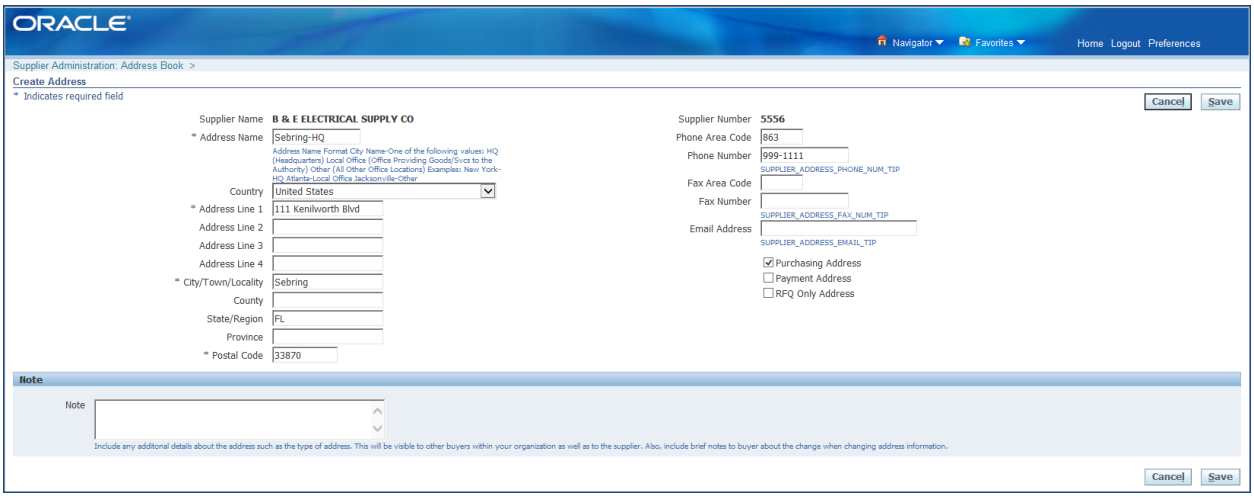


Address Book

The Address Book lists the various addresses for your Company.

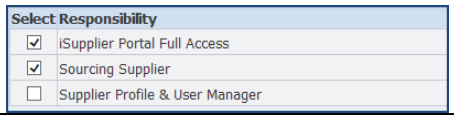


Step	Action
1.	To set up a new address, click the **Create** button.
2.	The Address Name should be the City of the address. To make a specific identification of the address, add a hyphen and the descriptive word (i.e. –Payment) to the end of the address name. All fields with an asterisk (*) are required. Click **Apply.**
3.	Select the option(s) that apply to this address: **Purchasing Address and/or Payment Address.** Do not select **RFQ Only Address.** This option will only allow the user to receive RFQs. It will not allow the System to create purchase orders if the Company is awarded an RFQ.
4.	When all information is entered, click **Save.**



Contact Directory

This section provides a list of your employee(s) that have access to the Supplier Portal. The employee may just be listed as a contact, with no responsibilities, or may be a contact that has any or all of the three responsibilities (iSupplier Full Access, Sourcing, Supplier User & Profile Manager). To view the responsibilities granted to an individual user simply click on the pencil icon below Update.

Step	Action
1.	To set up a new contact, click the **Create** button.
2.	Fill in the relevant information. Check the box next to the **Create User Account for this Contact.** The checkbox next to **Certification Reminders** should be checked. All fields with an asterisk (*) are required.
3.	Check the box next to each **Responsibility** the user is being provided access to. REMEMBER: do not click the box next to **Supplier Profile & User Manager** if the user is not an Administrator. We recommend only **2** users be provided this responsibility. 
4.	If there are Supplier or contact restrictions, you are able to note these by clicking on the appropriate **Modify** button. You will need to modify a site first, log out of the System then log back in to be able to modify the contact(s) associated with that site.
5.	Once you have provided all necessary information, click **Apply.**

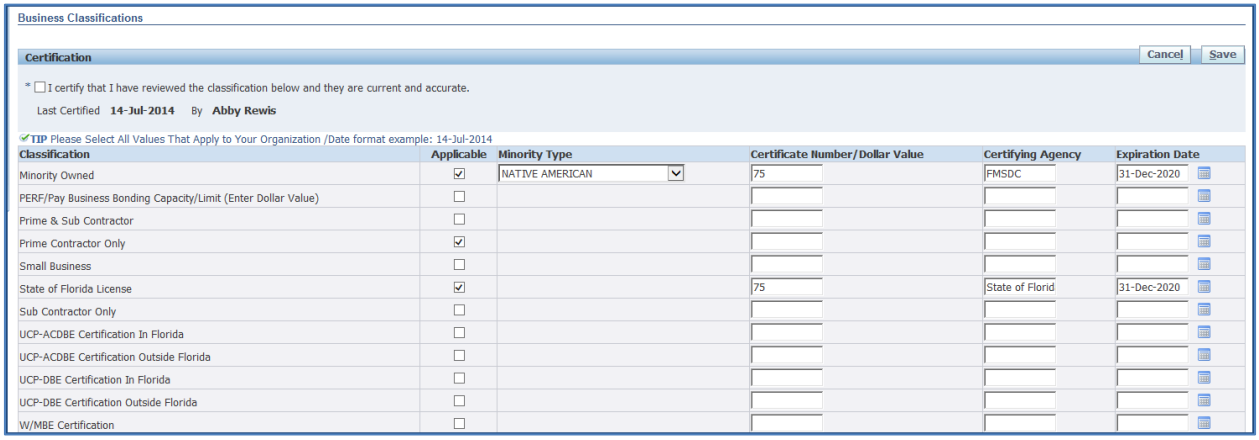
The new contact will receive a System generated email with their user name and temporary password. The first time they log into the System, they will be required to change their password.

If you inactivate any of your contacts, they will be listed under Contact Directory: Inactive Contacts.

Business Classifications

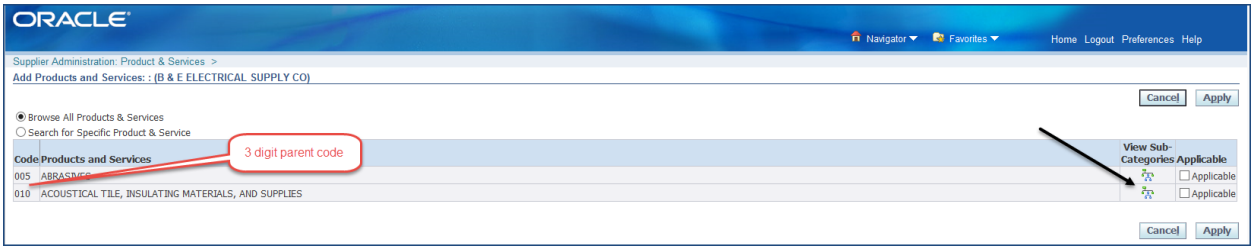
The Business Classifications section provides the Authority with important information concerning licensure, bonding capabilities, minority status and whether you are a prime Supplier, a sub or both. This information aids us in meeting our diversity requirements as well as being able to continue to assist the minority community in business opportunities with the Authority.

Generally, this information will be completed during the initial set up of your Profile. Updates to all relevant certifications are to be made here annually. Copies of the certificates can be scanned and uploaded to the General page.

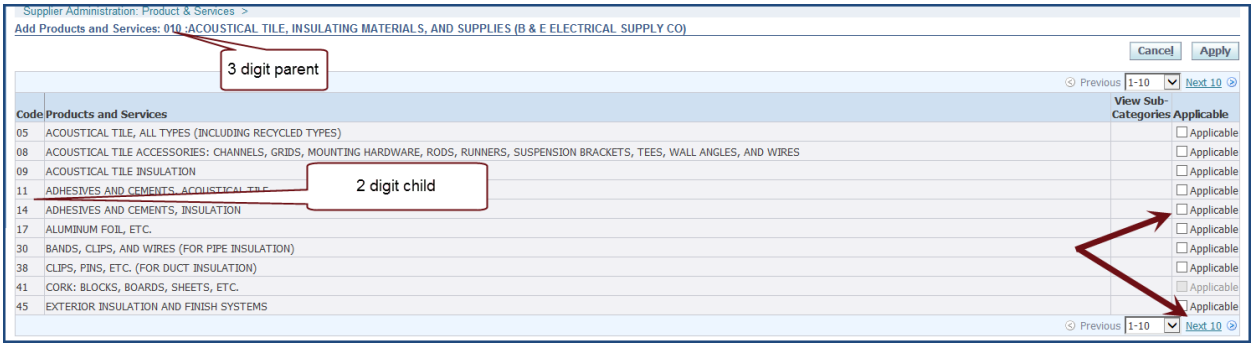


Products and Services

The Products and Services section provides you specific codes that indicate the good(s) and/or service(s) that you will be providing to the Authority. The code numbers have a three digit "parent" code which identifies the group. The two digit "child" code, which is found after the hyphen, actually identifies a particular good or service. The Authority asks that you do NOT select a three digit parent code; always click on the icon under "View Sub-Categories" to pull up the list of two digit child codes.

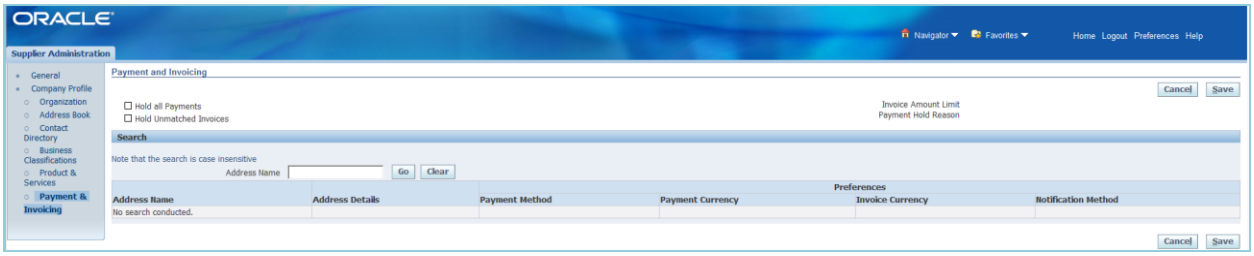


Step	Action
1.	To search the list of codes by browsing, click the radio button next to **Browse All Products & Services**. Click on the icon.
2.	Select the appropriate "child" code(s) by checking the box next to **Applicable.** If you need to continue searching this "parent" code, click **Next 10**. Once all codes are selected, click **Apply.**

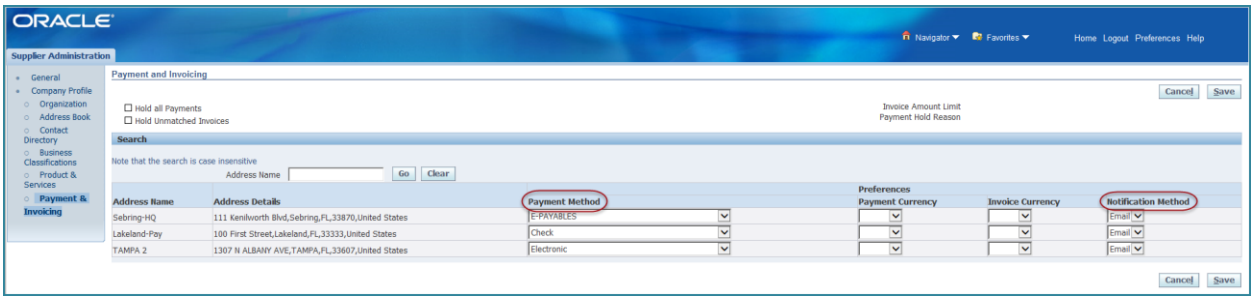


Payment and Invoicing

The Payment and Invoicing section will allow you to select payment method(s) by address (site). It also allows you to set up the method of notification when a payment has been made.



Step	Action
1.	To get a list of your Company addresses, click **Go** in the **Search** section.
2.	For each address, click on the **Payment Method** list of values then click on the **Notification Method** to choose how you would like to be contacted when payment is made. Once all selections are made, click **Save.**



You have now completed set up of your Supplier Profile in the Portal.

All changes to the Supplier Profile require Authority approval; please allow 24 – 48 hours for the approval process to be completed. The System will not allow any additional changes to any record(s) with pending changes within your Profile until the preceding change has been approved or rejected by Authority staff.

Existing Suppliers

Existing Suppliers are required to register in the Portal with a valid email address for their Company. This email represents your Company's user identification so it is very important that this address be an actively monitored email address as it is the means by which communication will transpire between your Company and the Authority. Courtesy notification of active solicitations will be delivered via these means and you will be required to respond electronically. We recommend that this email address be the primary Administrator's email address.

To begin the process, visit www.tampaairport.com, click on "Learn about TPA" then "Business Opportunities" to access the Airport Business page. Click on "Register as a Supplier" located in the "More Information" list to be directed to the Supplier Portal Registration Process webpage.

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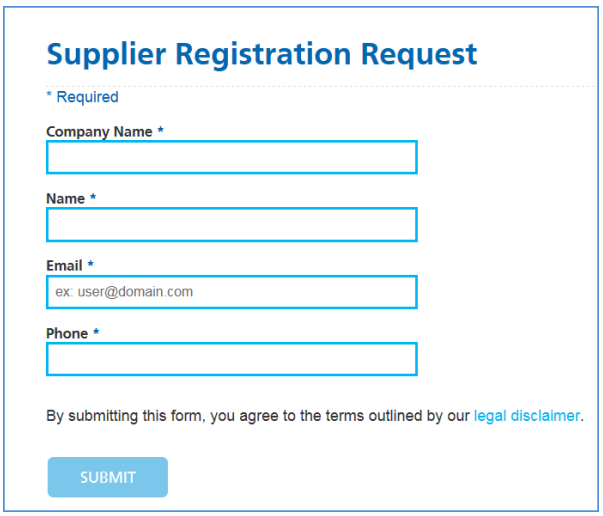

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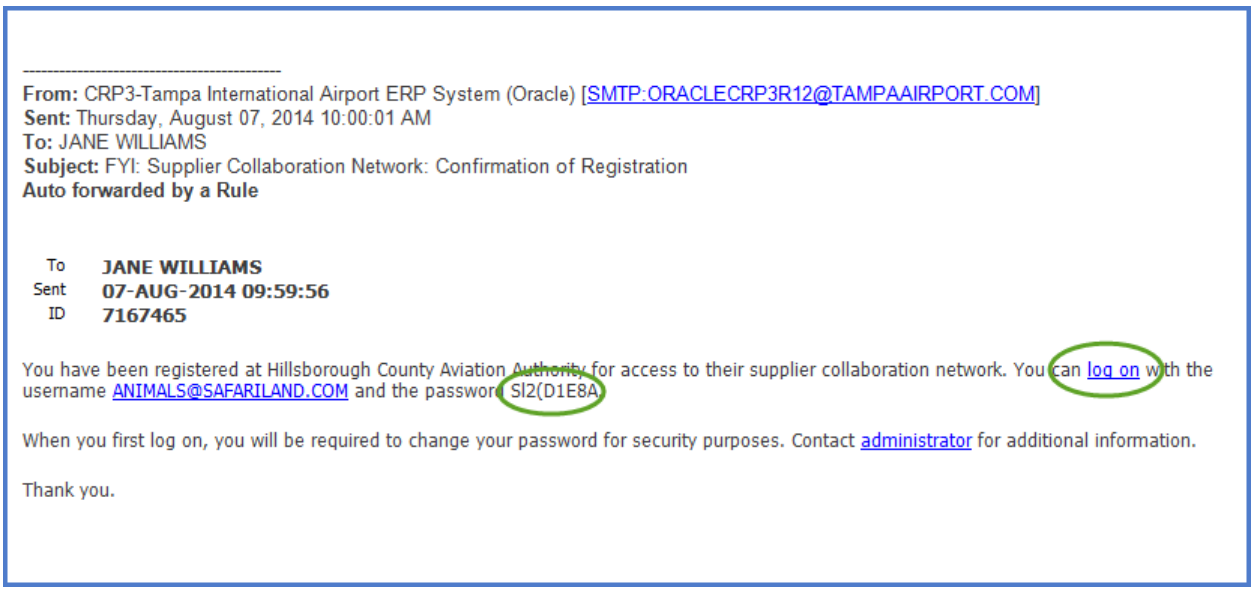

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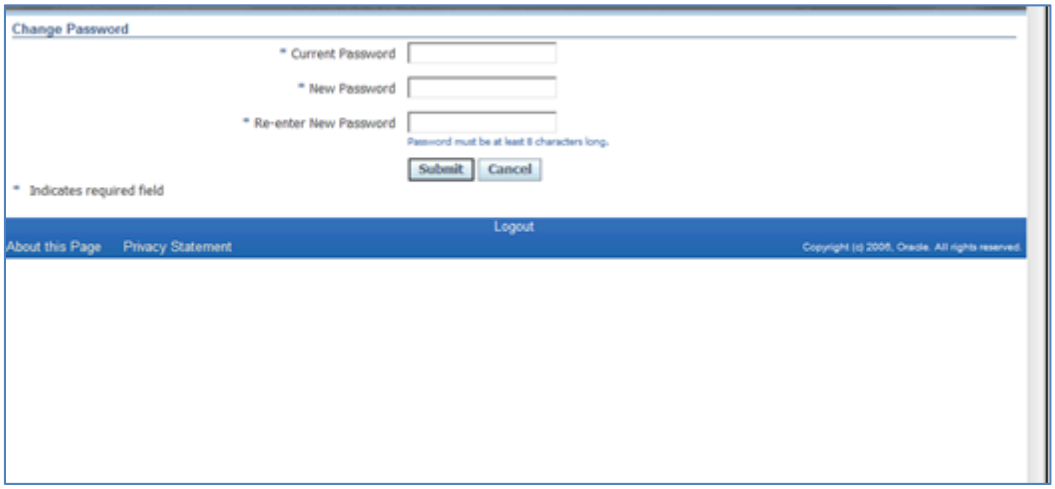

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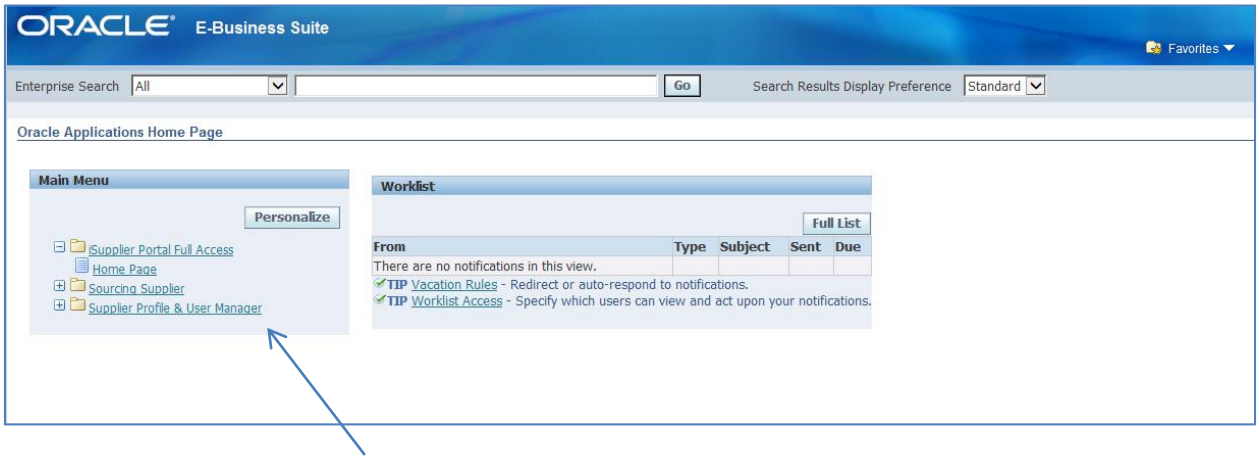

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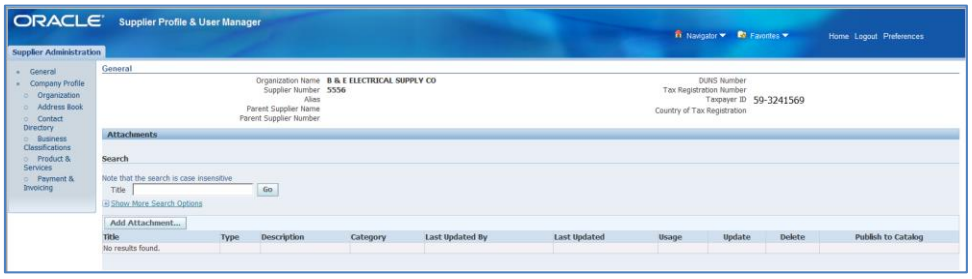

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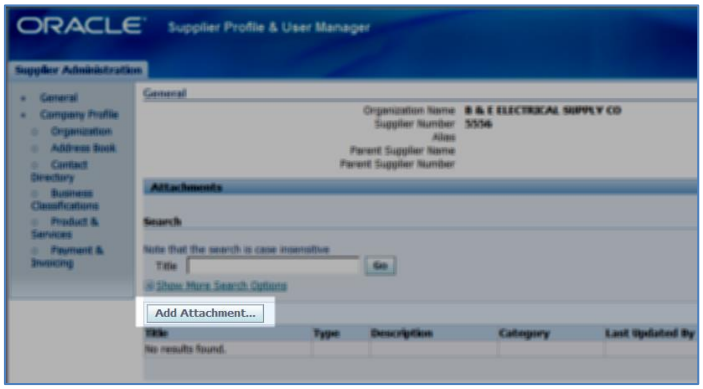

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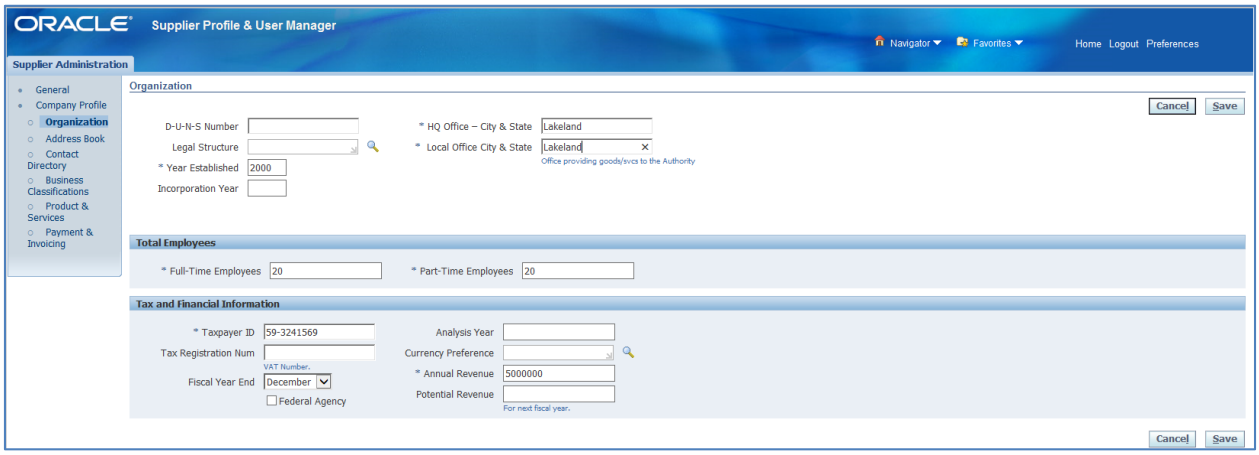

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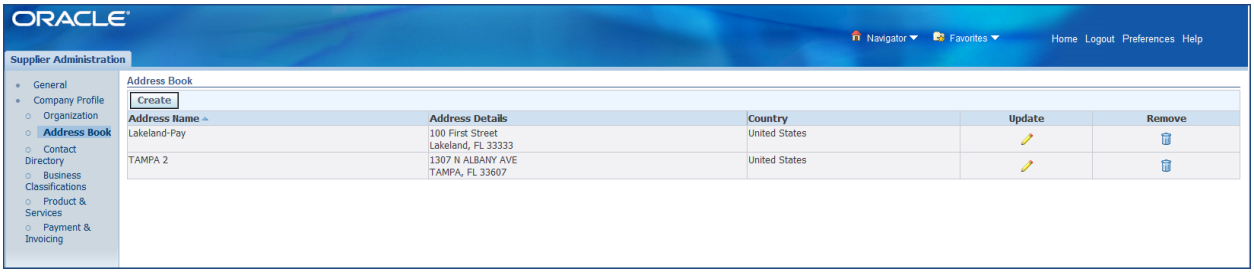
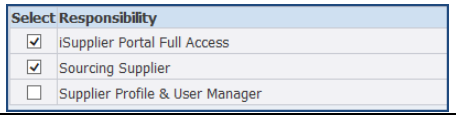


Step	Action
1.	To set up a new address, click the **Create** button.
2.	The Address Name should be the City of the address. To make a specific identification of the address, add a hyphen and the descriptive word (i.e. –Payment) to the end of the address name. All fields with an asterisk (*) are required. Click **Apply.**
3.	Select the option(s) that apply to this address: **Purchasing Address and/or Payment Address.** Do not select **RFQ Only Address.** This option will only allow the user to receive RFQs. It will not allow the System to create purchase orders if the Company is awarded an RFQ.
4.	When all information is entered, click **Save.**

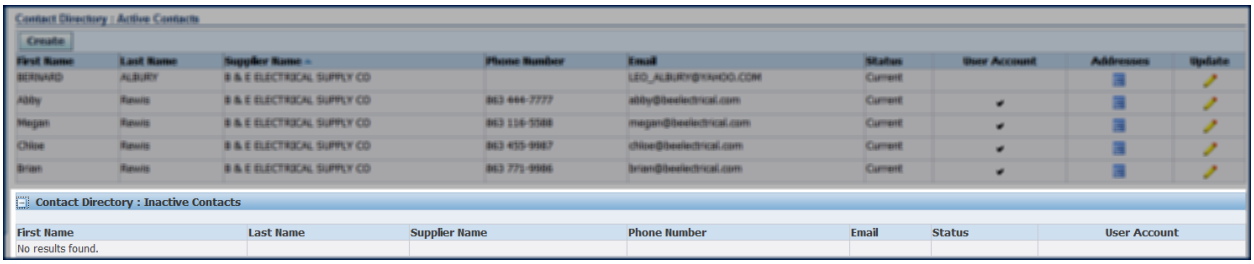
Contact Directory

This section provides a list of your employee(s) that have access to the Supplier Portal. The employee may just be listed as a contact, with no responsibilities, or may be a contact that has any or all of the three responsibilities (iSupplier Full Access, Sourcing, Supplier User & Profile Manager). To view the responsibilities granted to an individual user simply click on the pencil icon below Update.

