Enterprise Resource Planning Solution Contractor Orientation

zeus
oracle cloud

During the Presentation, phones will be muted. To ask a question, please type it in the Chat Box. If you cannot use the Chat function, email your questions to: cecp@dcwater.com.

After the Training, for Help or Questions concerning the Vendor Portal, contact DC Water's Procurement Department.

Contact Telephone: 202/ 787- 2020
Contact Email: ProcurementInquiry@dcwater.com

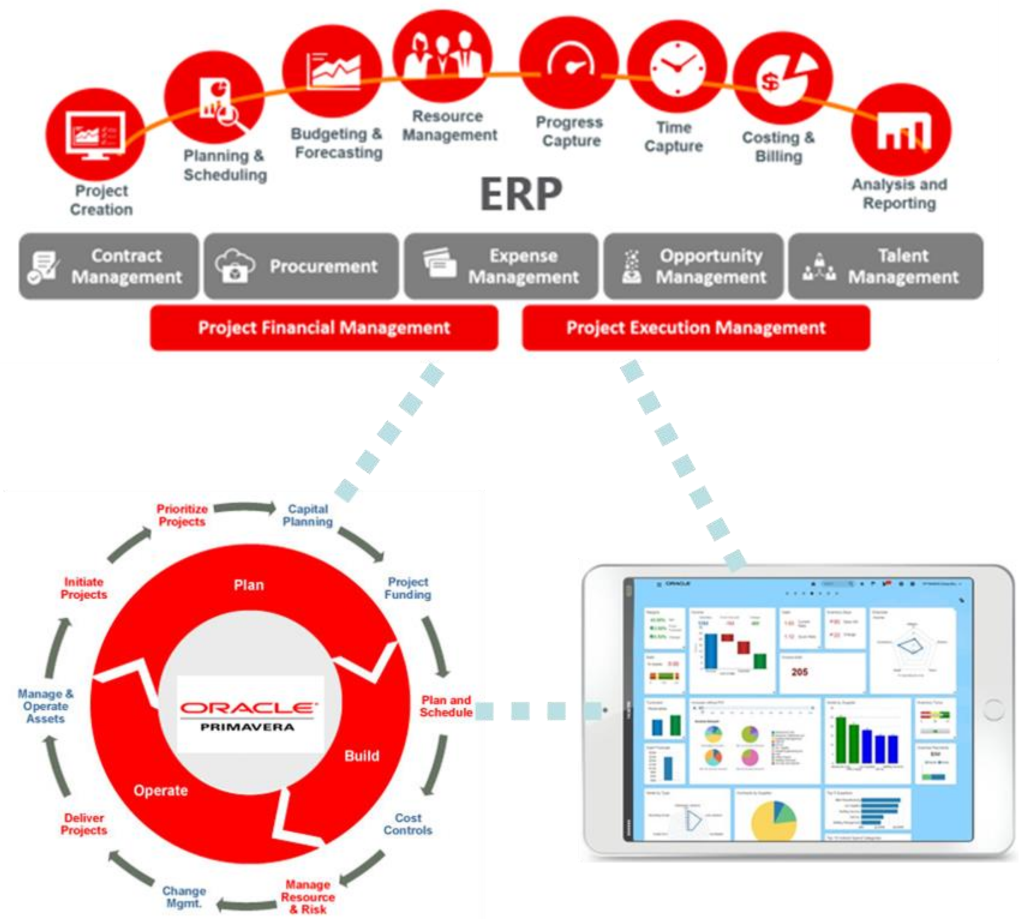
AGENDA

- DC Water ERP Overview
- Part 1: Vendor Registration
- Part 2: Manage Profiles
  - Profile Addresses
  - Products and Services
- Part 3: Viewing and Responding To Solicitations
- Part 4: Submitting and Viewing Purchase Orders
  - Acknowledging Purchase Orders
- Part 5: Submitting and Viewing Invoices

DC Water ERP Overview

water is life

New ERP System: Oracle



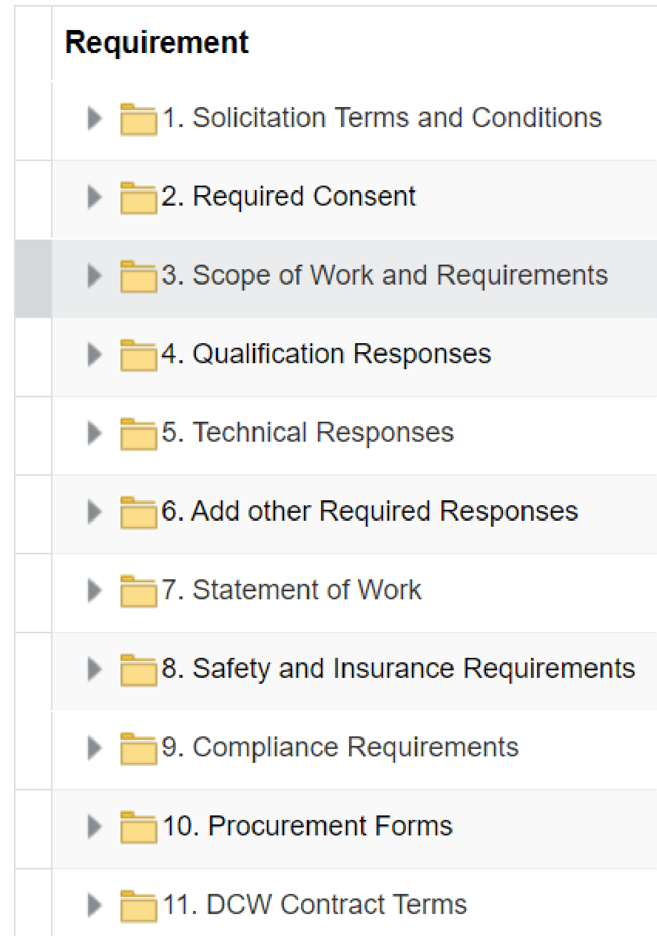
- **Integrated system:**
  - Financial, HCM, and Procurement on a single enterprise-wide system.
  - Seamless way of working, increasing productivity, efficiency, improved quality and reduced lead-time.
- **Built-in industry best practice**
- **Automated dashboard and reporting**
- **Automated workflow**
- **Increased transparency, auditability & compliance**
- **Mobility:**
  - **iOS and Android compatible**