Step	Action
1.	To set up a new contact, click the **Create** button.
2.	Fill in the relevant information. Check the box next to the **Create User Account for this Contact.** The checkbox next to **Certification Reminders** should be checked. All fields with an asterisk (*) are required.
3.	Check the box next to each **Responsibility** the user is being provided access to. REMEMBER: do not click the box next to **Supplier Profile & User Manager** if the user is not an Administrator. We recommend only **2** users be provided this responsibility. 
4.	If there are Supplier or contact restrictions, you are able to note these by clicking on the appropriate **Modify** button. You will need to modify a site first, log out of the System then log back in to be able to modify the contact(s) associated with that site.
5.	Once you have provided all necessary information, click **Apply.**

The new contact will receive a System generated email with their user name and temporary password. The first time they log into the System, they will be required to change their password.

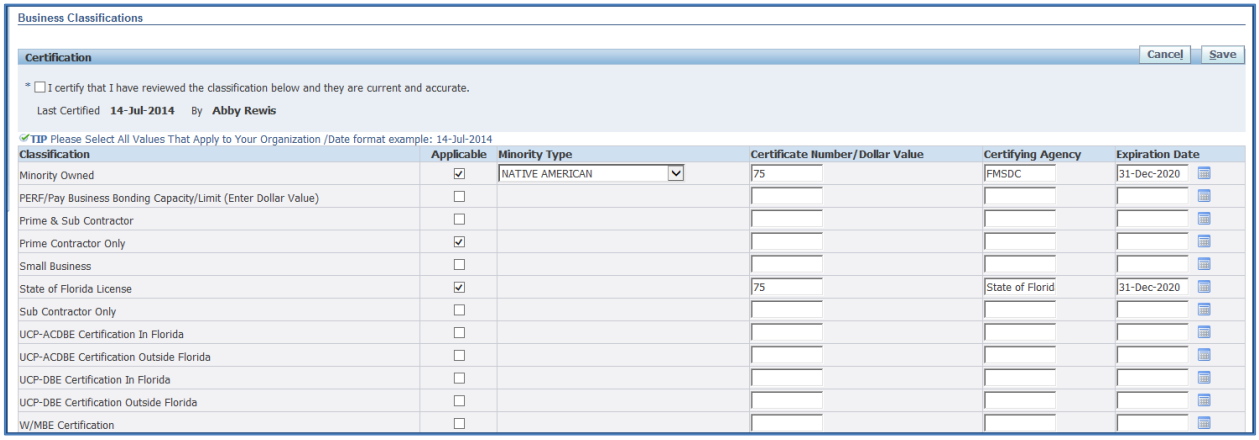
If you inactivate any of your contacts, they will be listed under Contact Directory: Inactive Contacts.



Business Classifications

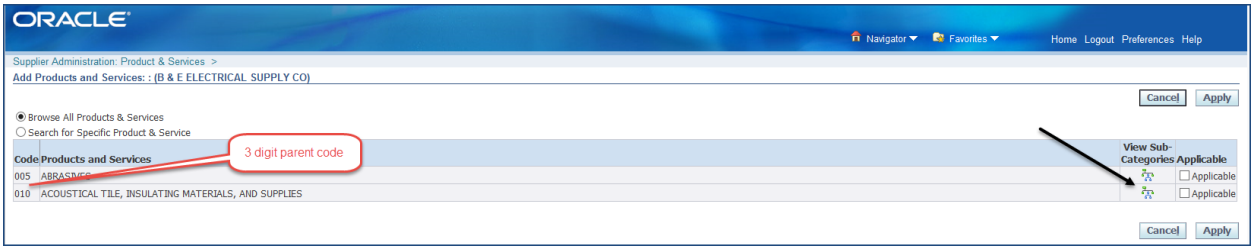
The Business Classifications section provides the Authority with important information concerning licensure, bonding capabilities, minority status and whether you are a prime Supplier, a sub or both. This information aids us in meeting our diversity requirements as well as being able to continue to assist the minority community in business opportunities with the Authority.

Generally, this information will be completed during the initial set up of your Profile. Updates to all relevant certifications are to be made here annually. Copies of the certificates can be scanned and uploaded to the General page.

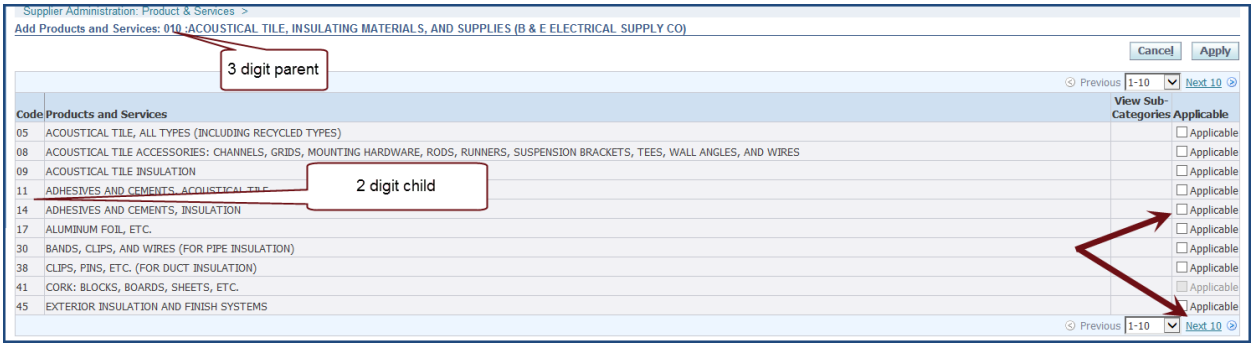


Products and Services

The Products and Services section provides you specific codes that indicate the good(s) and/or service(s) that you will be providing to the Authority. The code numbers have a three digit "parent" code which identifies the group. The two digit "child" code, which is found after the hyphen, actually identifies a particular good or service. The Authority asks that you do NOT select a three digit parent code; always click on the icon under "View Sub-Categories" to pull up the list of two digit child codes.

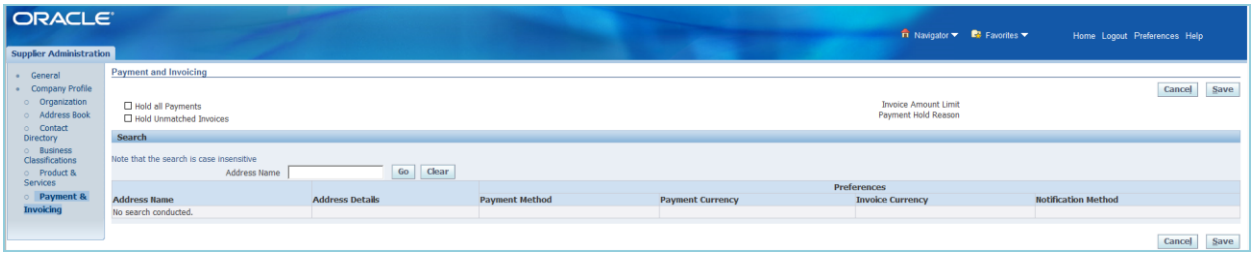


Step	Action
1.	To search the list of codes by browsing, click the radio button next to **Browse All Products & Services**. Click on the icon.
2.	Select the appropriate "child" code(s) by checking the box next to **Applicable.** If you need to continue searching this "parent" code, click **Next 10**. Once all codes are selected, click **Apply.**

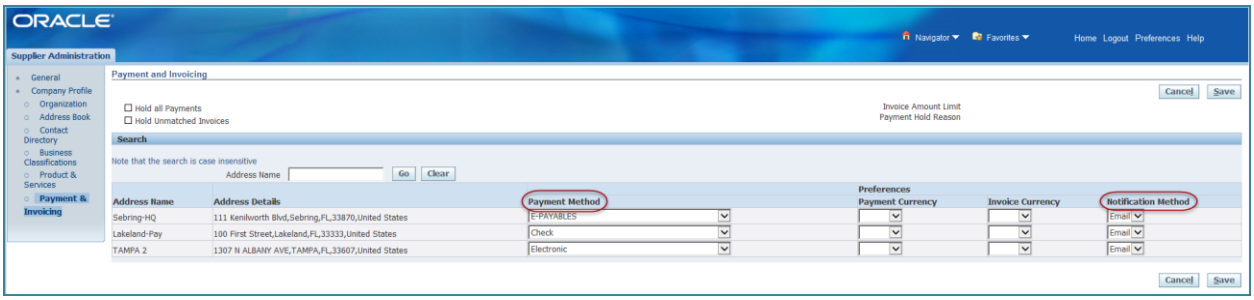


Payment and Invoicing

The Payment and Invoicing section will allow you to select payment method(s) by address (site). It also allows you to set up the method of notification when a payment has been made.



Step	Action
1.	To get a list of your Company addresses, click **Go**.
2.	For each address, click on the **Payment Method** list of values then click on the **Notification Method** to choose how you would like to be contacted when payment is made. Once all selections are made, click **Save.**



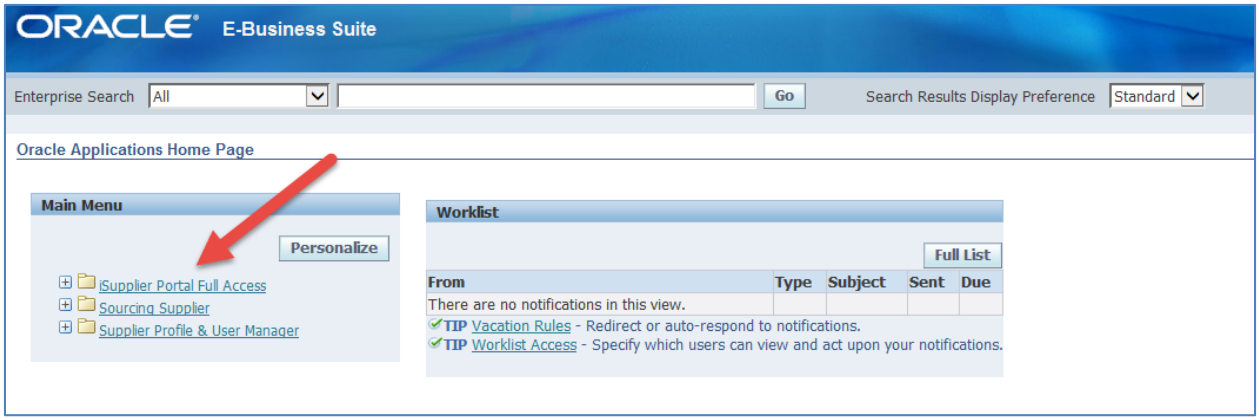
You have now completed set up of your Supplier Profile in the Portal.

All changes to the Supplier Profile require Authority approval; please allow 24 – 48 hours for the approval process to be completed. The System will not allow any additional changes to any record(s) with pending changes within your Profile until the preceding change has been approved or rejected by Authority staff.

iSupplier Portal Full Access

Once the Company has completed set-up of the Supplier Profile, user(s) will have access to Company records via iSupplier Portal Full Access. This is known as a "responsibility" as it grants the user the ability to view and manage a multitude of information concerning interactions between the Company and the Authority.

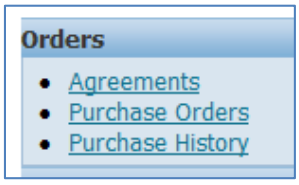
On the Oracle Applications Home Page, a list of your responsibility(ies) appear(s) in the Main Menu.



To view, click on *iSupplier Portal Full Access*. The following page appears:

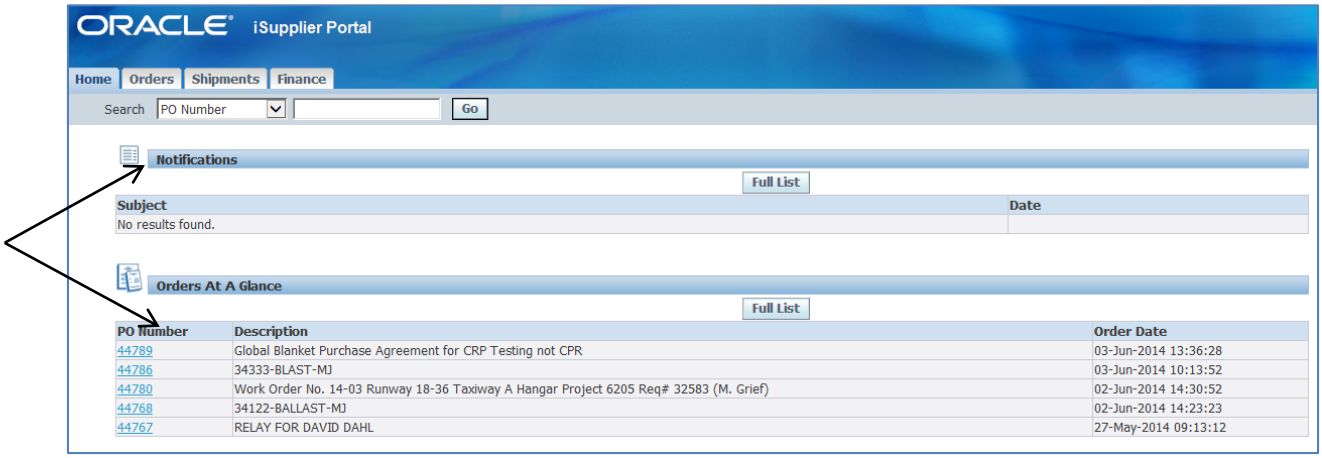
This is the Home Tab. The tabs across the top of the page are the same as the list on the right side of the page. Clicking on the links on the right side of the page will take you to the same place in the Portal that you would go to if you selected one of the tabs at the top and then picked the hyperlink below the tabs.

Example: under Orders on the right is the hyperlink for Purchasing History.



Clicking on the Orders Tab pulls up the page; all hyperlinks are listed just below the tabs.

You are able to view any pending Notifications and Purchase Orders from your Home Page.

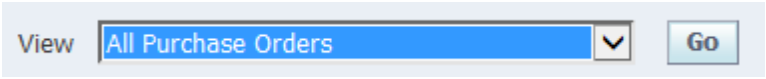


Orders Tab

On the Orders tab, you will have access to the following:

Purchase Orders – this page shows all purchase orders that have been issued to your Company

- To filter POs, click on the View List of Values then click Go



- Click on the PO Number to view an individual PO; Rev will reflect how many times the PO has been revised

PO Number	Rev
10863	0

Agreements – this page lists all "Agreements" created. There are two types:

- Global Blanket Purchase Agreement: this is a purchase order created from an Authority executed Agreement that is for a specific item at a specific price; these are repetitious purchases, made on a regular basis.
- Contract Purchase Agreement: this is a purchase order created from an Authority executed Agreement that is for a set dollar amount with different items at established prices.

PO Number	Revision	Global	Description	Document Type	Buyer	Order Date	Currency	Amount Agreed	Amount Released	Effective-From Date	Effective-To Date	Status
44789	0	Yes	Global Blanket Purchase Agreement for CRP Testing not CPR	Blanket Purchase Agreement	SHOBY, TIM	03-Jun-2014 13:36:28	USD	10,000.00		04-Dec-2013	03-Dec-2014	Open
44746	1	Yes	Global Blanket Purchase Agreement based on WSCA Pricing	Blanket Purchase Agreement	SHOBY, TIM	19-May-2014 09:42:38	USD	10,000.00		04-Dec-2013	03-Dec-2014	Supplier Change Pending
44755	0	Yes	Global Blanket Purchase Agreement based on WSCA Pricing	Blanket Purchase Agreement	SHOBY, TIM	14-May-2014 08:52:41	USD	10,000.00		04-Dec-2013	03-Dec-2014	Accepted
44699	2	Yes	BPA	Blanket Purchase Agreement	JOHNS, MARSHALL D	08-May-2014 10:42:19	USD	5,500.00		05-May-2014	04-May-2015	Closed
44698	0	Yes	MRO State of Florida/WSCA Contract	Contract Purchase Agreement	SHOBY, TIM	06-May-2014 14:30:45	USD	9,500.24		01-May-2014	30-Apr-2015	Open

Purchase History – this page allows you to search for specific POs in order to view the history of all changes made to the specific PO.

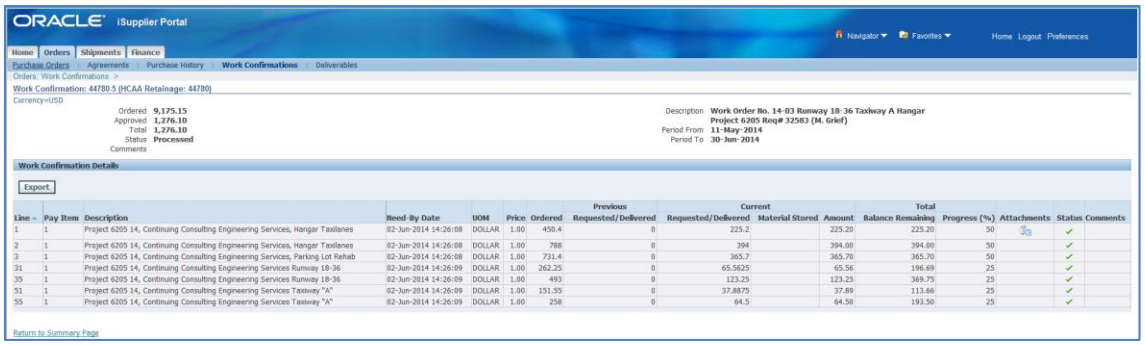
PO Number	Rev	Operating Unit	Description	Buyer	Creation Date	Revised Date	Currency	Total	Ship-To Location	Compare to Original PO	Compare to Previous PO	Show all PO Changes
34137	2	HCAA	CR1-24330-STOCK	HENDRICKSON, RHONDA S	19-Nov-2010 10:13:45	20-Dec-2010 13:56:05	USD	239.10	CENTRAL WAREHOUSE			

Work Confirmations – this page lists all completed work on a project purchase order. A project PO is created for all projects; a work confirmation reflects the work completed for the current period.

- To review a work confirmation, click on the Work Confirmation number.

Work Confirmation
44780-5

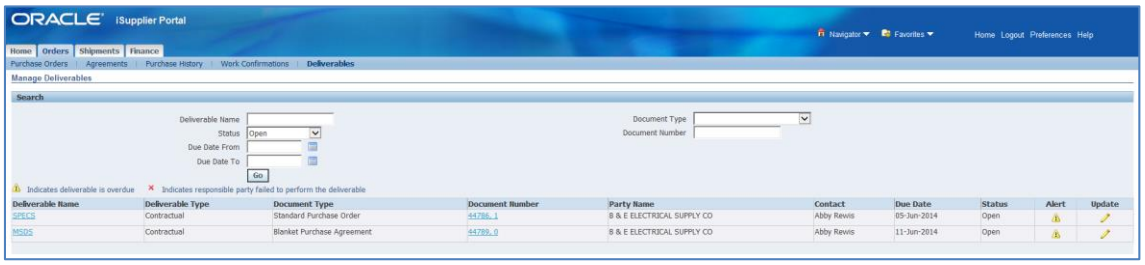
- On this screen, the information for the particular Work Confirmation is shown.



- To Update or Cancel an existing Work Confirmation, click on the radio button next to the specific Work Confirmation then click Update or Cancel. NOTE: Once the Update or Cancel has been submitted, the Work Confirmation cannot be opened until the Authority approves or rejects it.

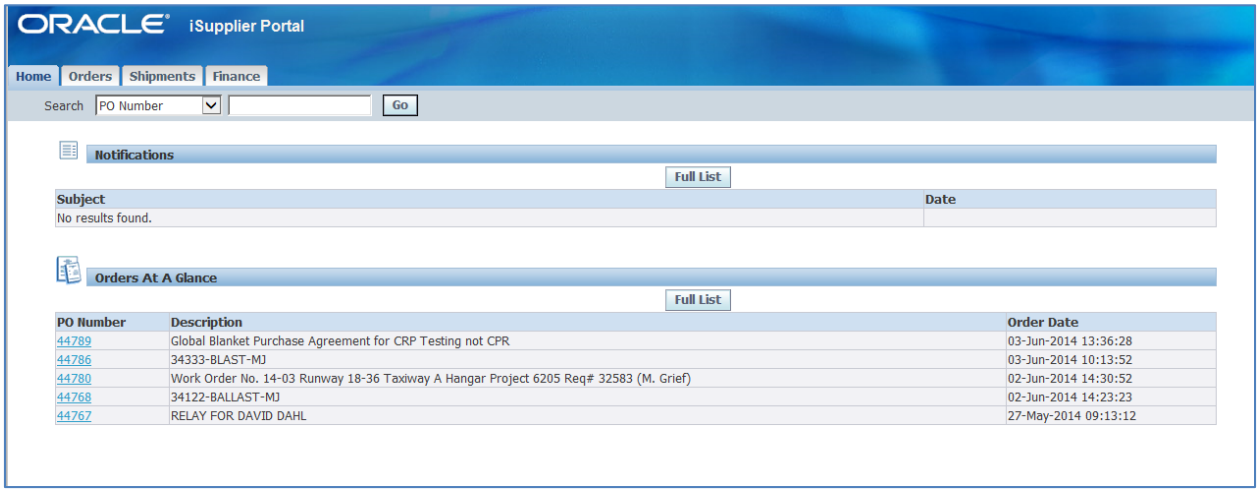
Deliverables – this page allows you to manage all deliverables attached to all purchase orders.

- To filter deliverables, click on the Status List of Values and select a type then click Go.



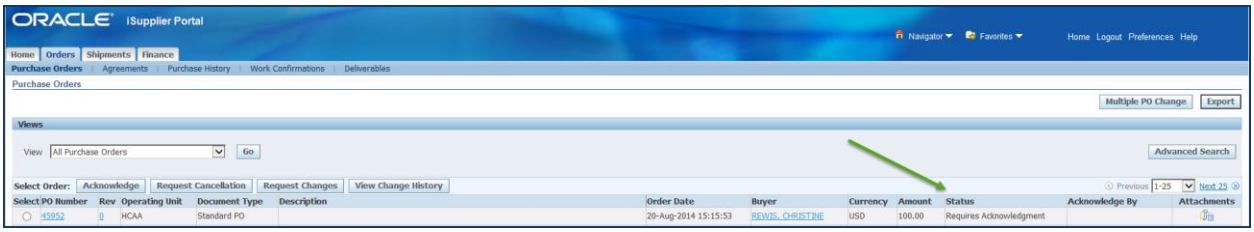
Purchase Orders

Each time a purchase order is issued, you will need to acknowledge the PO. This can be accomplished in one of two ways; directly within the Notifications section or via the Orders Tab.



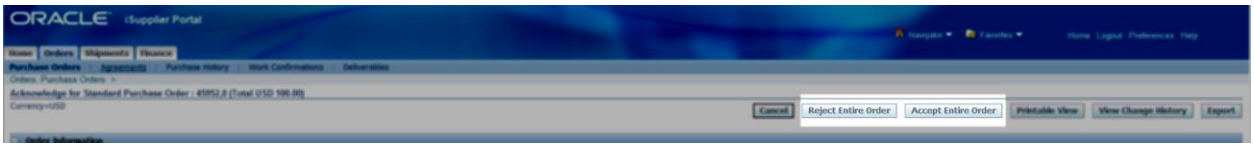
Step	Action
1.	On the **Home Page**, find the pending PO under **Notifications.**
2.	Open the PO or Agreement by clicking on the PO number link.
3.	Open the PDF document to review the order.
4.	Click **Accept** or **Reject** as appropriate. These are located on the right side of the page.

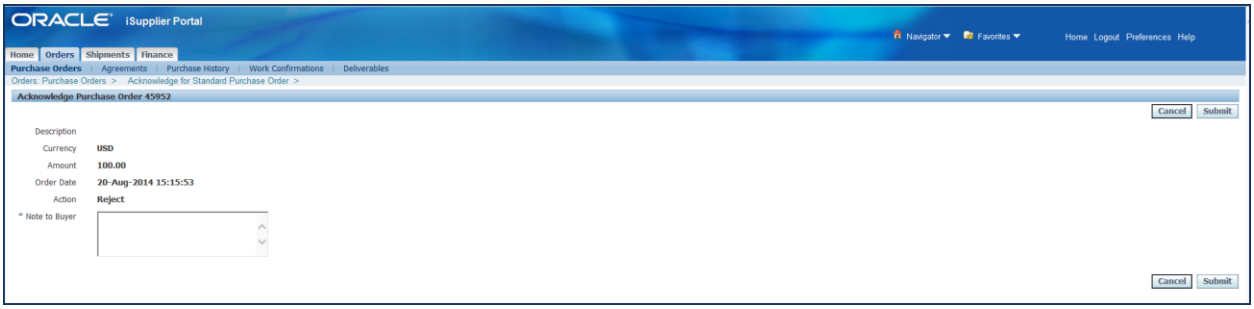
OR

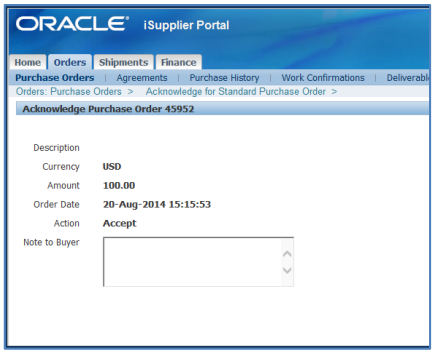


Step	Action
1.	On the **Orders Tab**, find the PO requiring acknowledgement under **Status.**
2.	Click the radio button under **Select**.
3.	Click on the **Acknowledge** button.

4.	Click **Accept Entire Order** or **Reject Entire Order** as appropriate.
5.	Enter Note to Buyer.
6.	Click **Submit**.

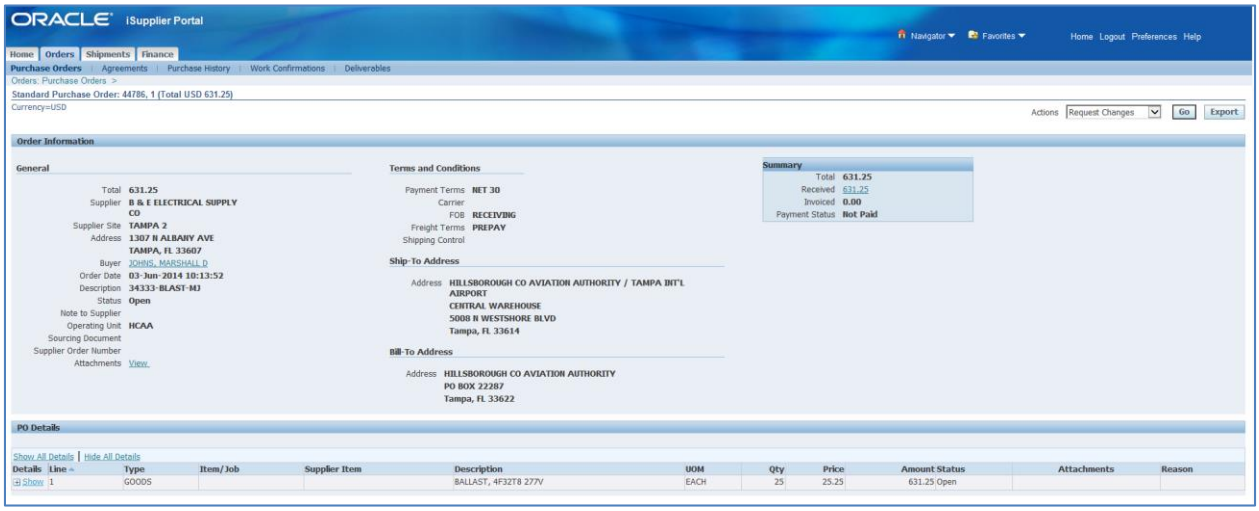


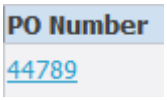
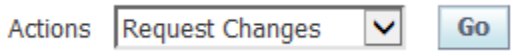
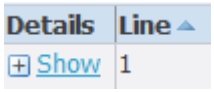




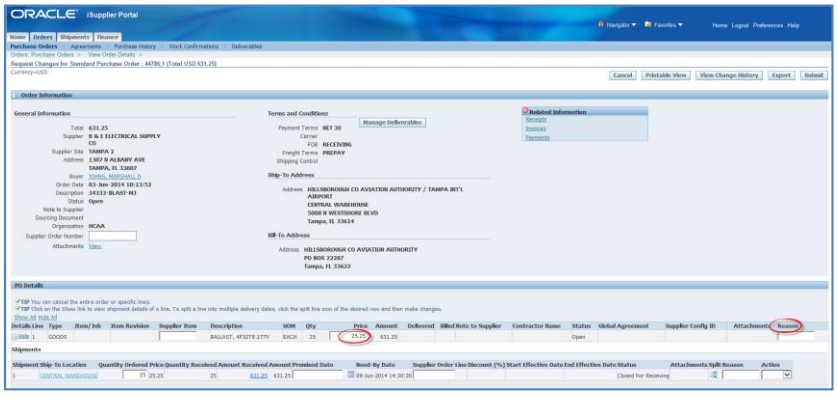
Request Changes to Purchase Orders

Occasionally, you may find a need to request a change to an existing purchase order. From the Orders Tab, click on the Purchase Orders link to take you to the Purchase Orders page.



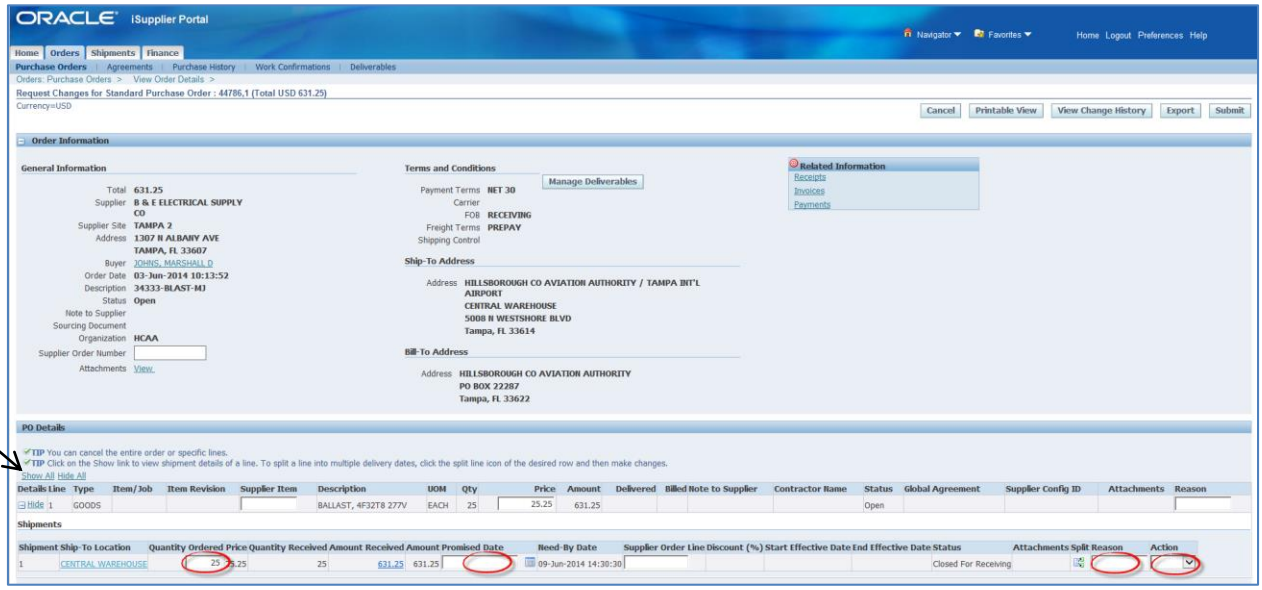
Step	Action
1.	Click on the purchase order number to be changed under **PO Number.** This is a link to the purchase order. 
2.	From the Actions **List of Values**, select **Request Changes.** Click **Go.** 
3.	Under **Details,** click on **Show** to see the details of the line. 

To change the price, simply type over the number under Price and then provide the reason for the change in the Reason field.

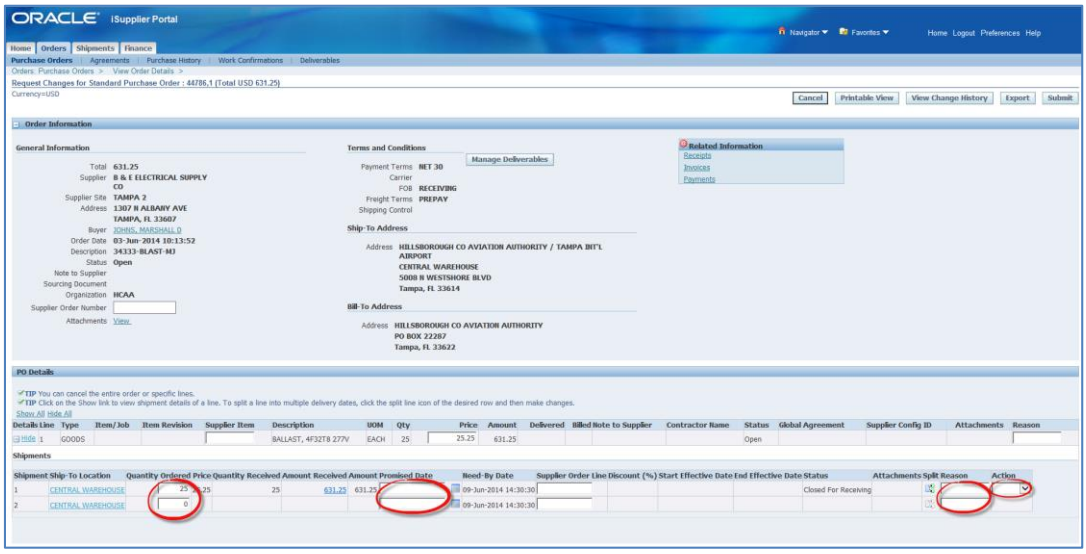


To change quantities or delivery information, go to the Shipments line, click on Show All then make the appropriate corrections to any of the following fields:

- Quantity Ordered
- Promised Date
- Reason
- Action (select Change)

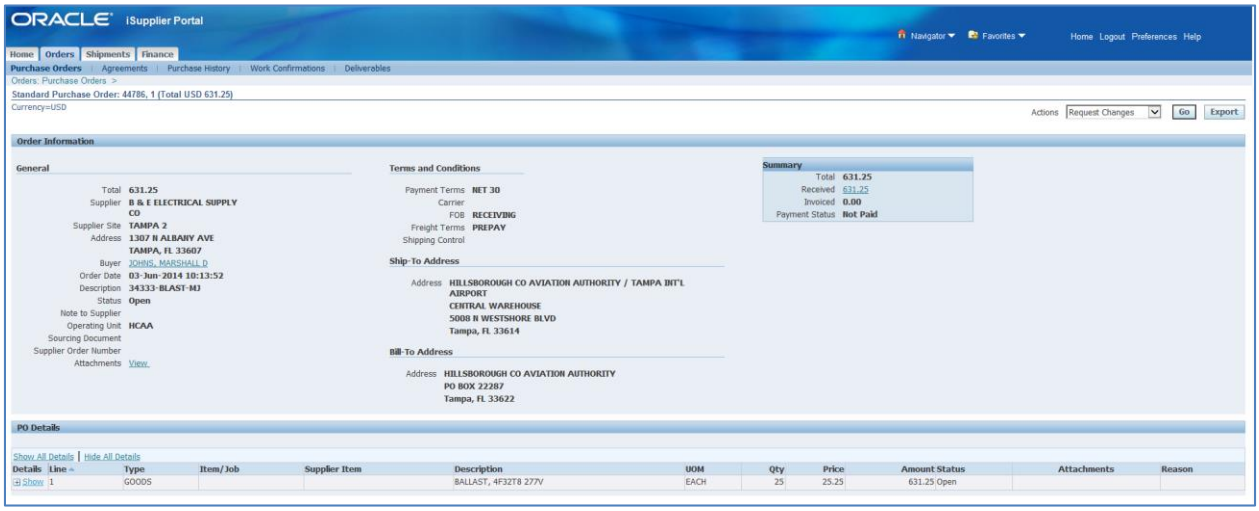


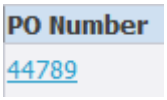
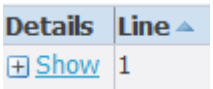
If, for some reason, the delivery has to be split into multiple shipments, you will follow the same steps as above. Additionally, you will click on the icon under Split to create a second shipment line. The Quantity Ordered, Promised Date and Reason fields will be updated in accordance with the new shipment schedule.



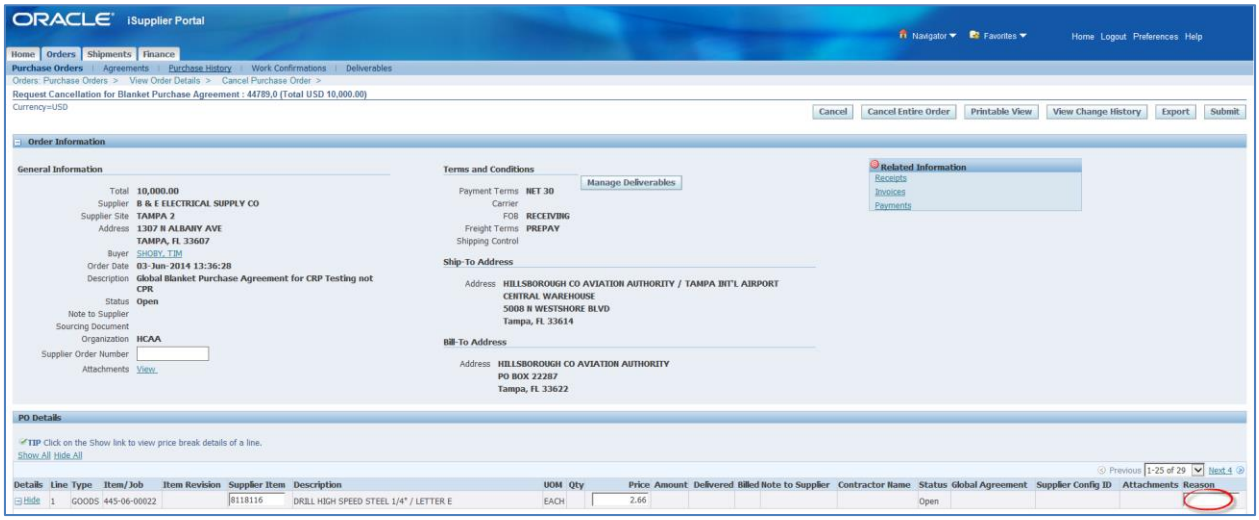
Request a Cancellation to a Purchase Order

You will follow the same steps to cancel a purchase order as you do to request a change to a purchase order.



Step	Action
1.	Click on the purchase order number to be cancelled under **PO Number.** This is a link to the purchase order. 
2.	From the Actions **List of Values**, select **Request Cancellation.** Click **Go.**
3.	To cancel the entire PO, click on **Cancel Entire Order.**
4.	Provide a **Reason for Cancellation** then click **Submit.**
5.	To cancel an individual line, click on **Show** under **Details,** to see the details of the line. 

When cancelling a PO, you will need to provide the reason for the cancellation in the Reason field.



Agreements

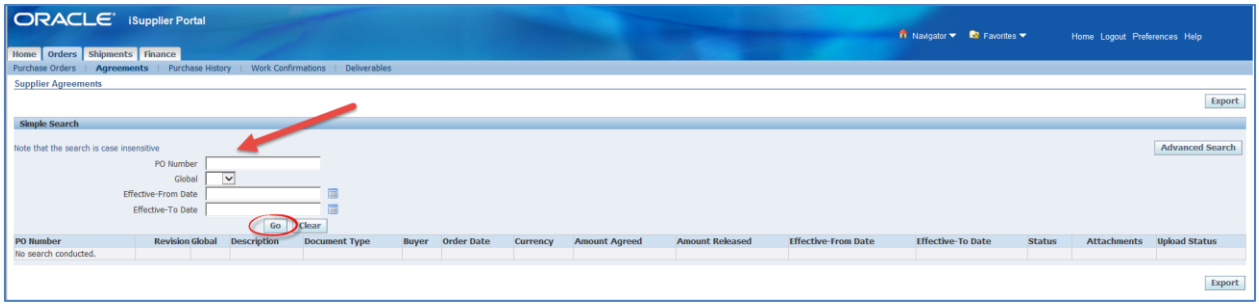
As explained earlier in this manual, Agreements are purchase orders that have been created because your Company has entered into a contract with the Authority.

There are two types of Agreements:

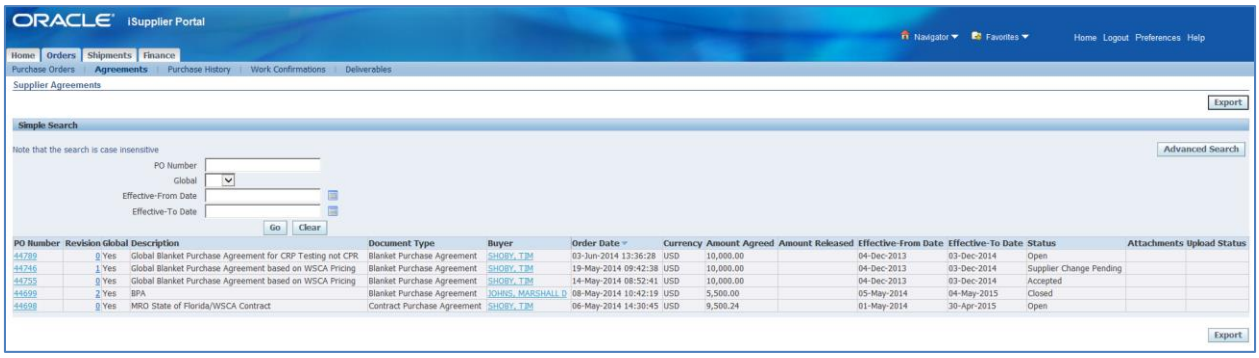
- Global Blanket Purchase Agreement: this is a purchase order created from an Authority executed Agreement that is for a specific item at a specific price; these are repetitious purchases, made on a regular basis.
- Contract Purchase Agreement: this is a purchase order created from an Authority executed Agreement that is for a set dollar amount with different items at established prices. These are regular purchases that will vary from purchase to purchase.

Just as with a standard purchase order, you are able to request changes or request cancellation of an Agreement. Refer to those sections if you need to request a change or a cancellation.

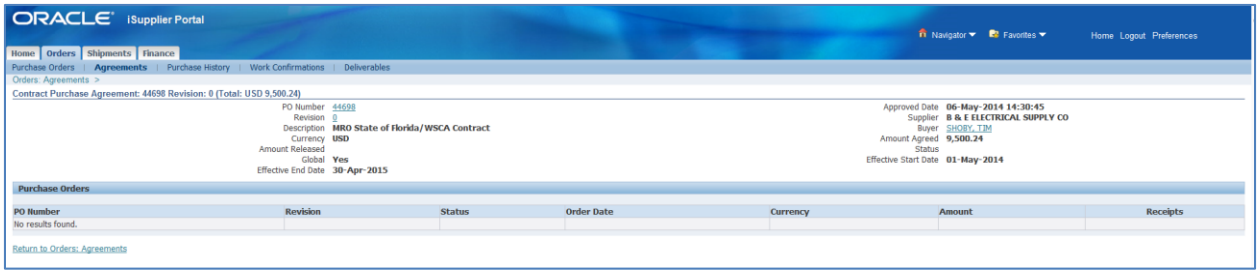
Under the Orders Tab, click on Agreements to see all Agreements issued to your Company. On this page, you can type in the PO Number if you have it or you can click Go to pull all Agreements.



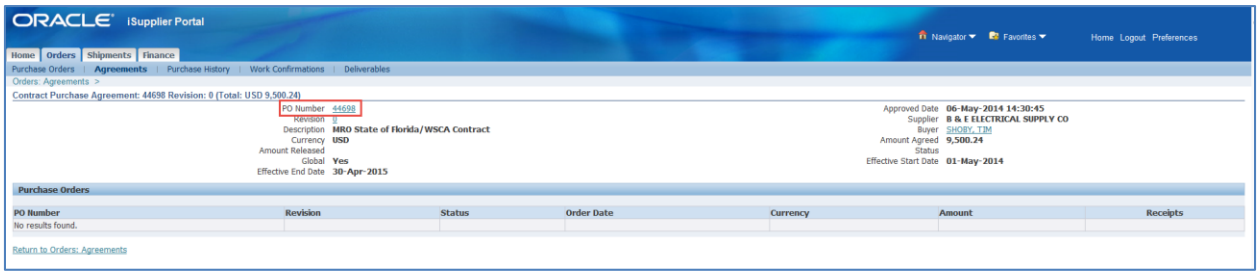
This is what you will see:



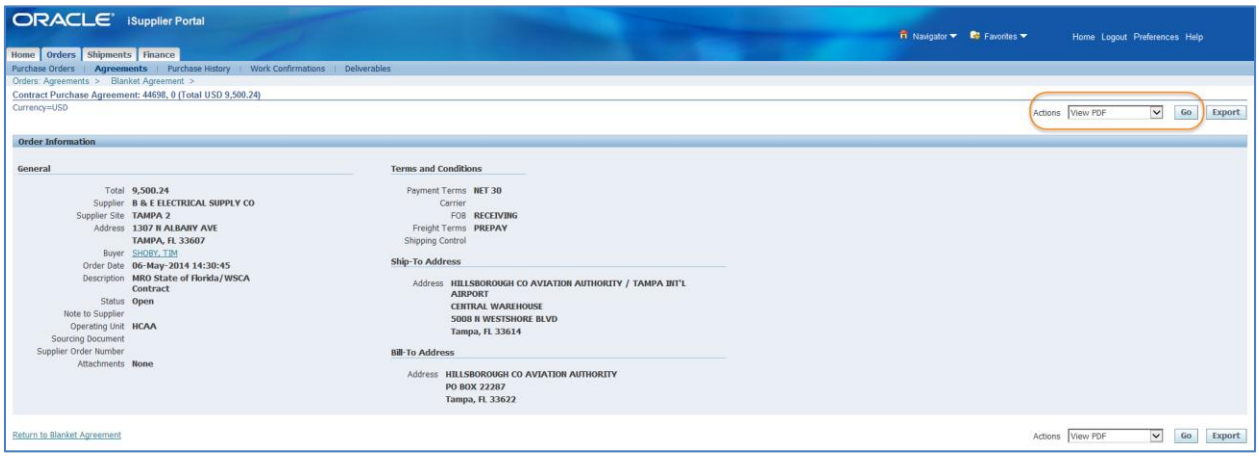
If you click on the purchase order number link under PO Number, the System takes you to the header information.