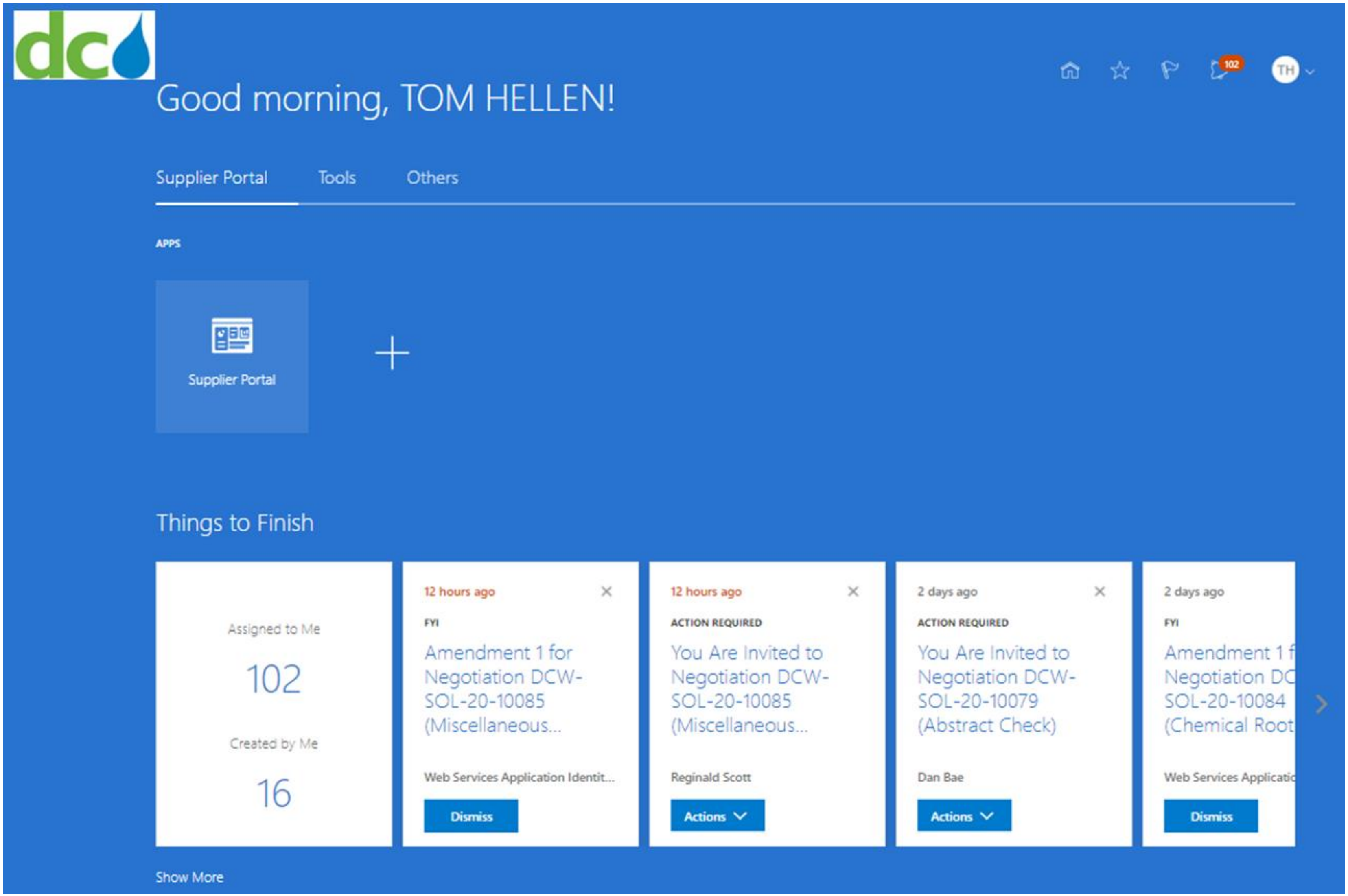
New ERP System: Oracle

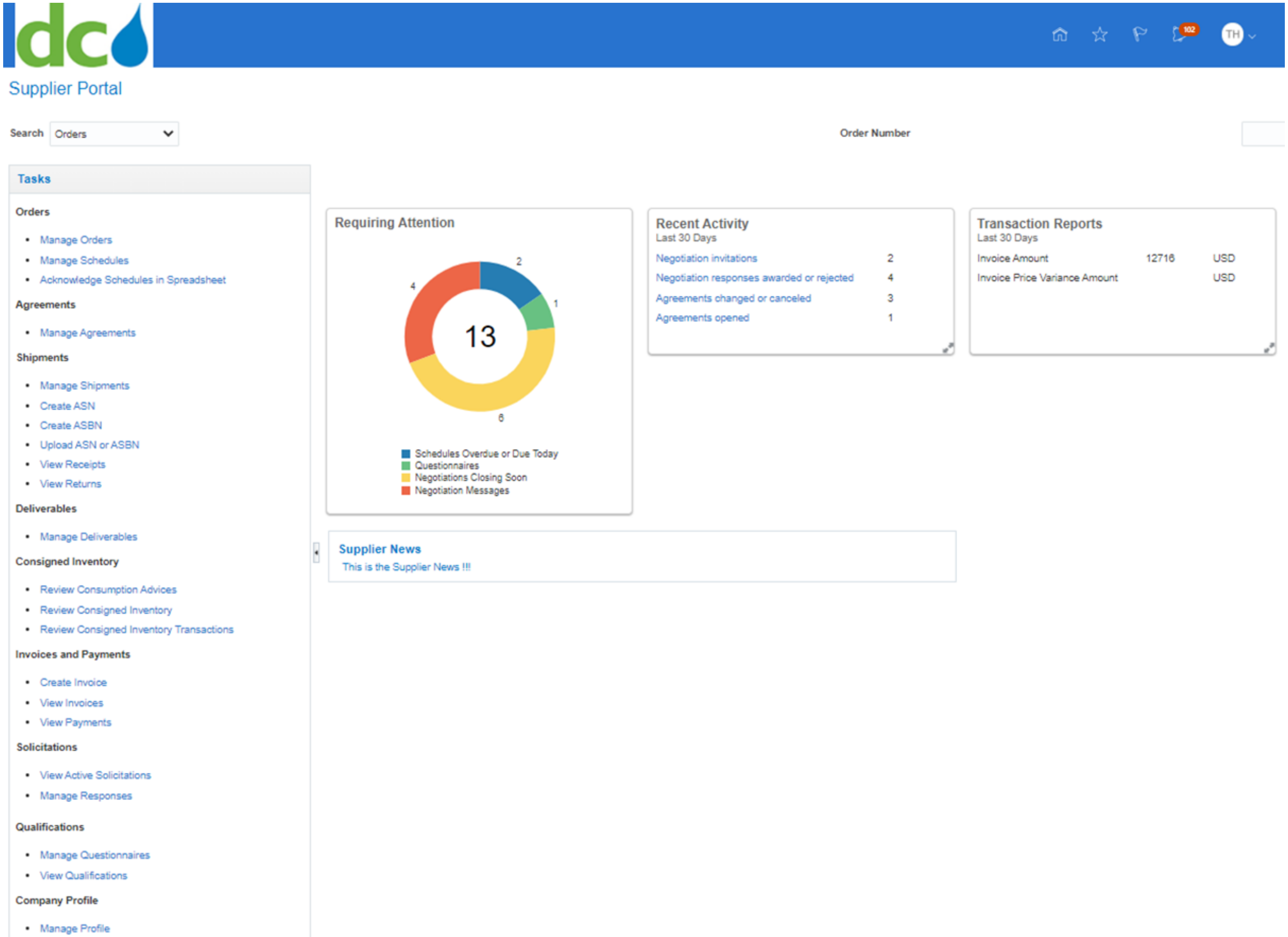
water is life

Key Benefits for Suppliers

- **Automatic invitation to new solicitation (for registered products and services)**
- **News, Events, Reminders**
- **Current solicitation dashboard**
- **Online Solicitation and Proposal System (paperless)**
- **View all activities in Dashboard, including POs and payment status**




Good morning, TOM HELLEN!
Supplier Portal
Tools
Others
APPS
Supplier Portal
Things to Finish
Assigned to Me
102
Created by Me
16
12 hours ago
FYI
Amendment 1 for Negotiation DCW-SOL-20-10085 (Miscellaneous...
Web Services Application Identit...
Dismiss
12 hours ago
ACTION REQUIRED
You Are Invited to Negotiation DCW-SOL-20-10085 (Miscellaneous...
Reginald Scott
Actions
2 days ago
ACTION REQUIRED
You Are Invited to Negotiation DCW-SOL-20-10079 (Abstract Check)
Dan Bae
Actions
2 days ago
FYI
Amendment 1 f
Negotiation DC
SOL-20-10084
(Chemical Root
Web Services Applicatio
Dismiss
Show More


Supplier Portal
Search
Orders
Order Number
Tasks
Orders
Manage Orders
Manage Schedules
Acknowledge Schedules in Spreadsheet
Agreements
Manage Agreements
Shipments
Manage Shipments
Create ASN
Create ASBN
Upload ASN or ASBN
View Receipts
View Returns
Deliverables
Manage Deliverables
Consigned Inventory
Review Consumption Advices
Review Consigned Inventory
Review Consigned Inventory Transactions
Invoices and Payments
Create Invoice
View Invoices
View Payments
Solicitations
View Active Solicitations
Manage Responses
Qualifications
Manage Questionnaires
View Qualifications
Company Profile
Manage Profile
Requiring Attention
13
2
1
6
4
Schedules Overdue or Due Today
Questionnaires
Negotiations Closing Soon
Negotiation Messages
Recent Activity
Last 30 Days
Negotiation invitations 2
Negotiation responses awarded or rejected 4
Agreements changed or canceled 3
Agreements opened 1
Transaction Reports
Last 30 Days
Invoice Amount 12716 USD
Invoice Price Variance Amount USD
Supplier News
This is the Supplier News !!!