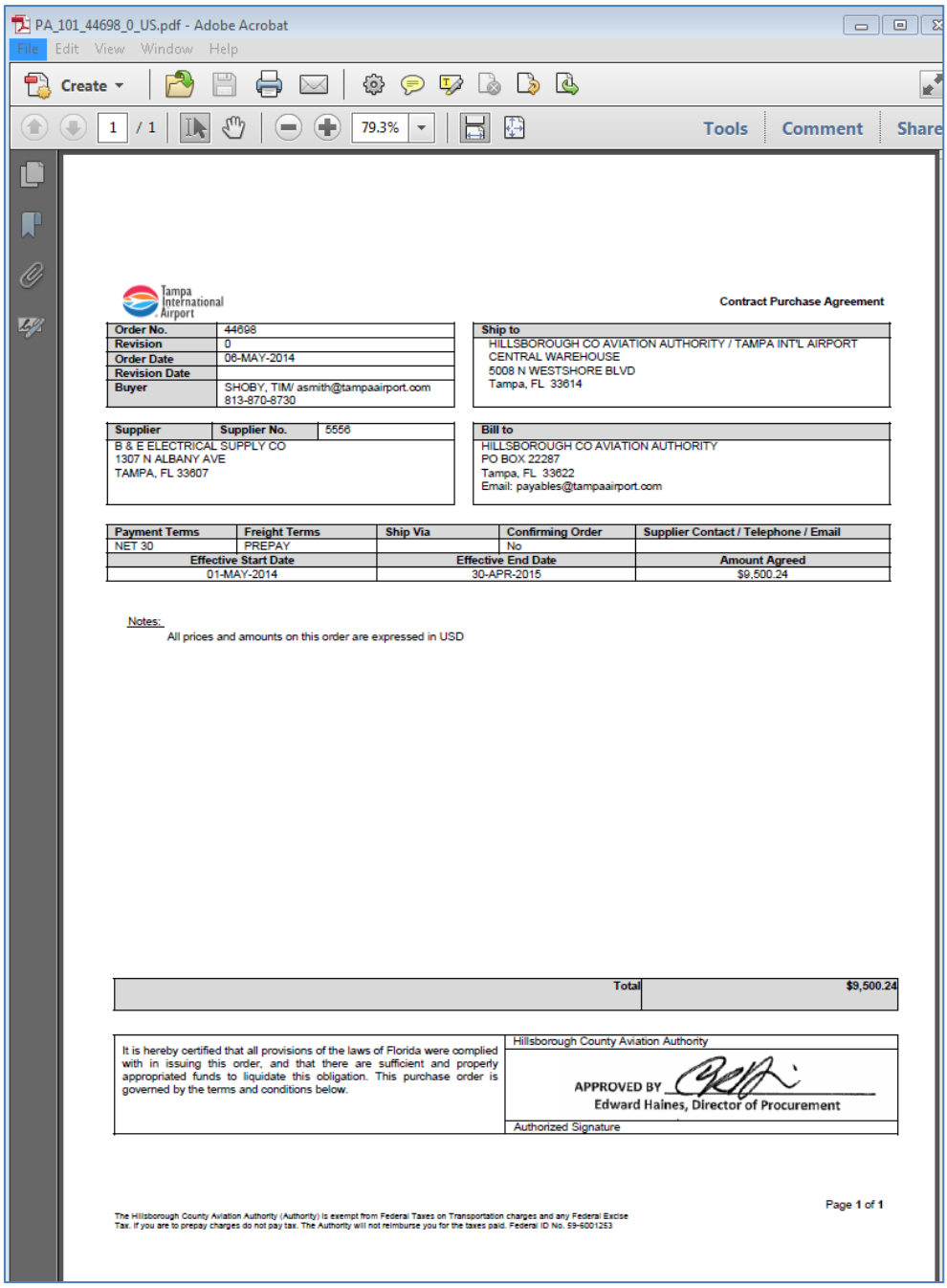
You can click on the PO Number link to view a copy of the entire purchase order.



General information concerning the purchase order appears. From the Actions List of Values, click on View PDF then click Go. This will bring up the purchase order in PDF.



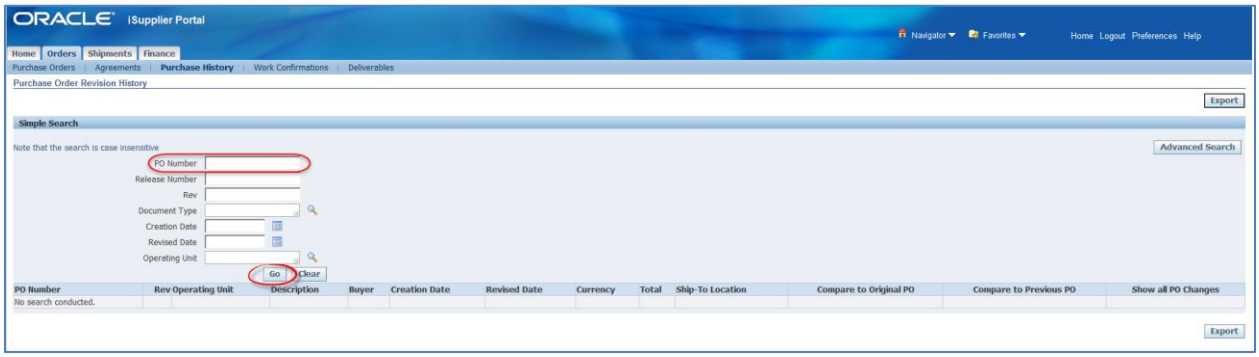
This is what you will see:



Click on Return to Blanket Agreement then Return to Orders: Agreements to return to the list of Agreements. Both links are found on the bottom left side of your screen. This will be true for Contract Purchase Agreements as well.

Purchase History

To view the history of a purchase order, click on the Orders Tab then on the Purchase History link. You can type in the purchase order number in the PO Number field then click Go if you want to view a particular PO or simply click Go to pull up all purchase orders issued to your Company.

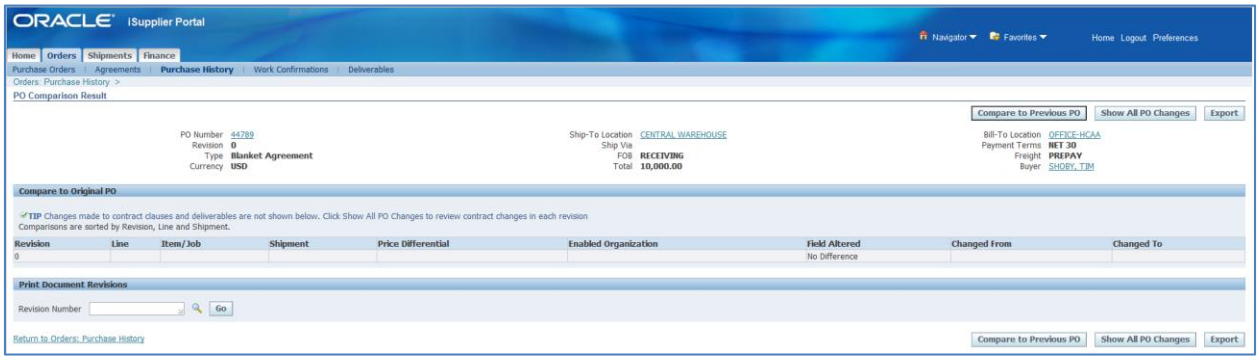


When looking at PO history, you have the option to take one of the following actions:

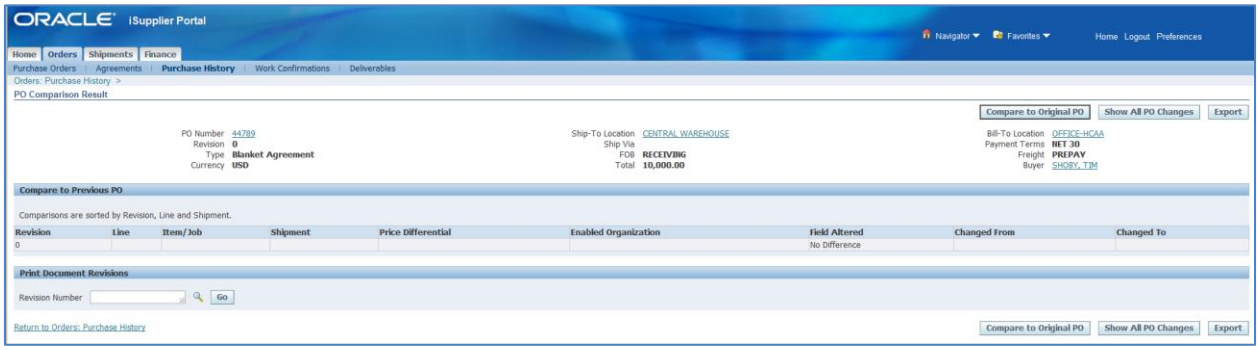
- Compare to Original PO
- Compare to Previous PO
- Show all PO Changes

Simply click on the page icon below the appropriate action.

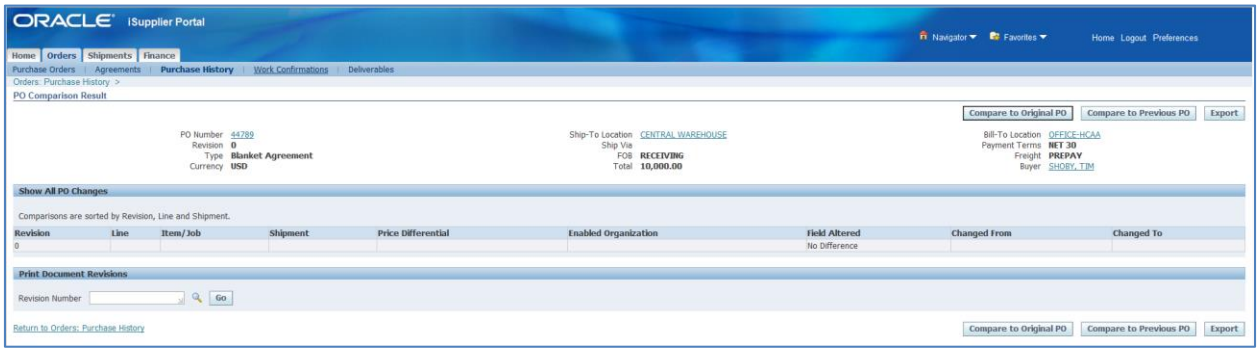
Compare to Original PO



Compare to Previous PO



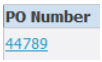
Show All PO Changes



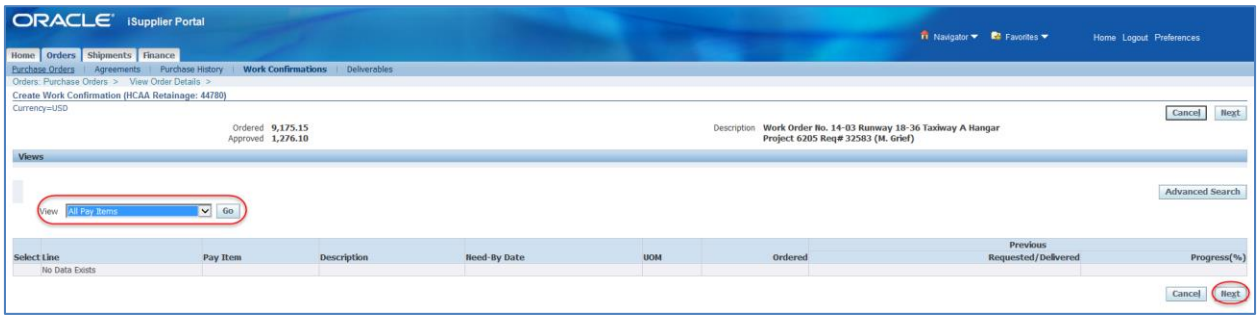
Work Confirmations

Work Confirmations are project submittals that detail the percentage of work and stored materials (if applicable) for the current period on a construction contract. Creating the Work Confirmation is done via the Purchase Orders link on the Orders Tab; viewing Work Confirmations is done from here as well.

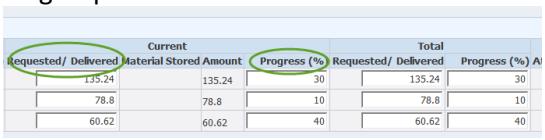
Create Work Confirmation

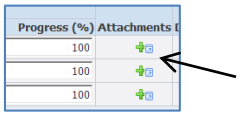
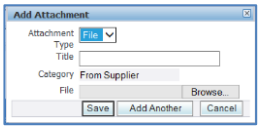
Step	Action
1.	From the Orders Tab, click on the Purchase Order link. This is a link to the list purchase orders issued to the Company.
2.	Click on the PO number under **PO Number** that you are creating a Work Confirmation against. 
3.	From the Actions **List of Values**, select **Create Work Confirmation.** Click **Go.**

This is the screen that will allow you to create the work confirmation.



Step	Action
4.	The line(s) of the purchase order are shown, with a checkbox for each line under **Select**. Check each box for each line you have completed work for within the current period. Then click **Next**.
5.	Enter the Work **Confirmation Number** and the **Period of Performance**.

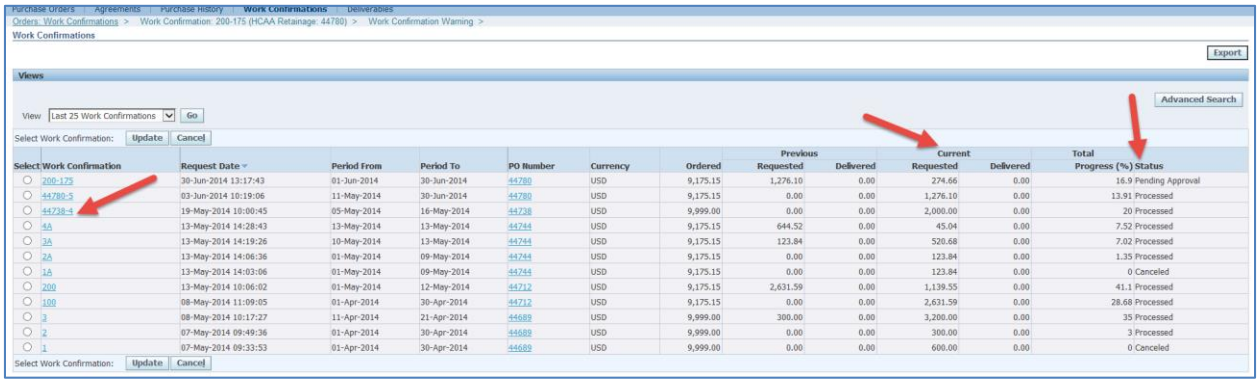
6.	Enter the amount being requested. This is either a **dollar value or progress percentage**,  then click **Submit.**

You should attach supporting documentation to each Work Confirmation. This can be done  when you are entering the amount or percentage of current work completed. Click on the **+** to get the **Add Attachment** section open. Attach a file, fill in a URL address or provide text in the attachment and click **Save.** 

View Work Confirmations

Step	Action
7.	From the **Purchase Orders link on the Orders Tab**, click on **Work Confirmations**. From the **View** List of Values you can select one of the following: • **Last 25 Work Confirmations** • **Draft Work Confirmations** • **Rejected Work Confirmations** • **All Work Confirmations.** Click **Go.**
8.	Click on the **Work Confirmation Number** under **Work Confirmation** you want to view. The amount requested is shown, as is the progress percentage complete.

This is a view of all Work Confirmations to date.



Update (Cancel) Work Confirmations

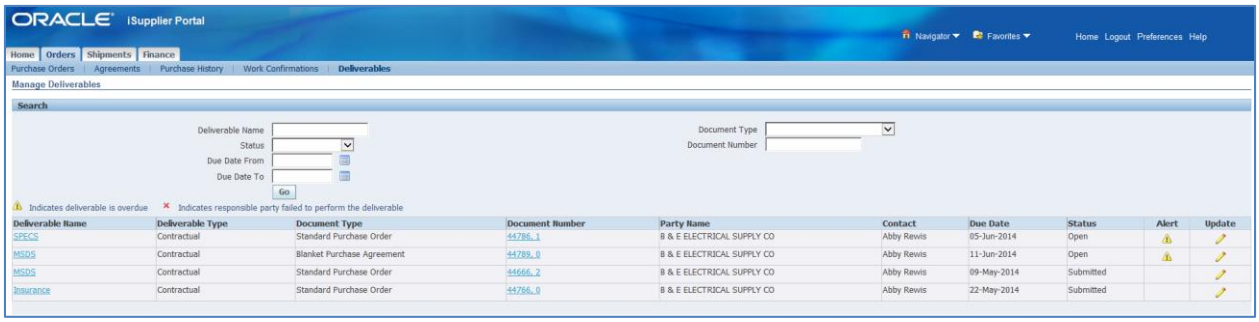
Step	Action
9.	From the **Purchase Orders link on the Orders Tab**, click on **Work Confirmations**. From the **View** List of Values you can select one of the following: • **Last 25 Work Confirmations** • **Draft Work Confirmations** • **Rejected Work Confirmations** • **All Work Confirmations.** Click **Go.**
10.	Check the radio button under Select next to the **Work Confirmation** you want to update. Click **Go.**
11.	**NOTE:** you can only update or cancel Work Confirmations that are in a status of **Draft or Rejected.**
12.	You are able to change the **current delivered amount or percentage** only.

Manage Deliverables

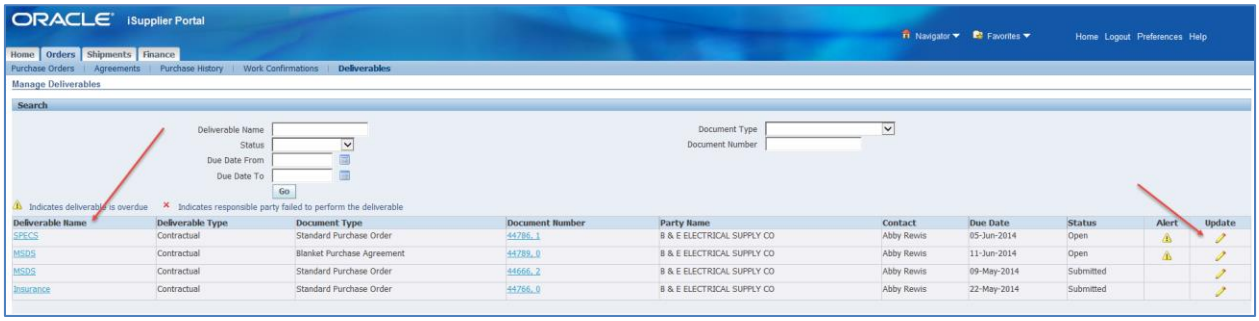
Deliverables are items that you, as the Supplier, are required to provide. Generally, these are such things as insurance certificates, Material Safety Data Sheets, or other forms of documentation to complete the terms of the purchase order.

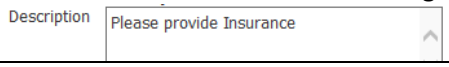
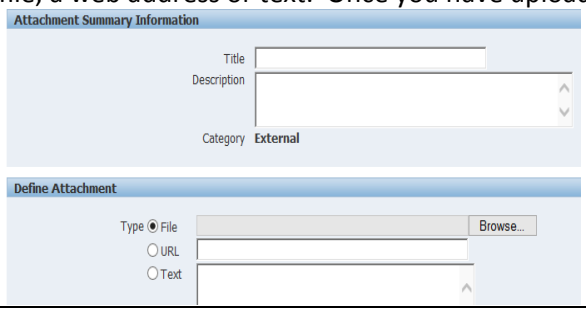
Deliverables can be found either directly from the Deliverables link on the Orders Tab or through the Actions List of Values on an individual purchase order.

Here is an example of a list of deliverables:



To respond to a deliverables request from this page, click on the pencil icon below Update on the line for the deliverable you are responding to.



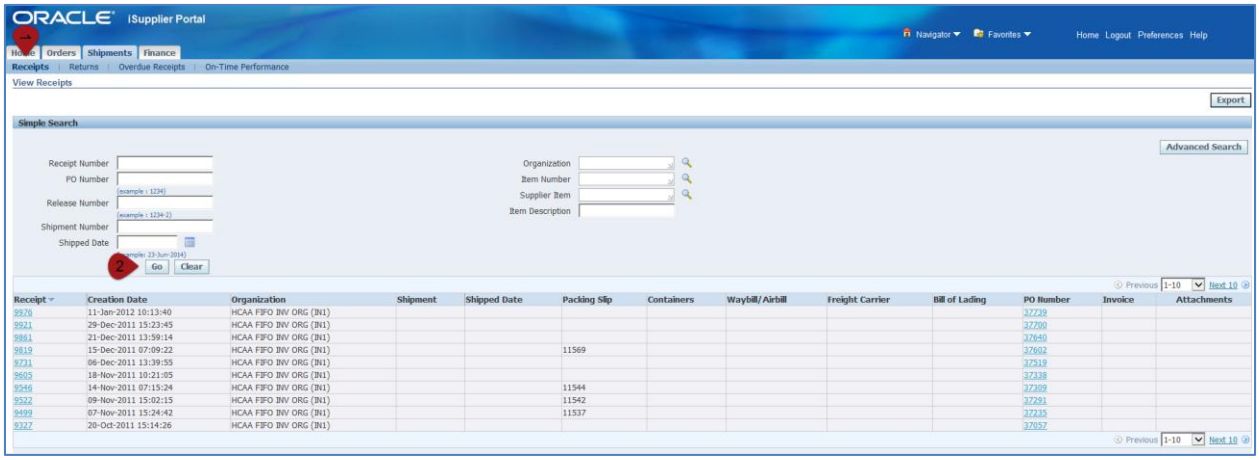
Step	Action
1.	On the **Update Deliverable page**, the **Description** field will provide the specific information or documentation being requested. 
2.	Click the **Add Attachment** box and provide the information requested. This can be a file, a web address or text. Once you have uploaded the information, click **Apply.** 
3.	Click on the Status List of Values and change the option to **Submitted.** Click **Apply**.

Shipments Tab

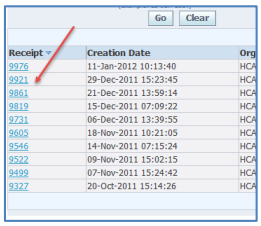
The Shipments Tab will provide information regarding the goods or services provided by your Company to the Authority. In this section of the Portal, you are able to view current receipts, returns, overdue receipts and your Company's on-time performance.

View Receipts

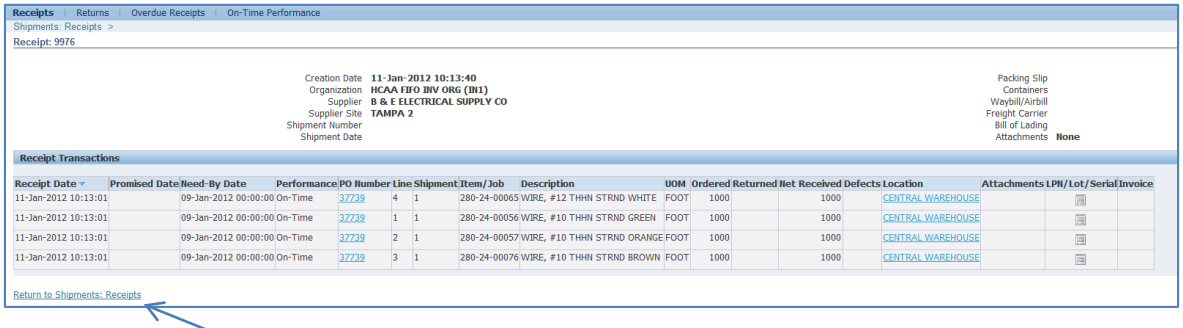
To view a list of all receipts, click on the Receipts hyperlink below the Shipments Tab then click the Go button.



Click on the Receipt Number to view individual receipts.



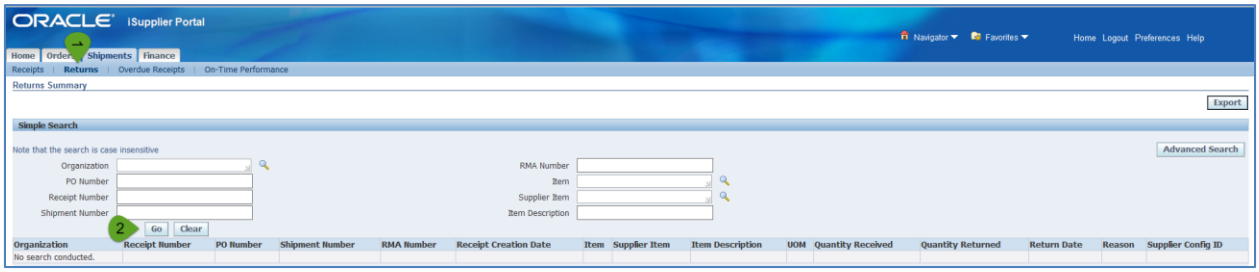
Here is an individual receipt:



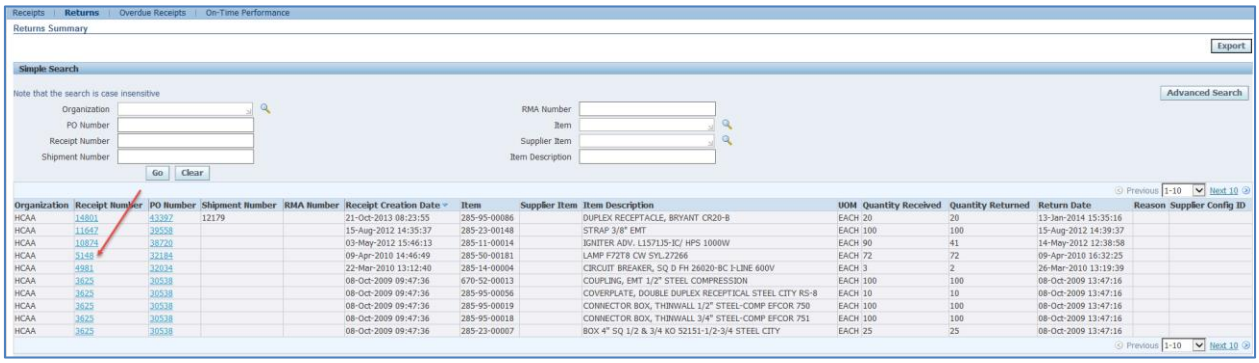
To return to the Receipts page, click the hyperlink at the bottom of the page.

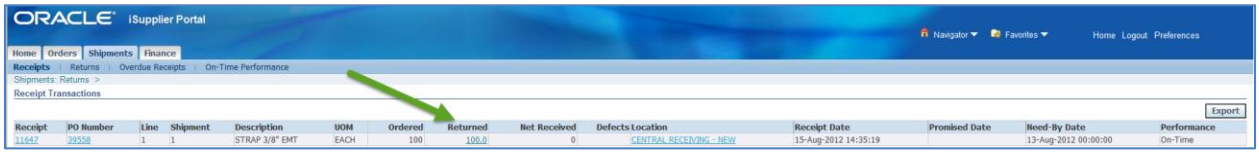
View Returns

To view a list of returns, click on the Returns hyperlink below the Shipments Tab then click the Go button.



Click on the Receipt Number to view individual returns.

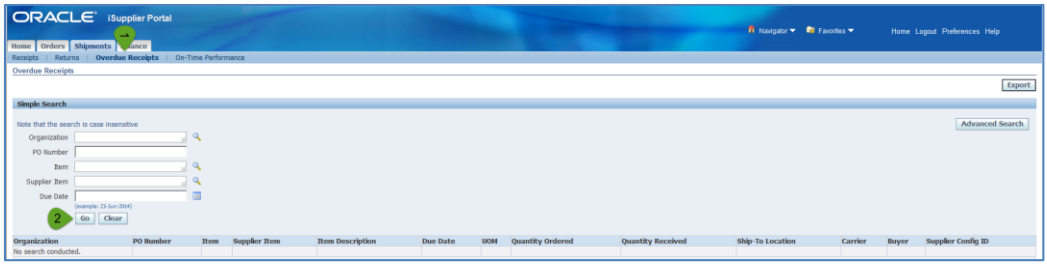




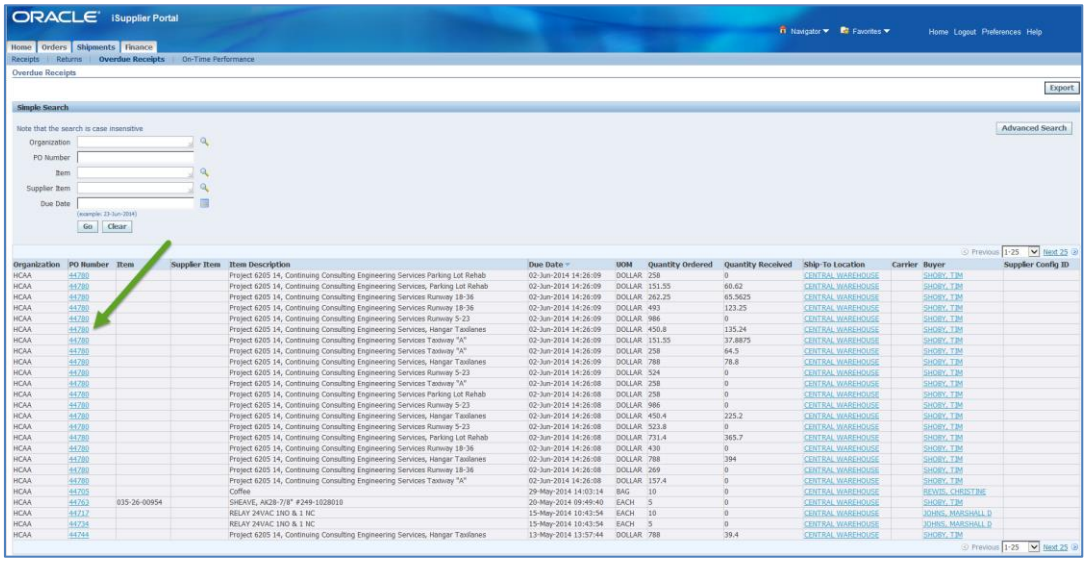
Click on the hyperlink at the bottom of the page to return to the Returns page.

View Overdue Receipts

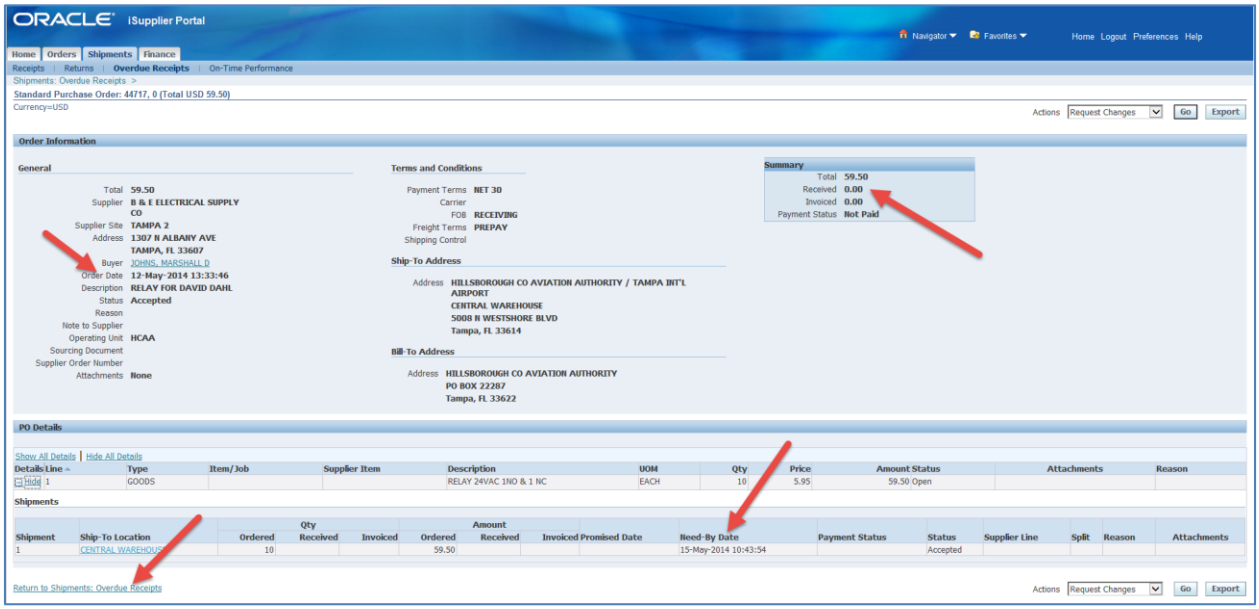
Overdue Receipts are those shipments that were not delivered on time. To view of list of Overdue Receipts, click on the Overdue Receipts hyperlink below the Shipments Tab. Click Go to get a list.



Click on the PO Number to view an individual shipment that was not received on time.

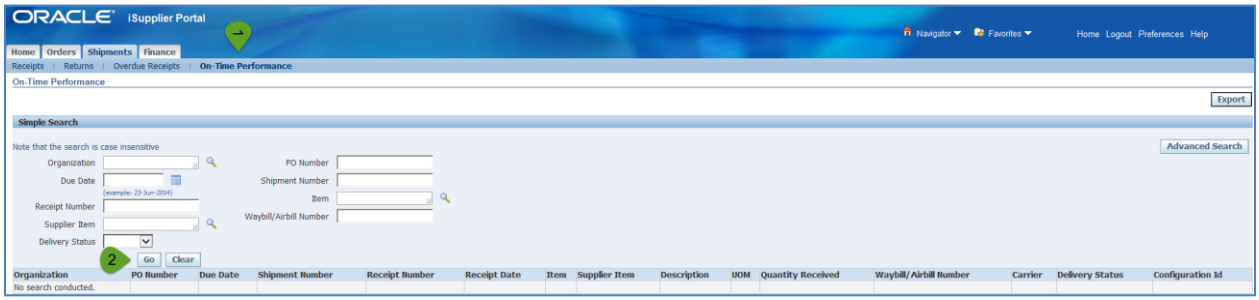


The illustration below reflects the Order Date (12-May-2014), the Need-By Date (15-May-2014), and the Received amount (0.00). To return to the list of Overdue Receipts, click on the hyperlink at the bottom of the page.



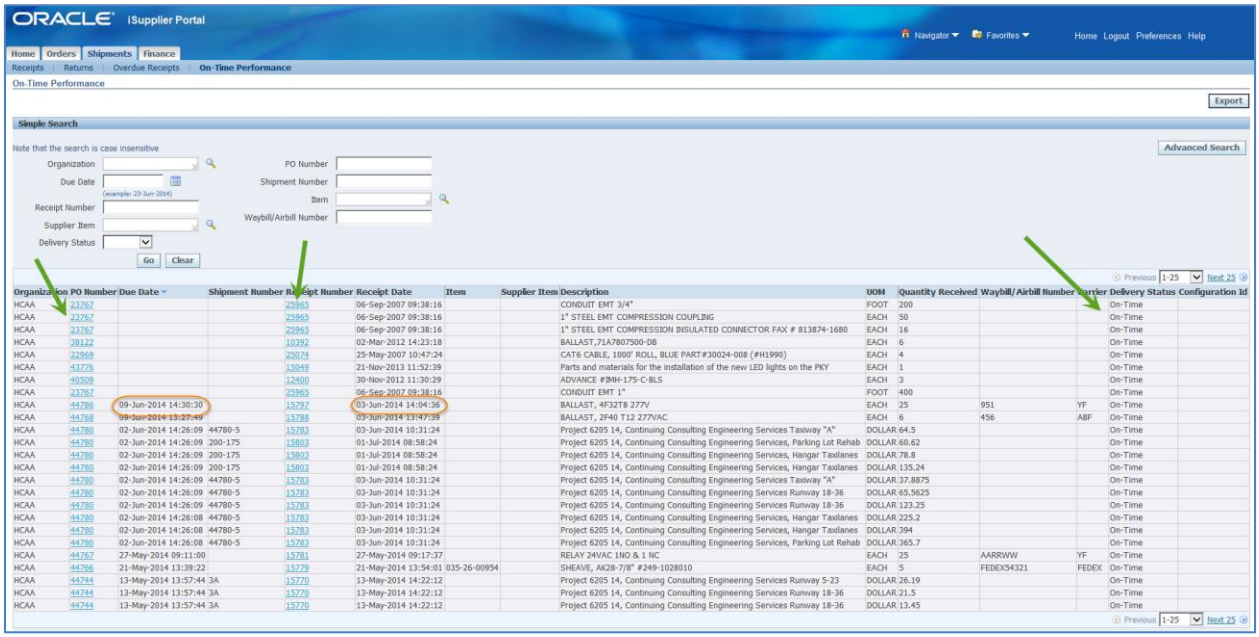
View On-Time Performance

Click on the On-Time Performance hyperlink below the Shipments Tab to view all shipments that were received on time.



On this page, you are able to view the Purchase Order Number, the Receipt Number, and the Delivery Status of a particular shipment. In addition, you can view the Due Date and Receipt Date.

The PO Number and Receipt Number are hyperlinks to the individual purchase order or receipt. Click on either to view the applicable information.

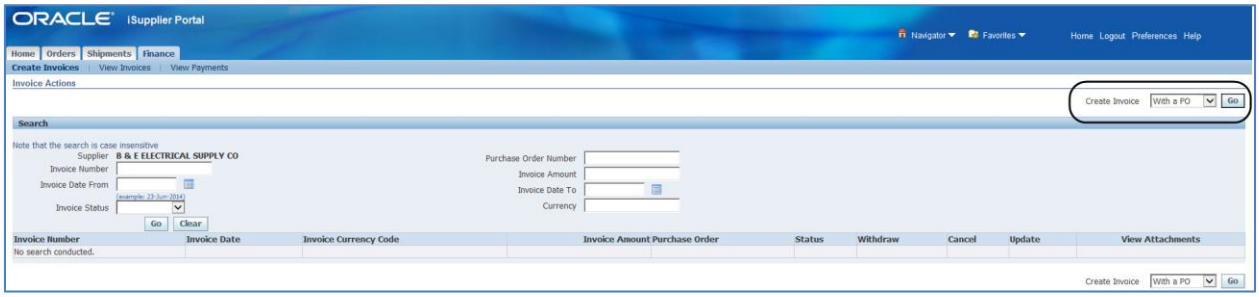


Finance Tab

The Finance Tab is where you will create invoices, view invoice status, and view payment status.

Create Invoice With a PO

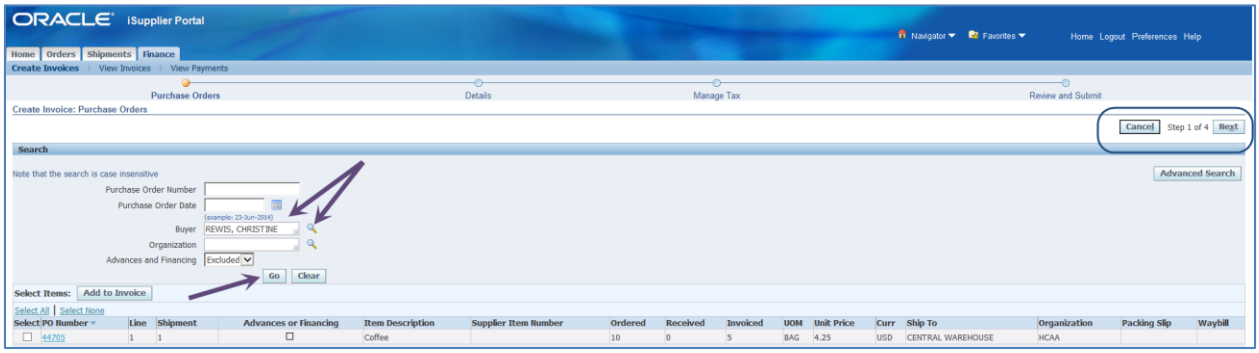
To create an invoice that has an existing purchase order, make sure the Create Invoice List of Values indicates “With a PO” then click Go.



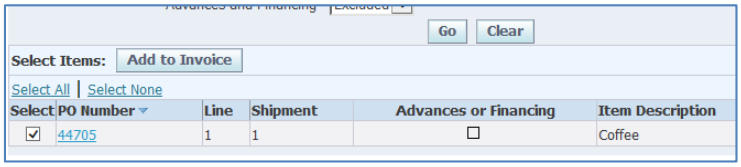
The Portal will request that you fill in one of the Search fields:

- Purchase Order Number
- Purchase Order Date
- Buyer
- Organization

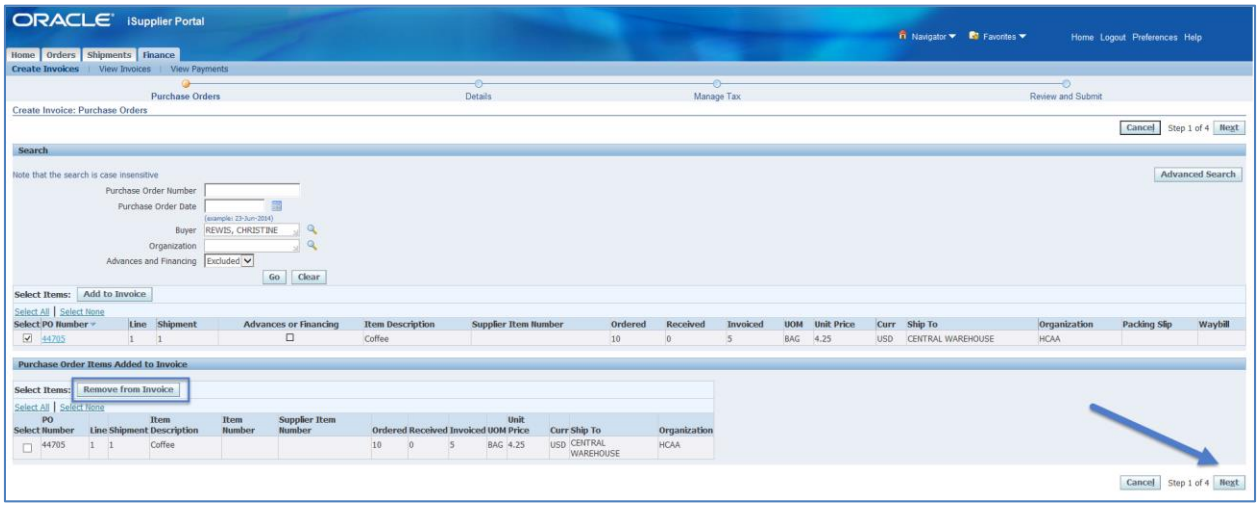
Most of the time you should fill in either the Purchase Order Number or the Buyer. If you choose to fill in the Buyer’s name, click on the magnifying glass then click Go.



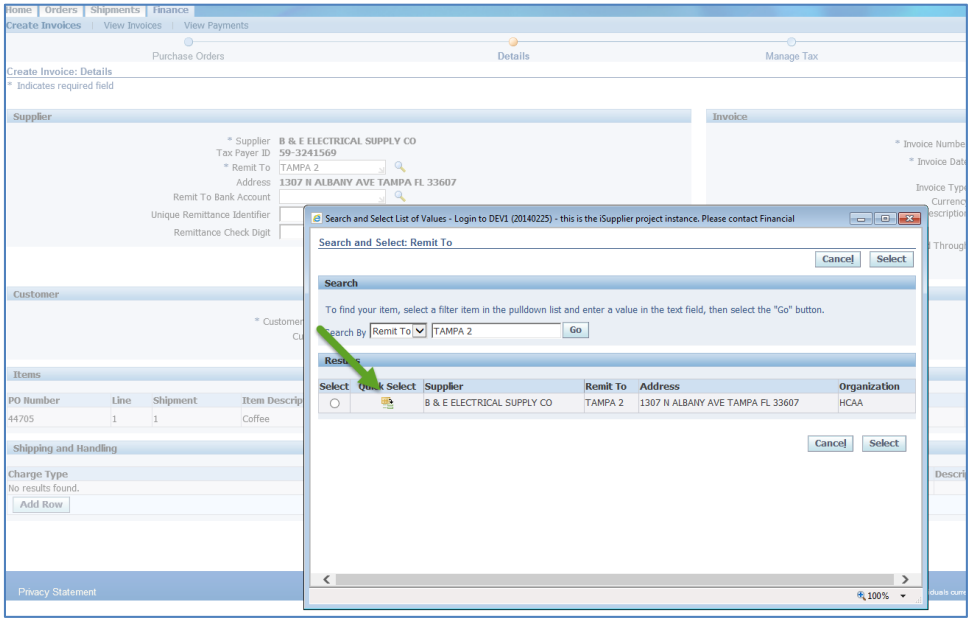
Check the box next to the PO Number that you want to invoice. Click the Add to Invoice button.



If this is the incorrect PO Number, you have the opportunity to remove it. If it is correct, click Next. This is Step 1 in the process.



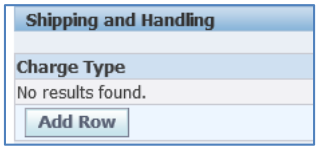
All Supplier information should populate automatically; if the Remit To address is incorrect, click on the magnifying glass to pull up a list of addresses. Click on the Quick Select button to choose the correct address.