Helpful Hints and Tools

When stopping in the middle of registration process, click “Save for Later”, not Cancel (will not save information entered)

Part 1: Vendor Registration

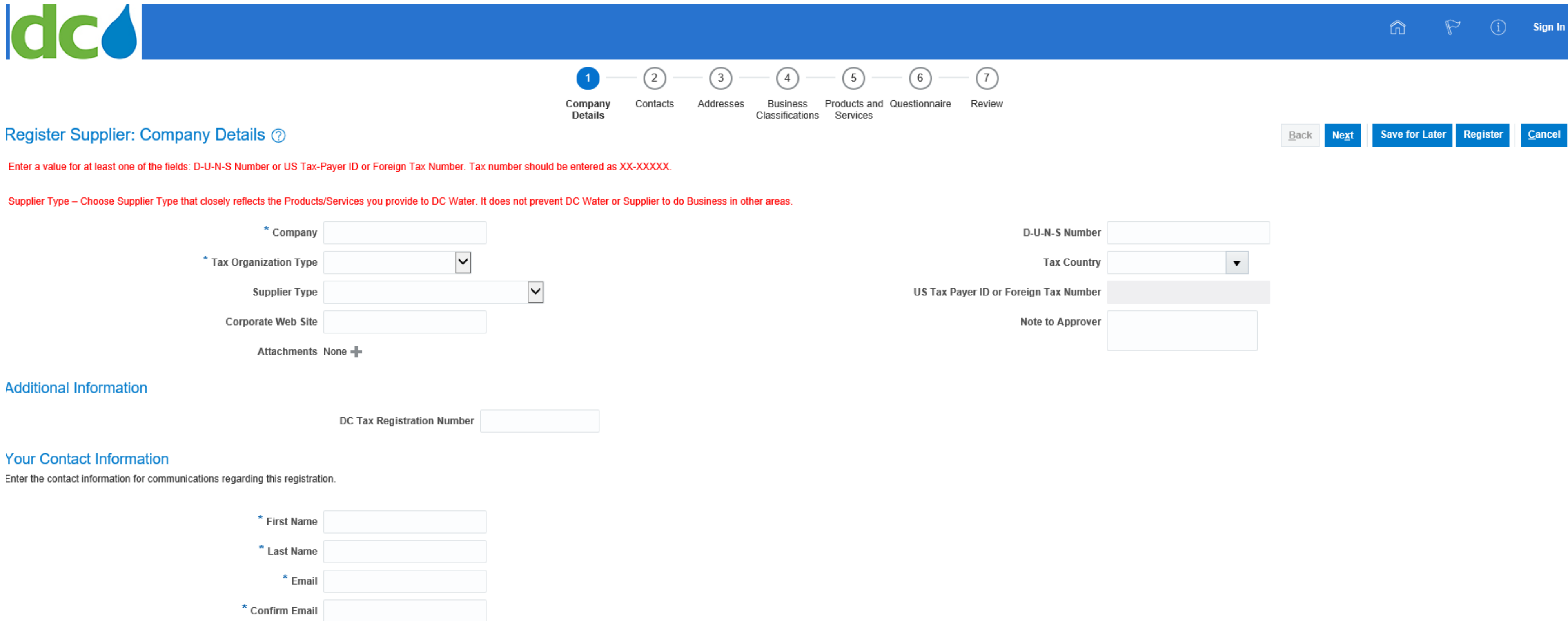
Part 1: Vendor Registration - Scenario

Company Profile

Firm Name:	XYZ Corporation	**Address:**	555 Anywhere St
Tax Organization:	Corporation	**City:**	Oxon Hill
Supplier Type:	Construction Service	**State:**	MD
Website:	www.xyz.com	**Zip:**	20745
Duns Number:	555555555	**Address Purpose:**	Ordering/Remit To/RFQ or Building
Tax Country:	United States of America	**Firm Phone:**	202-555-5555
Tax ID:	26-4563123	**Firm Email:**	procurements@xyzcorp.com
DC Tax Registration:	N/A	**Certification:**	DBE
First Name:	George	**Certified By:**	MDOT
Last Name	Washington	**Cert Date:**	1/1/2020
Email:	jamal.jones@dcwater.com	**Review Date:**	12/31/2022
Tel:	202-555-5555	**Products/Services:**	Chemical

Step 1: Go to DC Water's Procurement Web Site

a) Open your **Internet Browser**. CHROME is the preferred web browser for the DC Water application.
b) Go to the **DC Water** website: **https://www.dcwater.com**.
c) Click on **Work with Us** on the menu options then click the **Procurement** link followed by the **DC Water Supplier Registration link**. The page also includes a link for DC Water Supplier Portal log-in and DC Water Solicitation Abstracts (Solicitation Listing).
d) Click **DC Water Supplier Registration link** to register as a new supplier.



Step 1: Go to DC Water's Procurement Web Site

1) When you click register, you will be taken to the screen above (Company Details).
There are seven (7) sections related to vendor registration:

Section 1 – Company Details
Section 2 – Contacts
Section 3 – Addresses
Section 4 – Business Qualifications
Section 5 – Products and Services
Section 6 - Questionnaire
Section7 - Review

Register Supplier: Company Details

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

Step 2

* Company

Step 3

* Tax Organization Type

Supplier Type

Corporate Web Site

Attachments None

- Corporation
- Foreign Corporation
- Foreign Individual
- Foreign Partnership
- Government Agency
- Individual
- Partnership

Step 2: Enter Company Information

2) Click in the Space Next to "Company" and Type in the Firm's name.
3) Use the Drop Arrow in the "Tax Organization Type" field to select the appropriate corporate structure of your firm.

Register Supplier: Company Details

Enter a value for at least one of these fields: D-U-N-S Number, Taxpayer ID, or Tax Registration Number.

- Automotive Service and Parts
- Construction Service
- Construction Materials and Supplies
- Distribution and Logistics Service
- Educational Institute
- Education or Training Service
- Engineering Service
- Equipment Manufacturers & Suppliers
- …

* Company

* Tax Organization Type

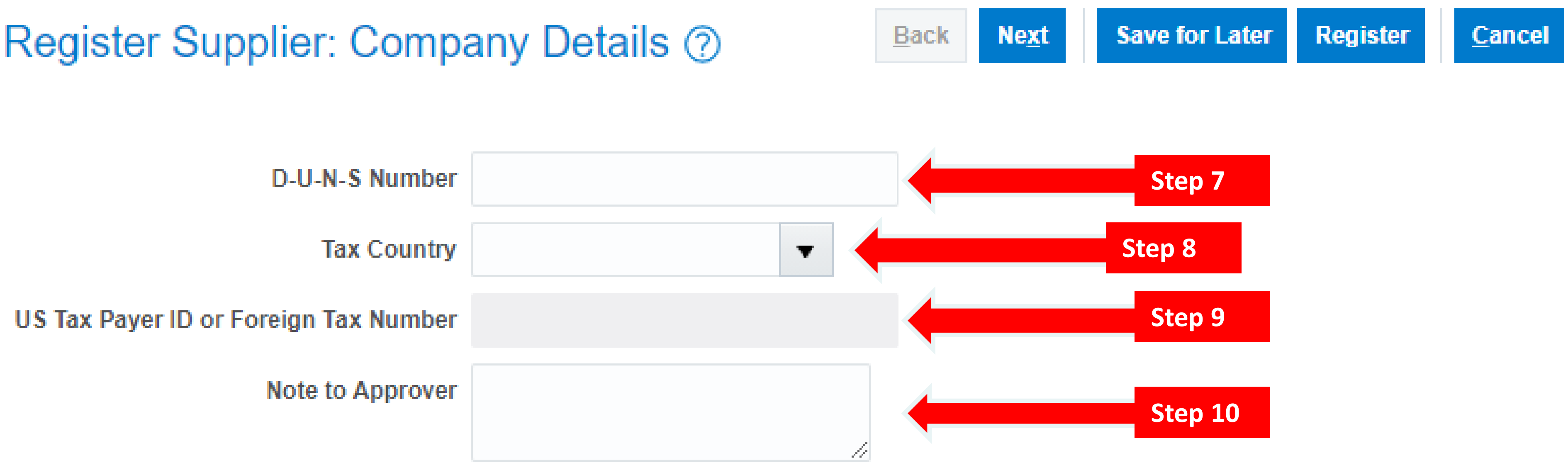
Supplier Type — Step 4

Step 5 — Corporate Web Site

Attachments None + — Step 6

Step 2: Enter Company Information

4) Use the Drop Arrow in the "Supplier Type" field to select the firm's core business function.
5) (Optional) Click in the Space Next to "Corporate Web Site" and Type in the Firm's website.
6) (Optional) Click the "+" sign next to "Attachments" to upload a copy of the firm's Capability Statement or Profile.



Step 2: Enter Company Information

7) Click in the Space Next to “D-U-N-S Number” and Type in the Firm’s DUNS number (9 or 15 digits)
8) Use the Drop Arrow in the “Tax Country” field to select the country where your firm is principally located.
9) Click in the Space Next to “US Tax Payer ID” and Type in the firms tax identification number (9 digits)
10) (Optional) Click in the Space Next to “Note to Approver” and Type any message you would like DC Water to consider relative to your firm’s tax structure.

Additional Information

Step 11

DC Tax Registration Number

Step 2: Enter Company Information

11) If your firm is a District of Columbia based business, Click in the Space Next to "DC Tax Registration Number" and Type in the Firm's DC Tax Identification (9 digits). If your firm is not a District of Columbia based business, leave this field blank.

Your Contact Information

Enter the contact information for communications regarding this registration.