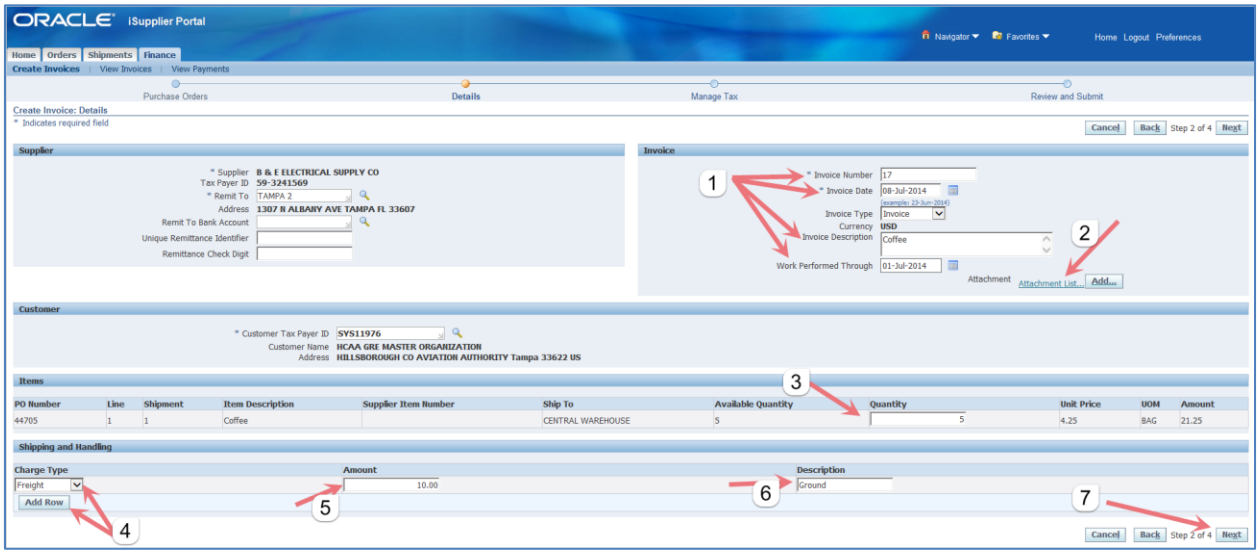
The following fields should be completed (if an asterisk is next to the field name, it is a required field):

- Invoice Number
- Invoice Date (may auto-populate)
- Invoice Description
- Work Performed Through
- Attachment (this is not a fillable field; you should attach documentation to support the invoice)
- Quantity

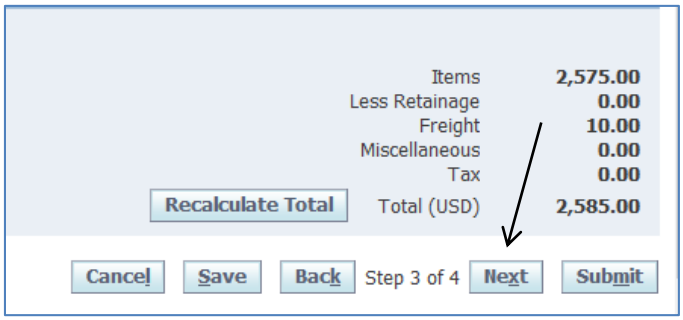
If there are additional charges that need to be added, click on "Add Row" below Charge Type.



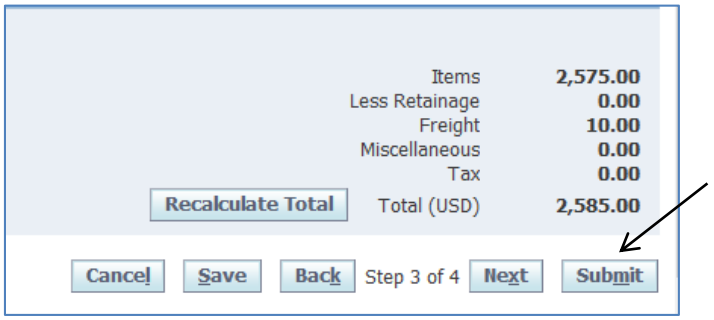
You can add Freight or Miscellaneous charges here. Once you have provided all the information requested on the page, click Next. This is Step 2.



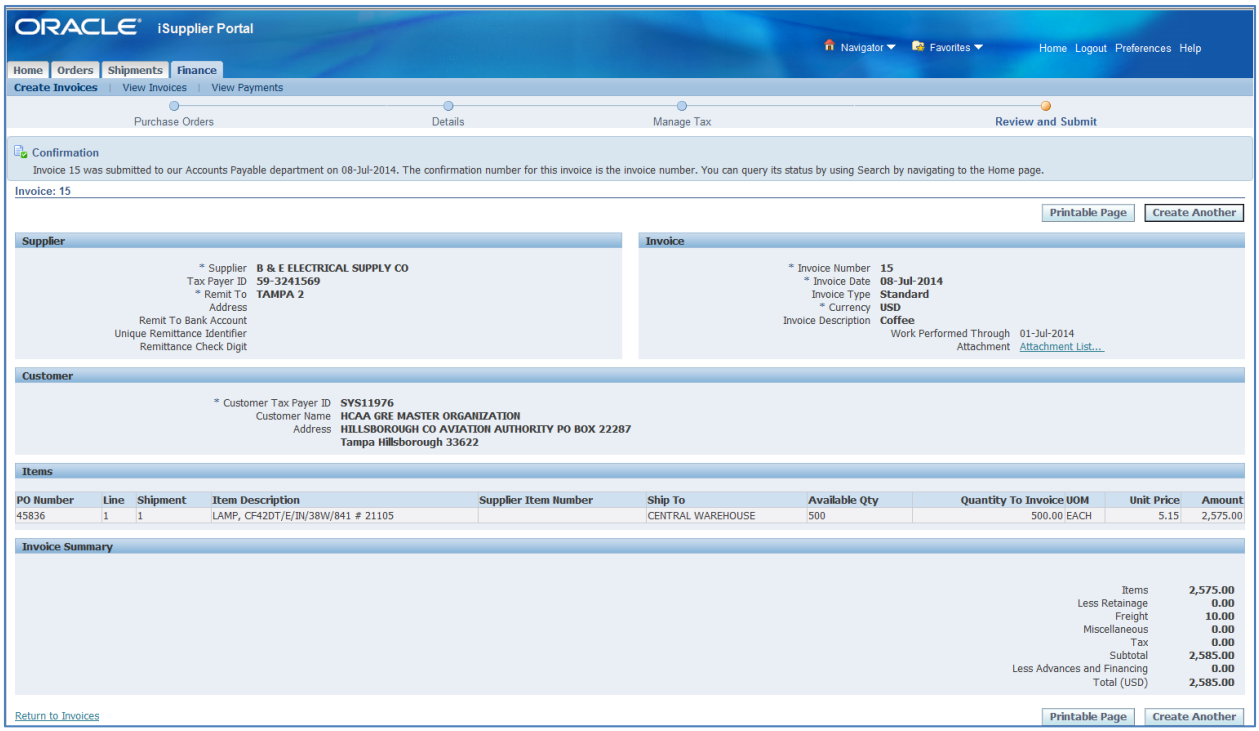
Step 3 is the "Manage Tax" page. There is nothing required on this page so click Next.



Click Submit to complete the invoice.

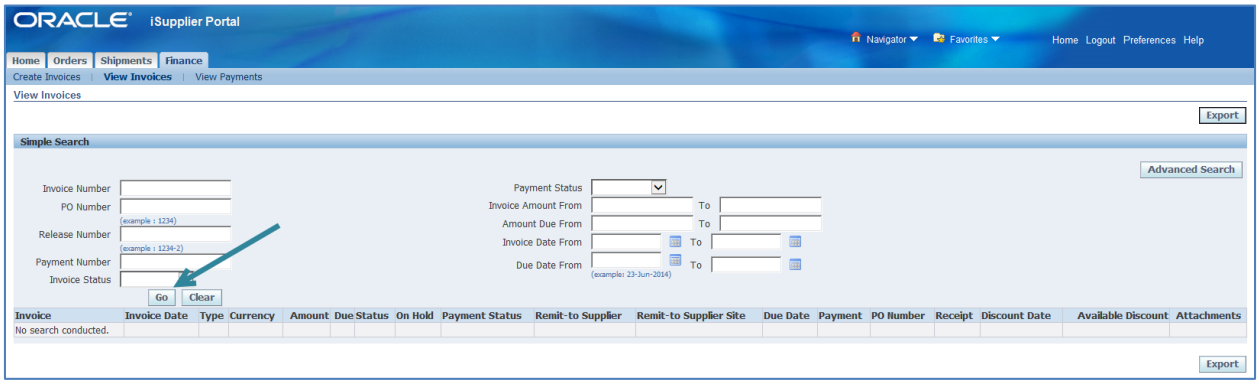


This is a completed invoice:



View Invoices

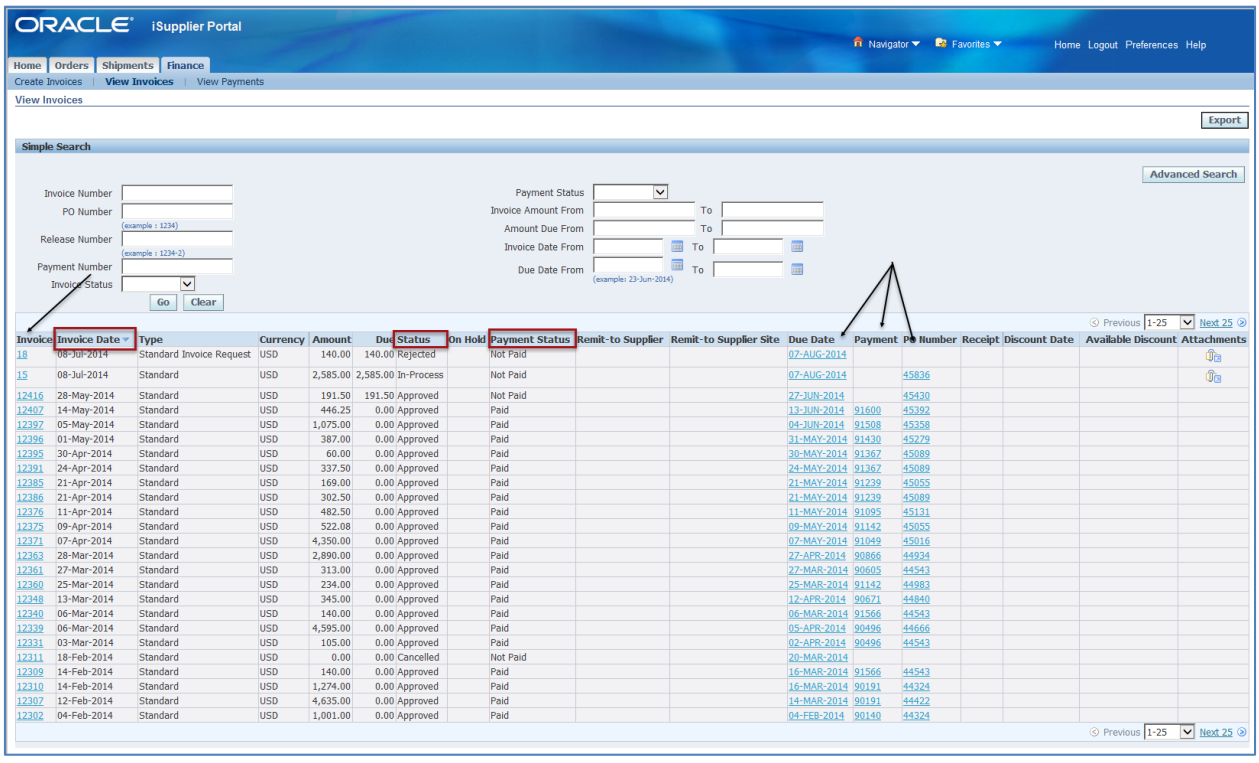
To view the status of an invoice, click on the View Invoices hyperlink under the Finance Tab. You can search by any of the fields listed or simply click Go to view a list of all invoices.



The list allows you to look at the following:

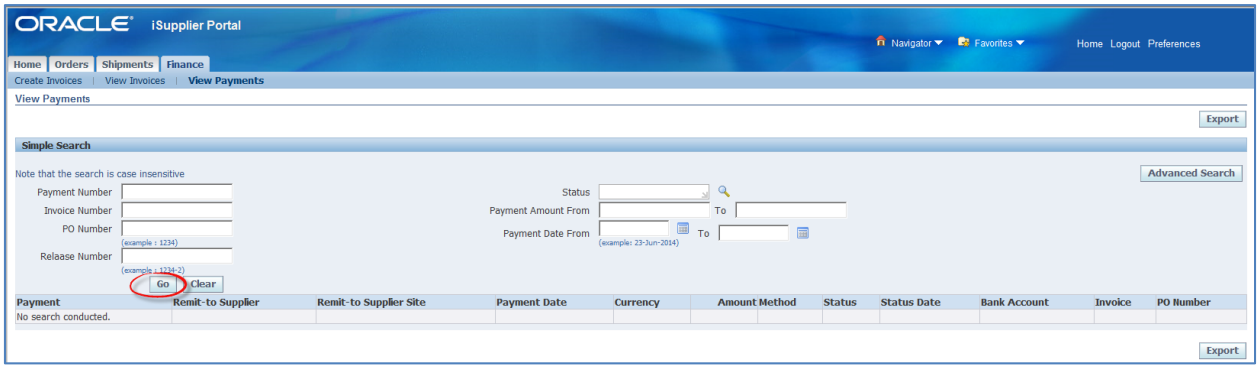
- An individual invoice (Invoice)
- Due Date
- Payment (check number)
- PO Number

The page also provides the date the invoice was submitted, the status of the invoice and the payment status.



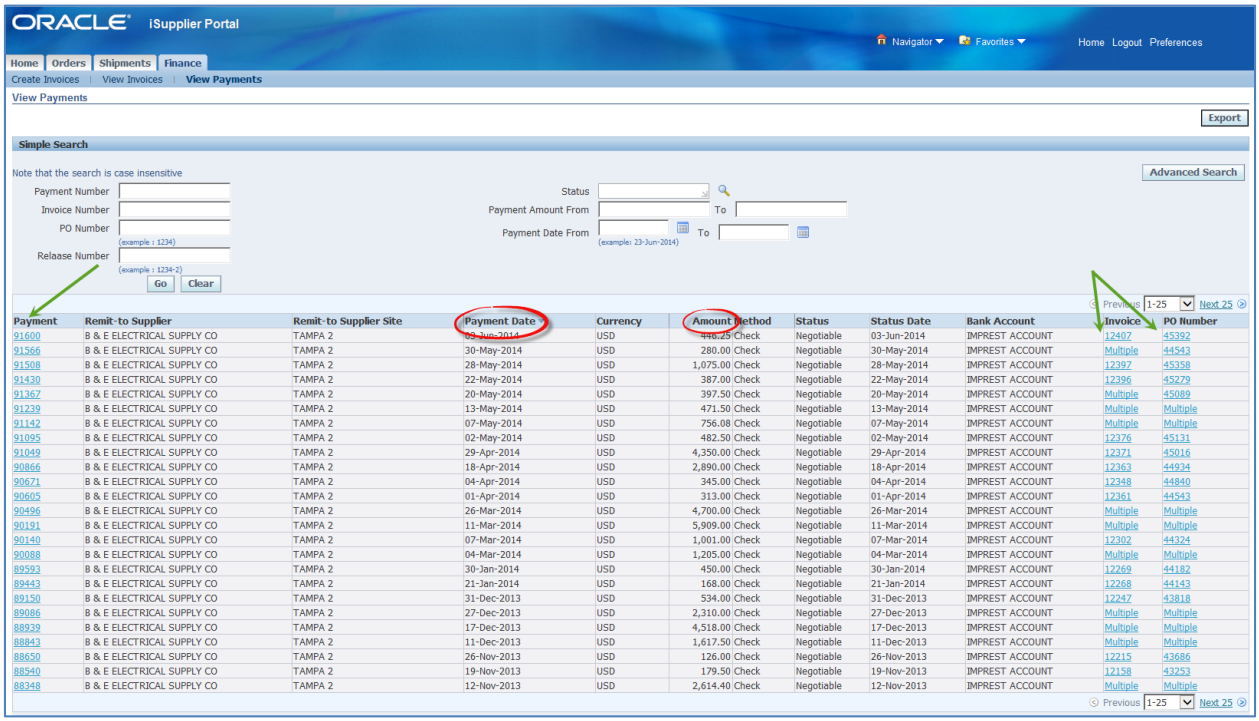
View Payments

To view the status of a payment, click on the View Invoices hyperlink under the Finance Tab. You can search by any of the fields listed or simply click Go to view a list of all payments.



You are able to view an individual Payment, the Invoice associated with that Payment and the PO Number created for the good(s) or services(s) associated with the Payment.

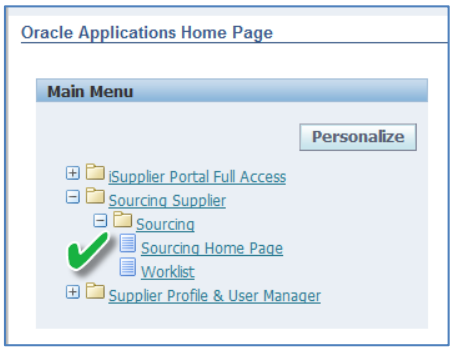
The Payment Date and Amount are provided via this page as well.



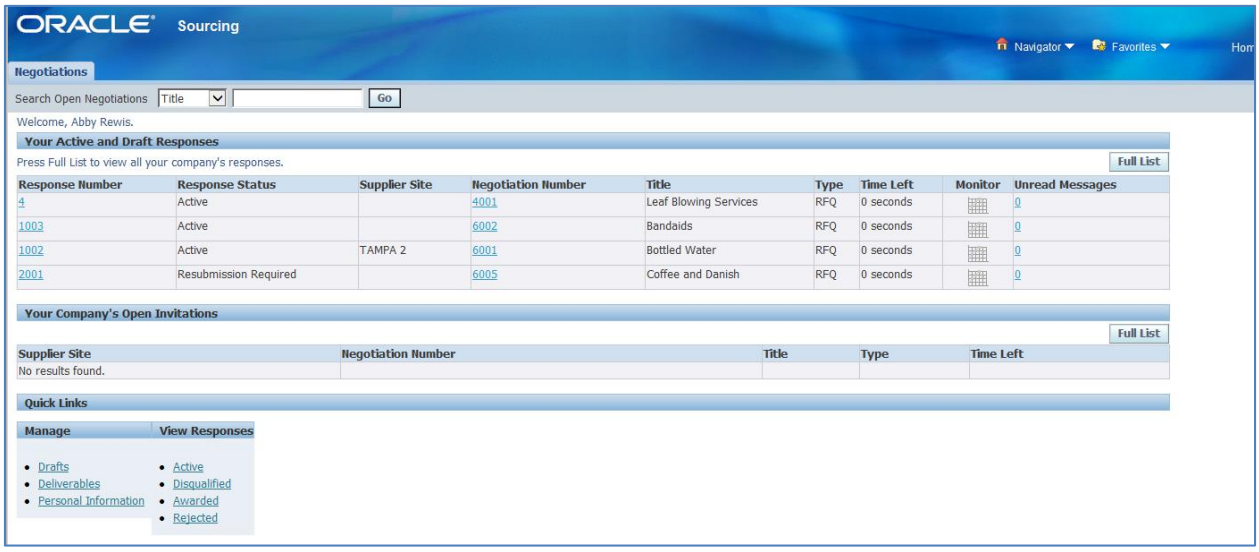
Sourcing Supplier

Sourcing Supplier is the electronic bidding module in Oracle. This responsibility allows you to respond to electronic Requests for Quotes (RFQ) or "Negotiations".

To access RFQs, click on "Sourcing Supplier" on the Oracle Applications Home Page, then on "Sourcing", finally on "Sourcing Home Page."

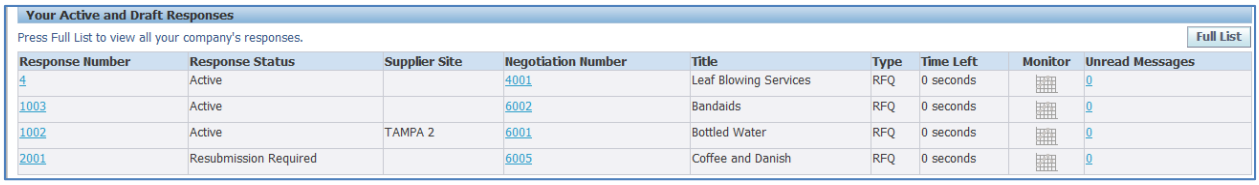


Here is what you will see:



Active and Draft Responses

A list of all of your Company's active Negotiation responses are provided:



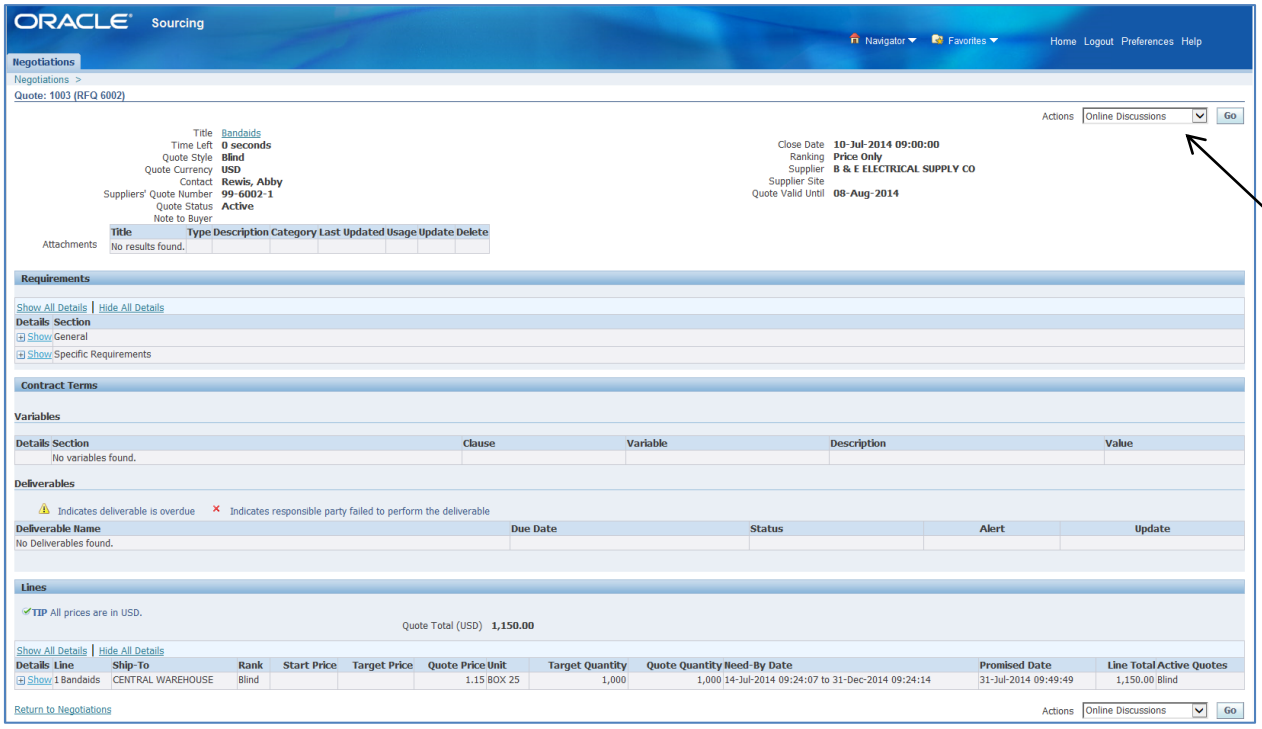
Your Active and Draft Responses

Press Full List to view all your company's responses. Full List

Response Number	Response Status	Supplier Site	Negotiation Number	Title	Type	Time Left	Monitor	Unread Messages
4	Active		4001	Leaf Blowing Services	RFQ	0 seconds		0
1003	Active		6002	Bandaids	RFQ	0 seconds		0
1002	Active	TAMPA 2	6001	Bottled Water	RFQ	0 seconds		0
2001	Resubmission Required		6005	Coffee and Danish	RFQ	0 seconds		0

Response Number

Clicking on the hyperlink under Response Number will take you to the Negotiation page. You are able to see your Company's entire response to the Negotiation here.



ORACLE Sourcing

Navigator Favorites Home Logout Preferences Help

Negotiations

Negotiations >

Quote: 1003 (RFQ 6002)

Actions Online Discussions Go

Title Bandaids
Time Left 0 seconds
Quote Style Blind
Quote Currency USD
Contact Rewis, Abby
Suppliers' Quote Number 99-6002-1
Quote Status Active
Note to Buyer

Close Date 10-Jul-2014 09:00:00
Ranking Price Only
Supplier B & E ELECTRICAL SUPPLY CO
Supplier Site
Quote Valid Until 08-Aug-2014

Attachments

Title	Type	Description	Category	Last Updated	Usage	Update	Delete
No results found.							

Requirements

Show All Details | Hide All Details

Details Section
Show General
Show Specific Requirements

Contract Terms

Variables

Details Section	Clause	Variable	Description	Value
No variables found.				

Deliverables

Indicates deliverable is overdue Indicates responsible party failed to perform the deliverable

Deliverable Name	Due Date	Status	Alert	Update
No Deliverables found.				