Step 12 → * First Name

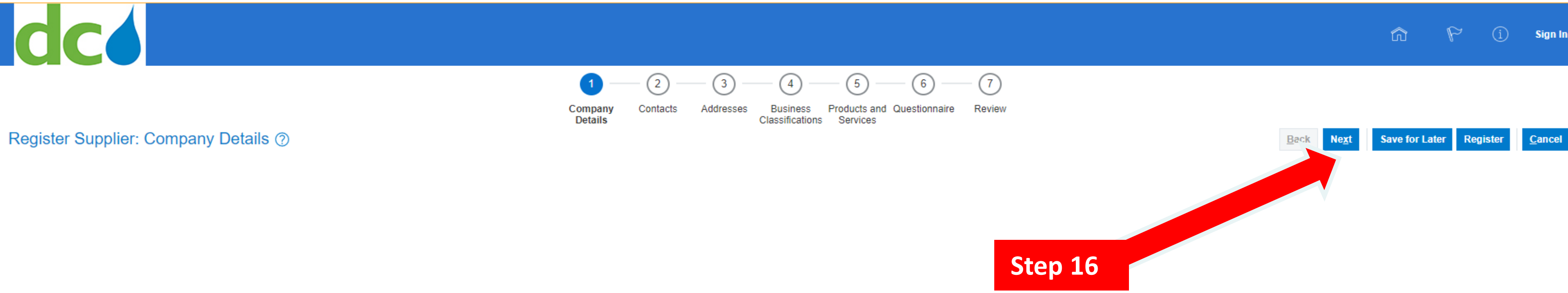
Step 13 → * Last Name

Step 14 → * Email

Step 15 → * Confirm Email

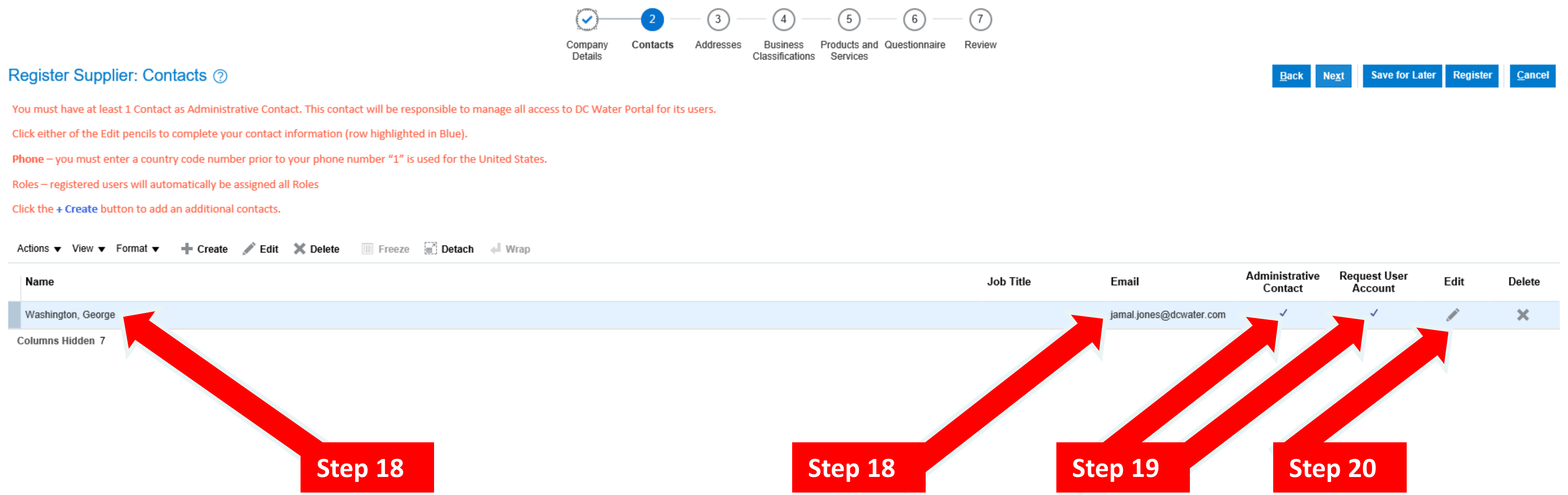
Step 2: Enter Contact Information

12) Click in the Space Next to “First Name” and Type the First Name of the Firm’s Primary Point of Contact.
13) Click in the Space Next to “Last Name” and Type the Last Name of the Firm’s Primary Point of Contact.
14) Click in the Space Next to “Email” and Type in the email address of the Firm’s Primary Point of Contact.
15) Click in the Space Next to “Confirm Email” and re-enter the email address of the Firm’s Primary Point of Contact.