Lines

TIP All prices are in USD.

Quote Total (USD) 1,150.00

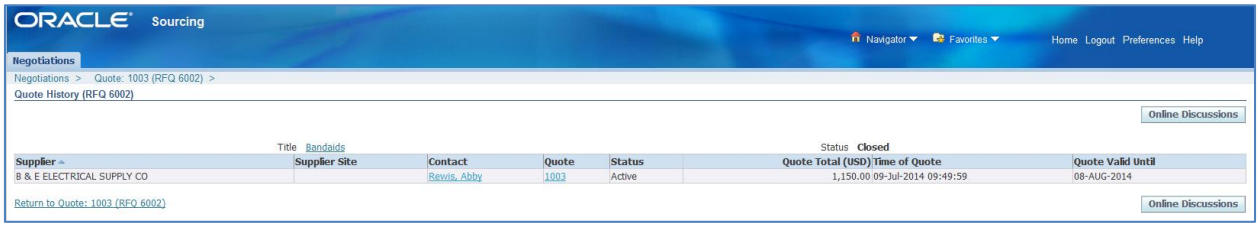
Show All Details | Hide All Details

Details Line	Ship-To	Rank	Start Price	Target Price	Quote Price	Unit	Target Quantity	Quote Quantity	Need-By Date	Promised Date	Line Total	Active Quotes
Show 1 Bandaids	CENTRAL WAREHOUSE	Blind			1.15	BOX 25	1,000	1,000	14-Jul-2014 09:24:07 to 31-Dec-2014 09:24:14	31-Jul-2014 09:49:49	1,150.00	Blind

Return to Negotiations

Actions Online Discussions Go

By changing the Actions List of Values on the Negotiations page to "View Quote History", you get a quick view of the information:



ORACLE Sourcing

Navigator Favorites Home Logout Preferences Help

Negotiations

Negotiations > Quote: 1003 (RFQ 6002) >

Quote History (RFQ 6002)

Online Discussions

Title Bandaids Status Closed

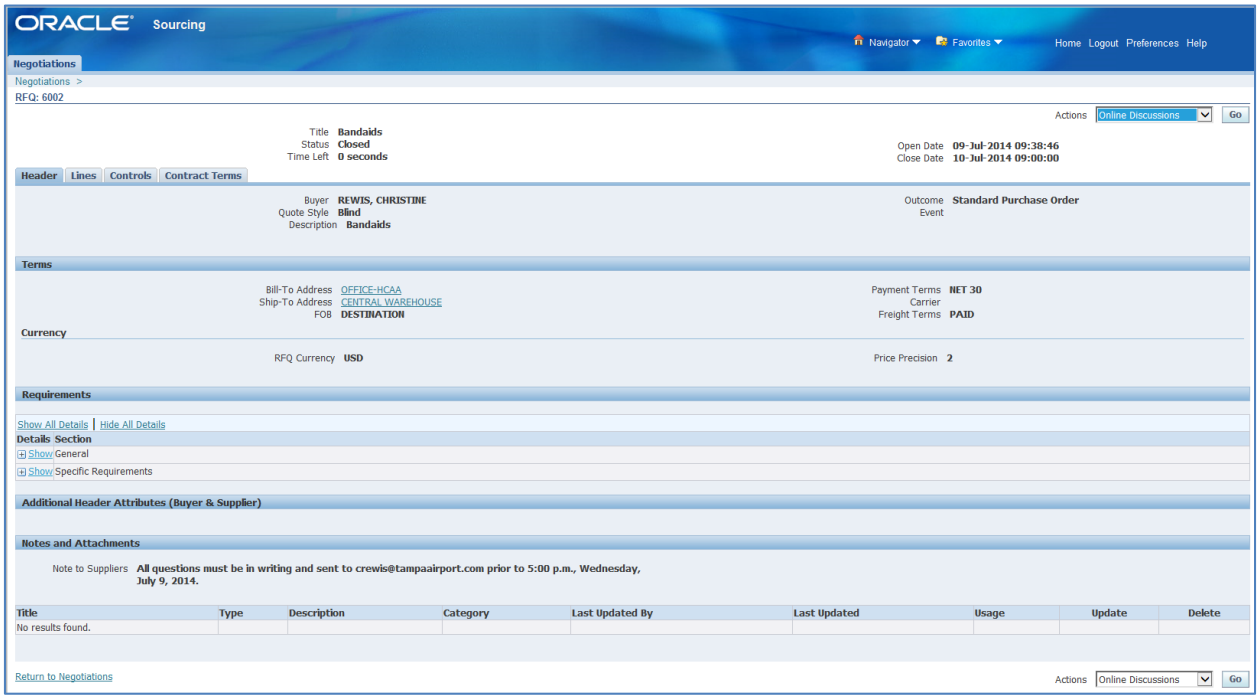
Supplier	Supplier Site	Contact	Quote	Status	Quote Total (USD)	Time of Quote	Quote Valid Until
B & E ELECTRICAL SUPPLY CO		Rewis, Abby	1003	Active	1,150.00	09-Jul-2014 09:49:59	08-AUG-2014

Return to Quote: 1003 (RFQ 6002)

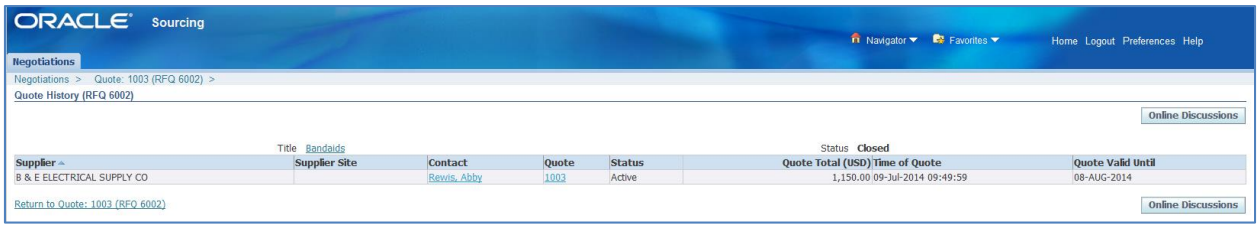
Online Discussions

Negotiation Number

Clicking on the hyperlink under Negotiation Number will allow you to view the RFQ in its entirety as issued by the Authority:

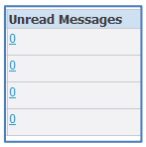


By changing the Actions List of Values to “View Quote History”, you get a quick view of the information:



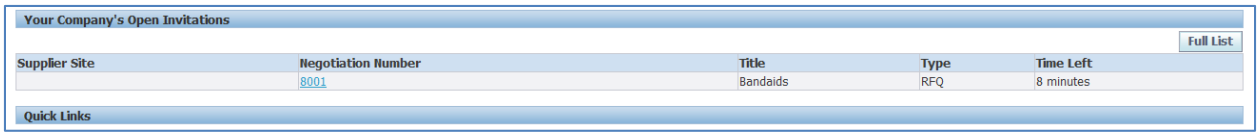
Unread Messages

All messages communicated through the Online Discussion action are available under Unread Messages.

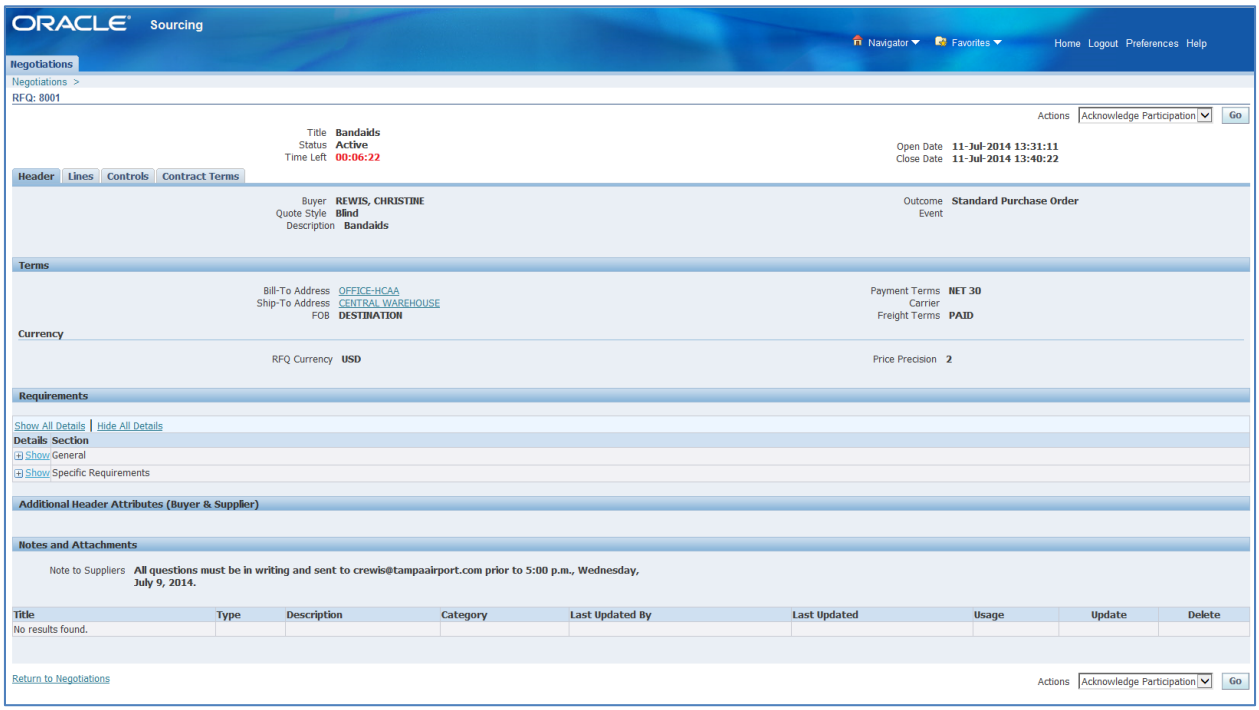


Your Company's Open Invitations

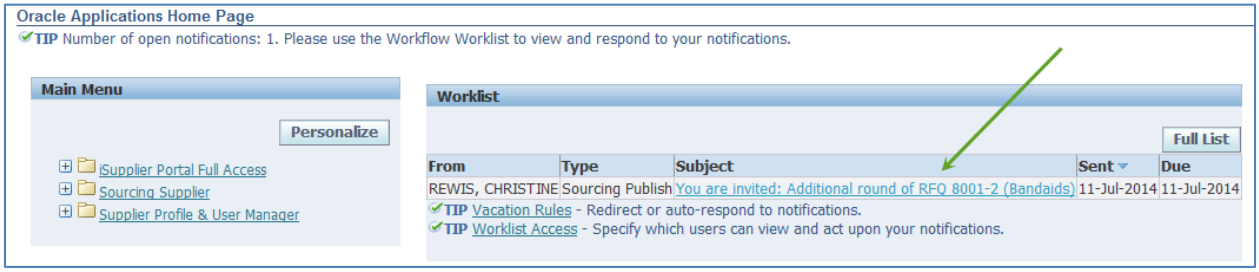
This section shows those Negotiations that your Company has received an invitation to:



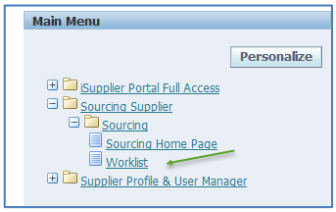
To respond to the invitation, click on the hyperlink under Negotiation Number. This opens the Negotiation (RFQ).



The invitation appears on your Oracle Applications Home Page:

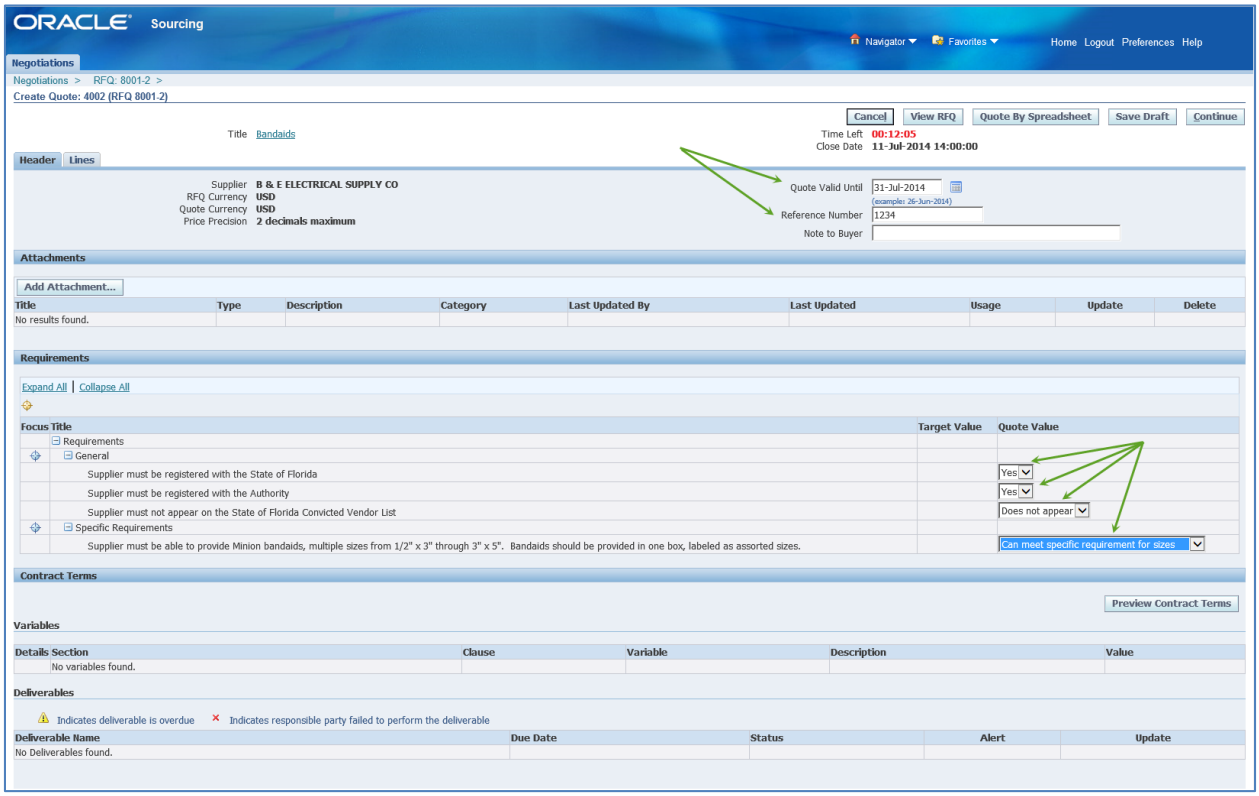


You can also access it via your Worklist:



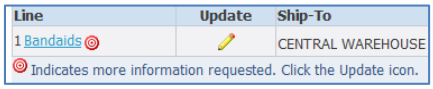
Step	Action
1.	In the **Actions List of Values**, make sure it says **Acknowledge Participation**. Click **Go.** Actions Acknowledge Participation Go
2.	If you are going to respond, check the **Yes** radio button; if not, click the **No** radio button and provide a **Note to Buyer.** Click **Apply.**
3.	Change the **Action List of Values** to **Create Quote.** Click **Go**. Actions Create Quote Go
4.	Fill in the information requested.

Header Page

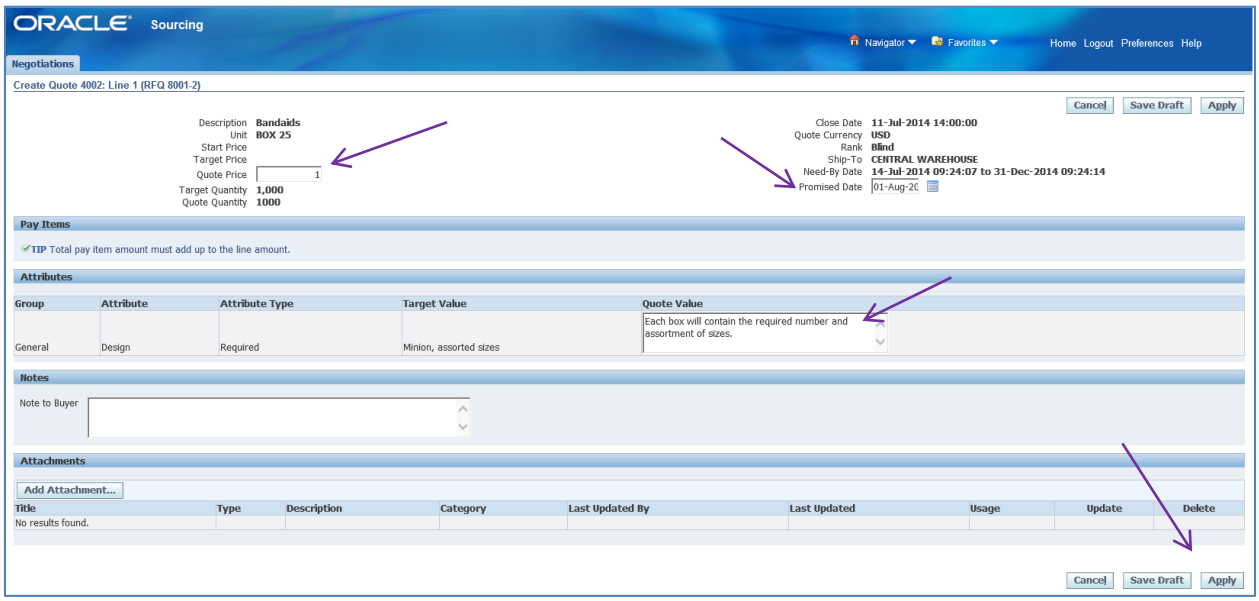


Lines Page

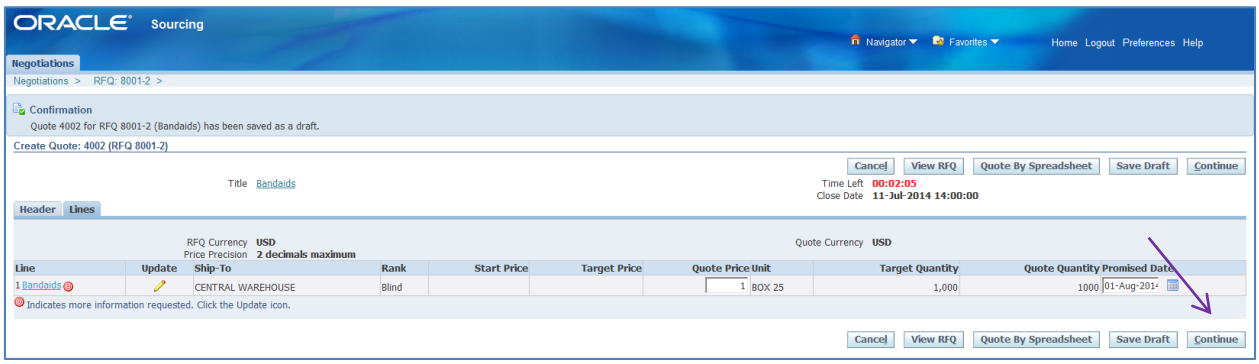
There are questions that need to be answered on the Lines Page. You can see this by the red dot next to the Line and the pencil icon under Update. Click on the pencil to update the information.



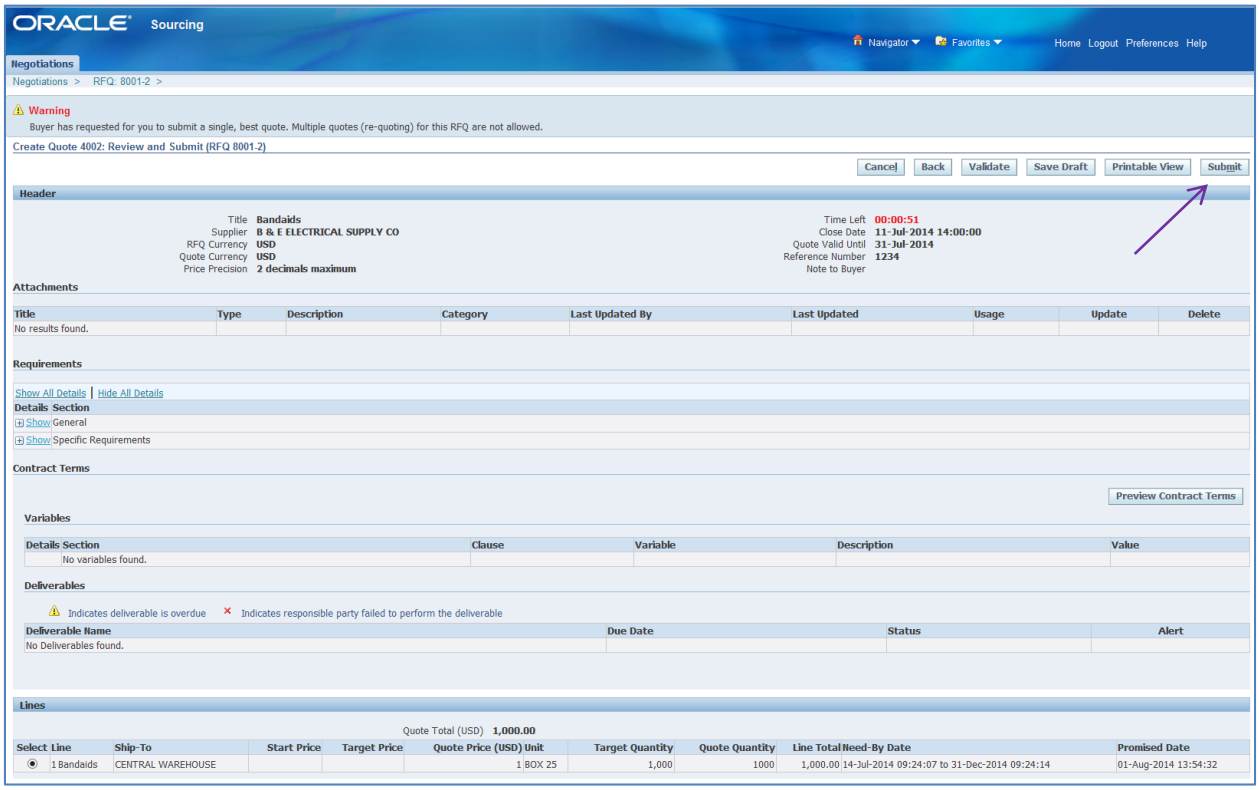
Fill in the information in Quote Value. You are able to fill in the Quote Price and Promised Date on this page as well. Then click Apply.



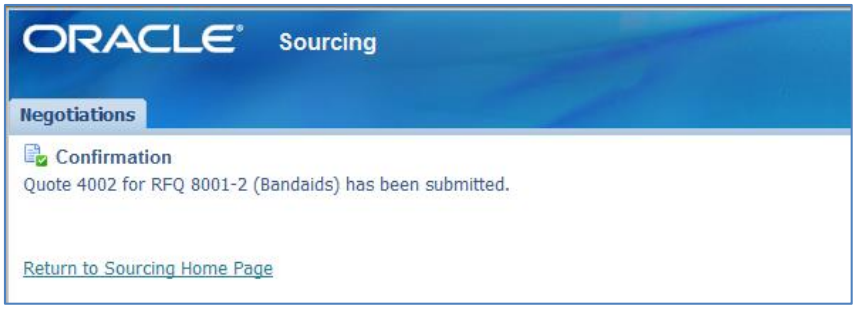
Save your quote then click Continue.



You can now submit your quote.