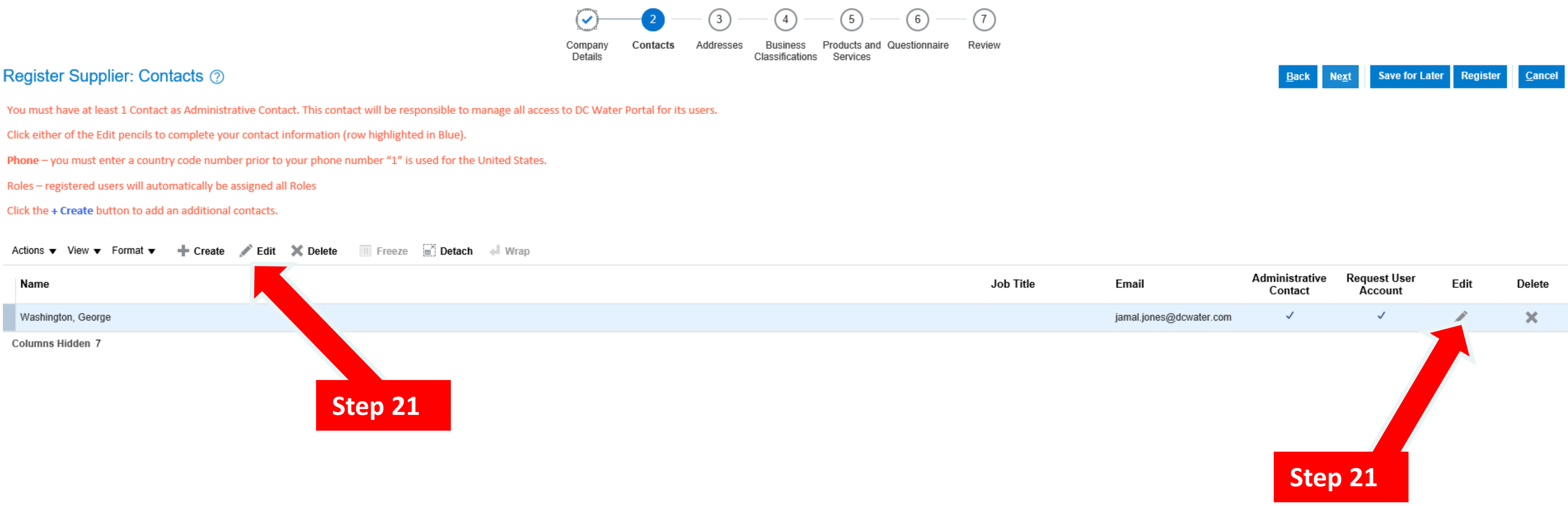
Step 3: Click Next

16) After the Principal Point of Contact's Email has been entered and confirmed, click "Next" in the ribbon (upper right) to continue the registration process.



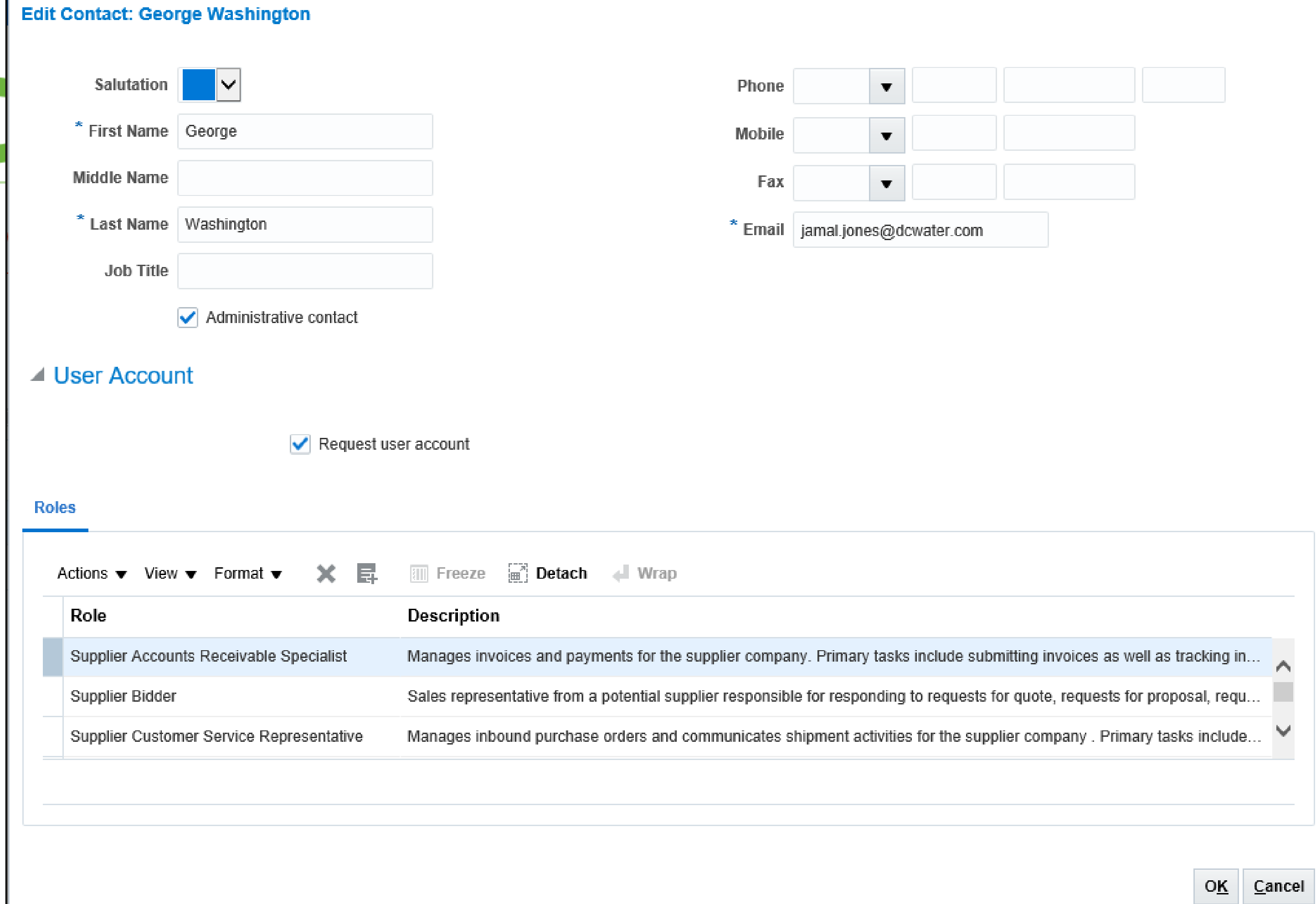
Contacts Screen

17) This screen identifies the points of contacts of the firm.
18) The Name and Email of the Principal Point of Contract is carried over from the previous screen.
19) The Principal Point of Contact is defaulted to have full administrative control of the firm's profile in the system.
20) The contact information for the Principal Point of contact is still incomplete (missing telephone number, job title role, etc. and/or can be edited from this screen.