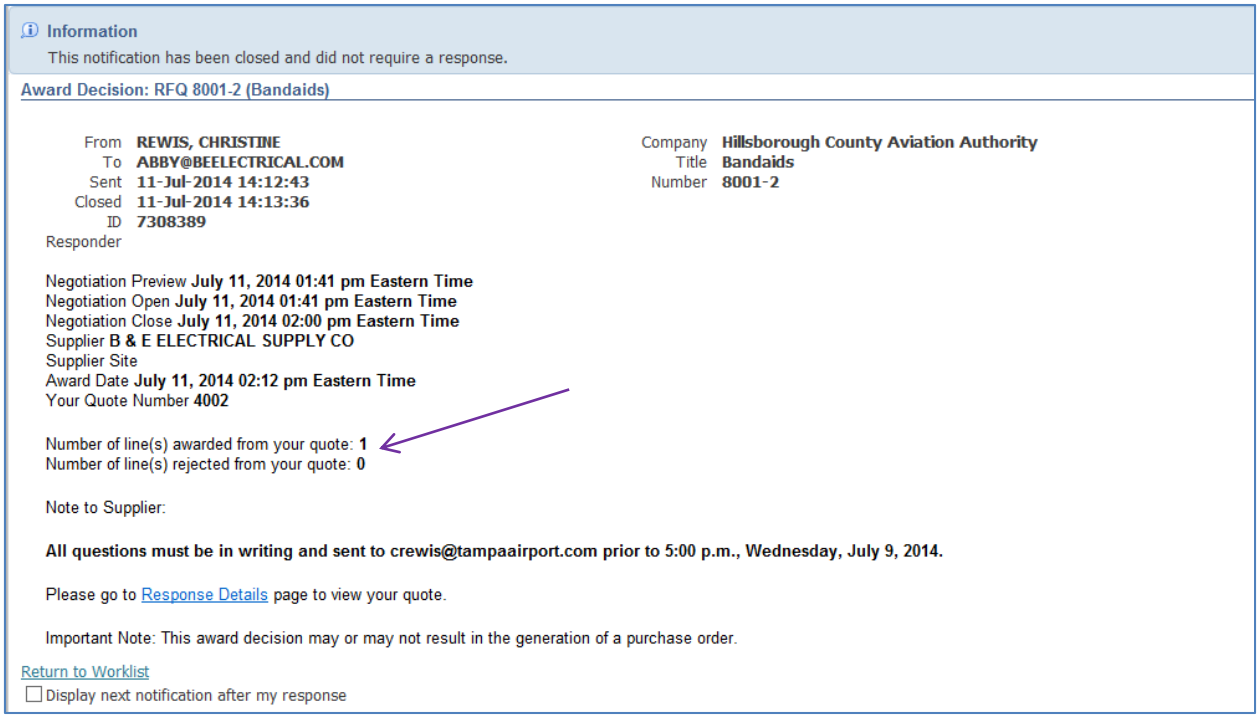


The System will confirm that your quote has been submitted:



For specific information, you can click on any of the hyperlinks under the Quick Links.

Once the Negotiation has closed, the Authority will review all quotes received and issue award. You will receive email notification regarding the award once it is complete. A notification also appears in your Worklist.


Information

This notification has been closed and did not require a response.

Award Decision: RFQ 8001-2 (Bandaids)

From **REWIS, CHRISTINE**
To **ABBY@BEELECTRICAL.COM**
Sent **11-Jul-2014 14:12:43**
Closed **11-Jul-2014 14:13:36**
ID **7308389**
Responder

Company **Hillsborough County Aviation Authority**
Title **Bandaids**
Number **8001-2**

Negotiation Preview **July 11, 2014 01:41 pm Eastern Time**
Negotiation Open **July 11, 2014 01:41 pm Eastern Time**
Negotiation Close **July 11, 2014 02:00 pm Eastern Time**
Supplier **B & E ELECTRICAL SUPPLY CO**
Supplier Site
Award Date **July 11, 2014 02:12 pm Eastern Time**
Your Quote Number **4002**

Number of line(s) awarded from your quote: **1**
Number of line(s) rejected from your quote: **0**

Note to Supplier:

All questions must be in writing and sent to crewis@tampaairport.com prior to 5:00 p.m., Wednesday, July 9, 2014.

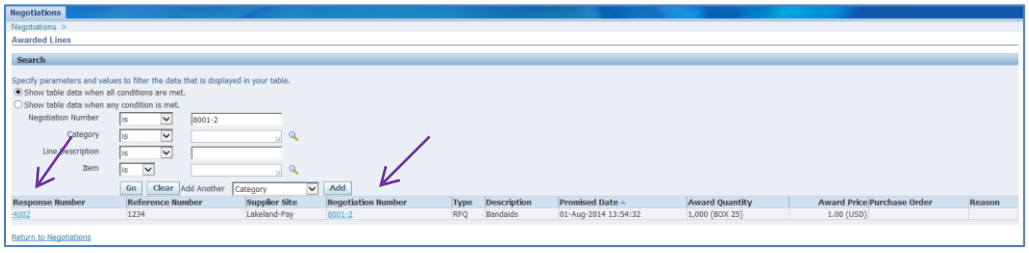
Please go to Response Details page to view your quote.

Important Note: This award decision may or may not result in the generation of a purchase order.

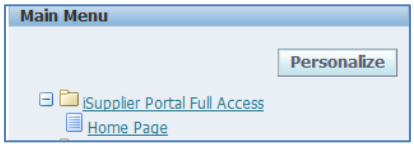
Return to Worklist
Display next notification after my response

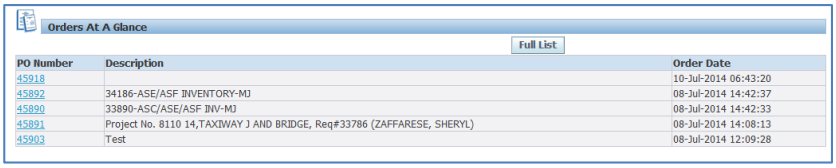
This notification shows that the quote was awarded to your Company. You can view the quote information by clicking on the Awarded hyperlink under View Responses.

The Awarded Lines page allows you to click on the Response Number or Negotiation Number hyperlink to view the quote history, as shown on pages 56 and 57.



A Purchase Order will be issued at the conclusion of the Negotiation. A copy will be available in iSupplier Portal Full Access under Orders at a Glance.

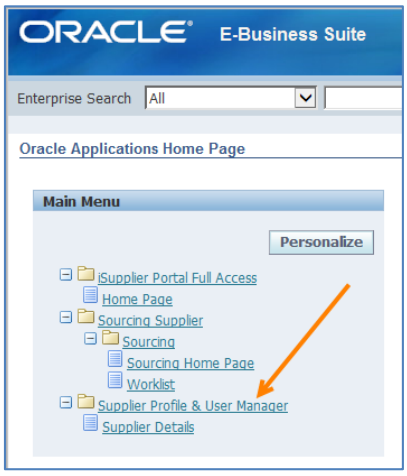




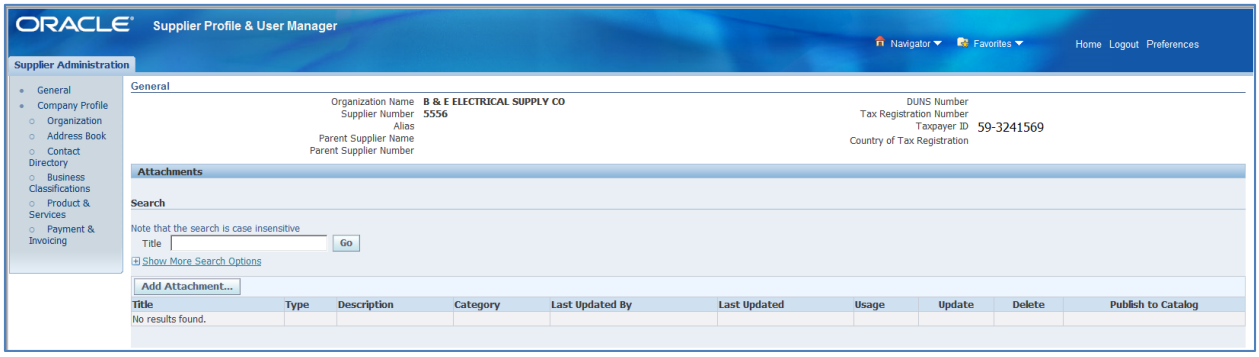
Supplier Profile & User Manager

The Supplier Profile & User Manager is the administrative arm of the Supplier Portal. Only Administrators have access to this as it enables the Administrative to make changes to the Supplier Profile. You should identify one Administrator and one back-up.

Click on Supplier Profile & User Manager then Supplier Details to access this section.



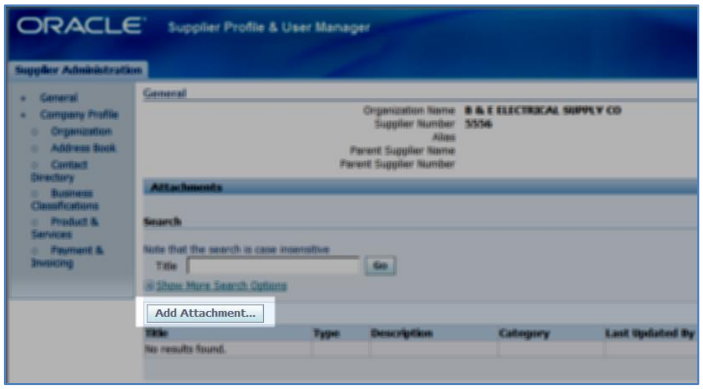
This is what the Supplier Administration page looks like:



General

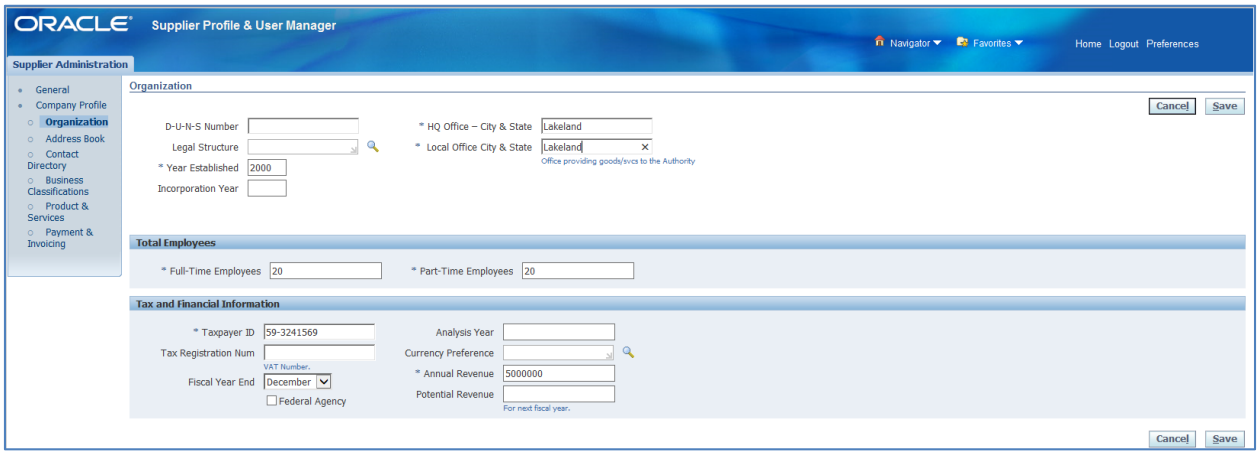
The General section provides basic Company information. This is the best place to add attachments that pertain to your Company such as minority certificates or licenses.

To add an attachment, click on the Add Attachment button.



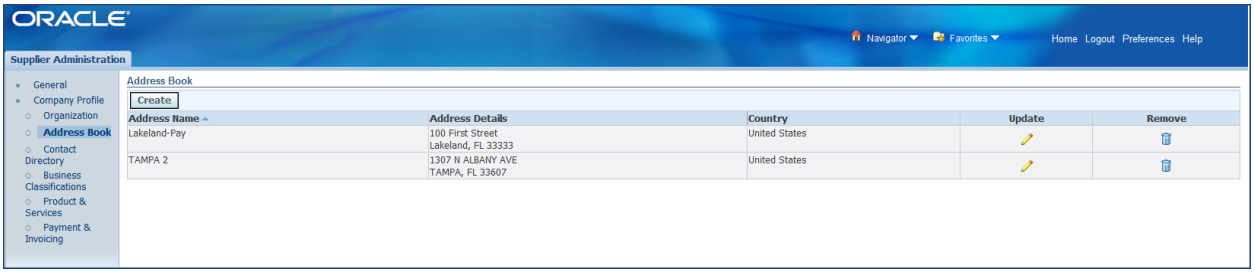
Organization

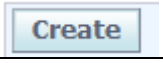
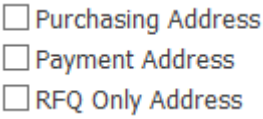
The Organization page provides additional general information about your Company. The fields marked with an asterisk (*) are required fields.



Address Book

The Address Book lists the various addresses for your Company.

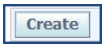
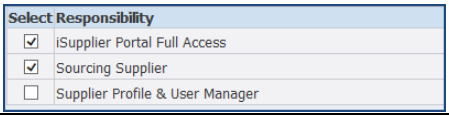
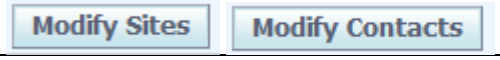


Step	Action
1.	To set up a new address, click the **Create** button. 
2.	The Address Name should be the City of the address. To make a specific identification of the address, add a hyphen and the descriptive word (i.e. –Payment) to the end of the address name. All fields with an asterisk (*) are required. Click **Apply.**
3.	Select the option(s) that apply to this address: **Purchasing Address, Payment Address, RFQ Only Address.** 
4.	When all information is completed, click **Save.**

Contact Directory

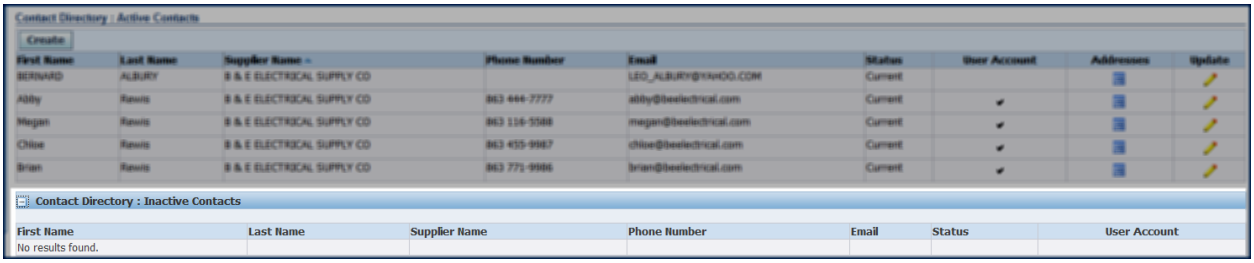
The Contact Directory lists Company employees with access to the Portal.

This section provides a list of your employee(s) that have access to the Supplier Portal. The employee may just be listed as a contact, with no responsibilities, or may be a contact that has any or all of the three responsibilities (iSupplier Full Access, Sourcing, Supplier User & Profile Manager). To view the responsibilities granted to an individual user simply click on the pencil icon below Update.

Step	Action
1.	To set up a new contact, click the **Create** button. 
2.	Fill in the relevant information. Check the box next to the **Create User Account for this Contact.** The checkbox next to **Certification Reminders** should be checked. All fields with an asterisk (*) are required. Click **Apply.**
3.	Check the box next to each **Responsibility** the user is being provided access to. REMEMBER: do not click the box next to **Supplier Profile & User Manager** if the user is not an Administrator. We recommend only **2** users be provided this responsibility. 
4.	If there are Supplier or contact restrictions, you are able to note these by clicking on the appropriate **Modify** button. You will need to modify a site first, log out of the System then log back in to be able to modify the contact(s) associated with that site. 
5.	Once you have provided all necessary information, click **Apply.**

The new contact will receive a System generated email with their user name and temporary password. The first time they log into the System, they will be required to change their password.

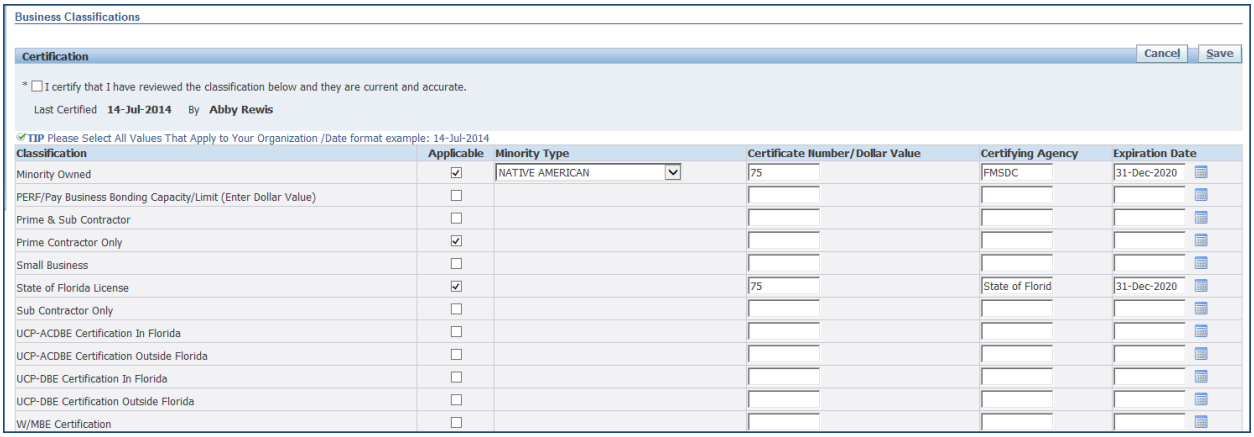
If you inactivate any of your contacts, they will be listed under Contact Directory: Inactive Contacts.



Business Classifications

The Business Classifications section provides the Authority with important information concerning licensure, bonding capabilities, minority status and whether you are a prime Supplier, a sub or both. This information aids us in meeting our diversity requirements as well as being able to continue to assist the minority community in business opportunities with the Authority.

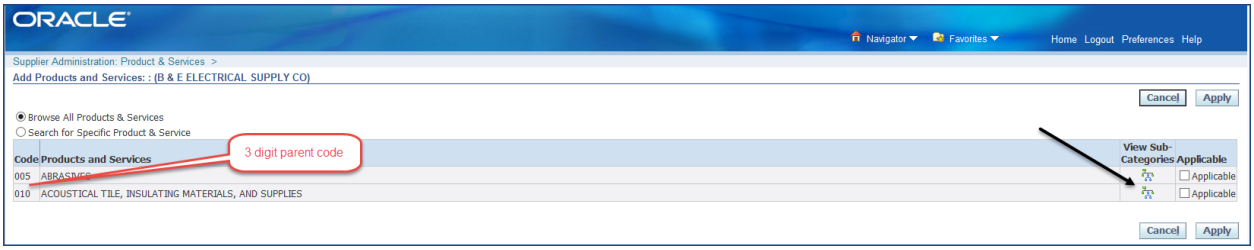
Generally, this information will be completed during the initial set up of your Profile. However, updates to all relevant certifications are to be made here once the certification has been renewed. Copies of the certificates can be scanned and uploaded to the General page.



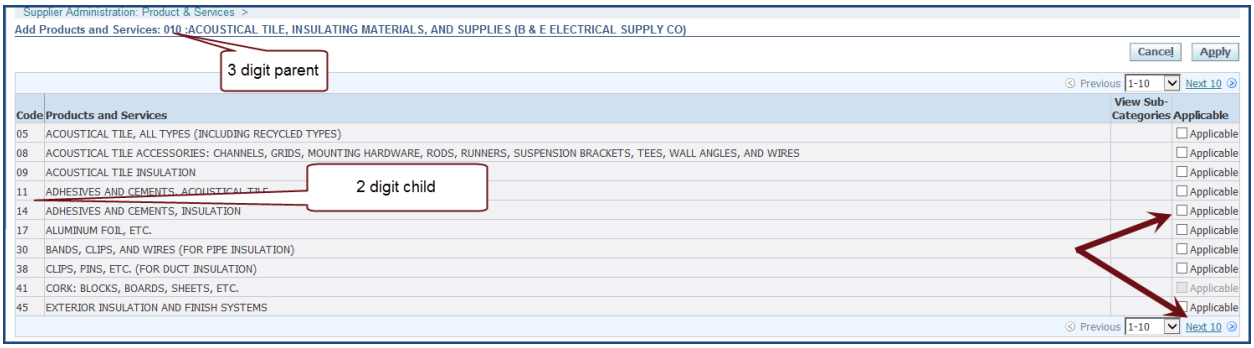
Products and Services

The Products and Services section provides specific codes that indicate the good(s) and/or service(s) that you will be providing to the Authority.

Products and Services codes are based upon the NIGP Living Code (for additional information, visit www.nigp.com). The code numbers have a three digit "parent" code which identifies the group. The two digit "child" code, which is found after the hyphen, actually identifies a particular good or service. The Authority asks that you do NOT select a three digit parent code; always click on the icon under "View Sub-Categories" to pull up the list of two digit child codes.

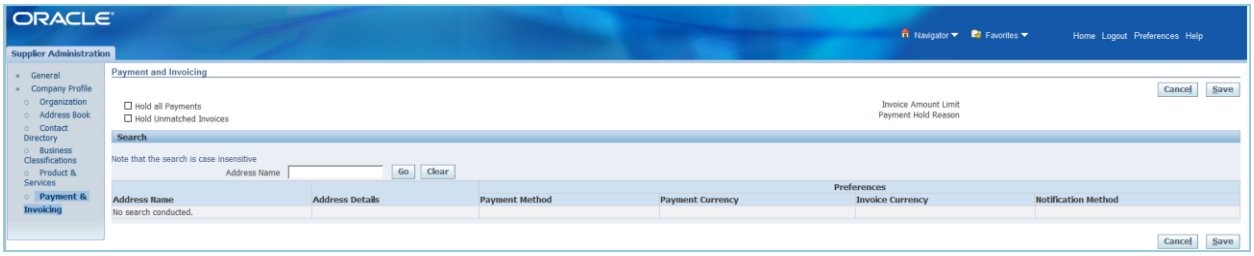


Step	Action
1.	To search the list of codes by browsing, click the radio button next to **Browse All Products & Services**. ◉ Browse All Products & Services Click on the icon.
2.	Select the appropriate "child" code(s) by checking the box next to **Applicable.** If you need to continue searching this "parent" code, click **Next 10**. Once all codes are selected, click **Apply.**

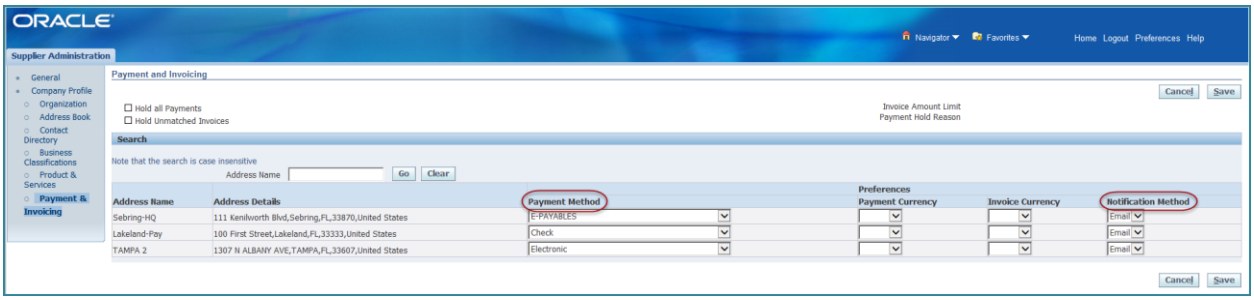


Payment and Invoicing

The Payment and Invoicing section will allow you to select payment method(s) by address (site). It also allows you to set up the method of notification when a payment has been made.



Step	Action
1.	To get a list of your Company addresses, click **Go**.
2.	For each address, click on the **Payment Method** list of values then click on the **Notification Method** to choose how you would like to be contacted when payment is made. Once all selections are made, click **Save.**



Conclusion

Congratulations! You have successfully navigated through the Authority's Supplier Portal and now have the knowledge necessary to interact with us in real-time. As you become more proficient in the System, you will find it much easier to answer those daily questions:

- "Has a purchase order been issued?"
- "What is the status of this invoice?"
- "Are all the deliverables for this purchase order completed?"
- "When was this invoice paid?"

We encourage you to explore the information you now have access to; please don't hesitate to contact us if you ever need assistance. procurementhelpline@tampaairport.com or (813) 870-8796.

Bon Voyage!