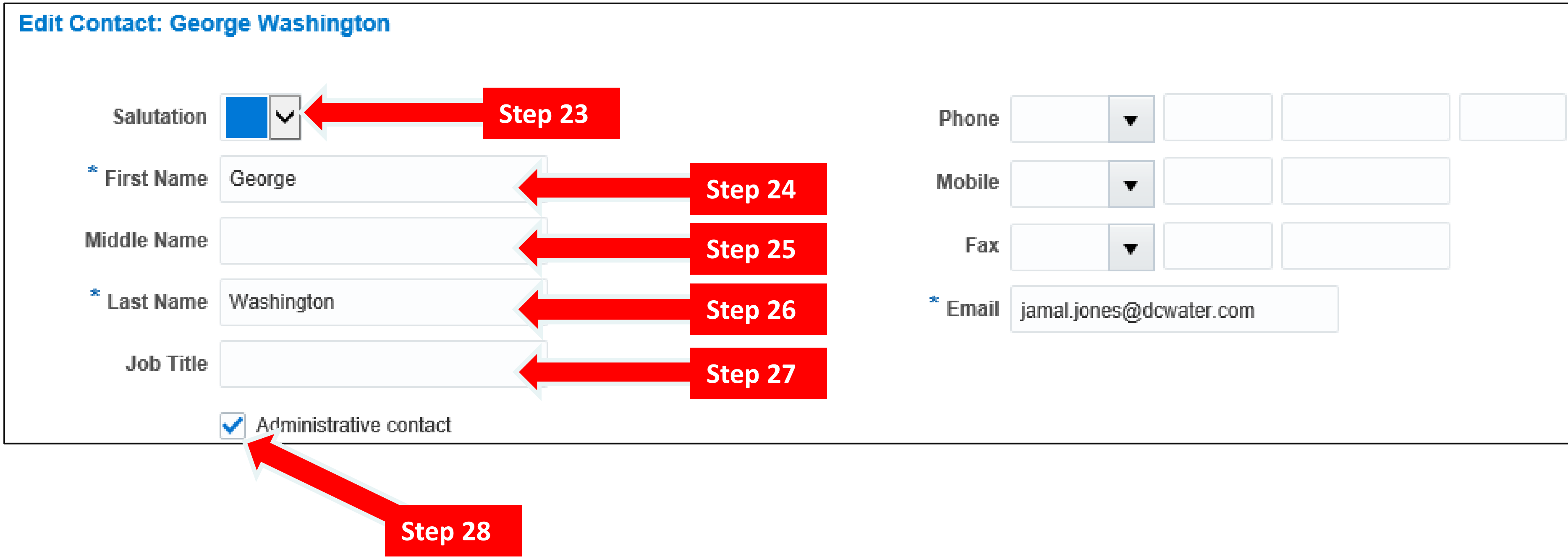
Contacts Screen

21) To update the Principal Point of Contacts profile, click the "Edit" button on the ribbon (top left) or to the right in the blue ribbon.



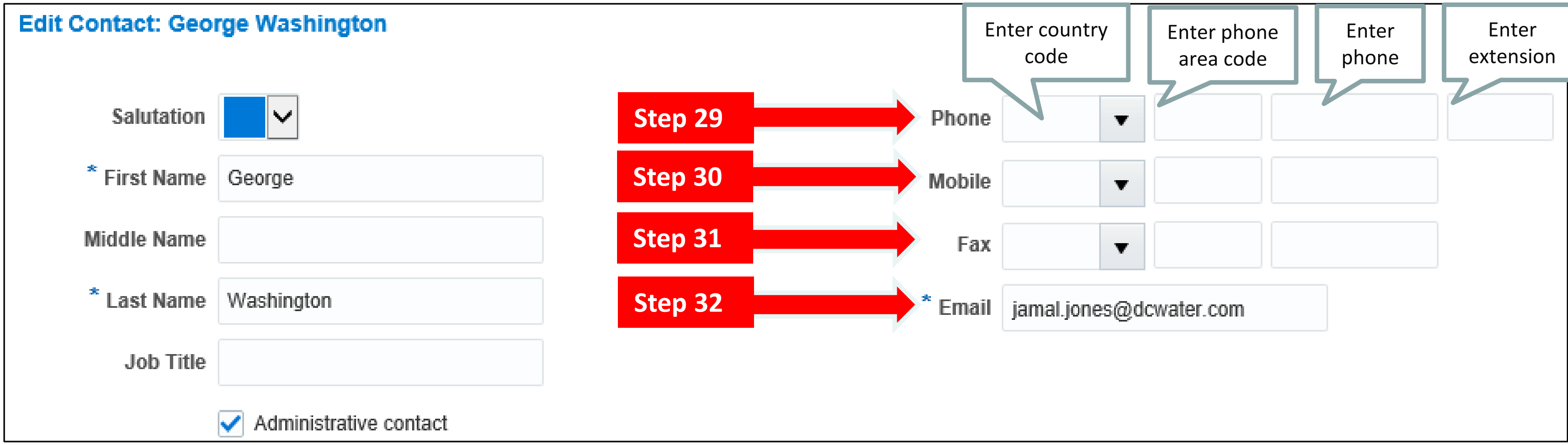
Edit Contacts Screen

22) When you Click “edit” this pop up screen appears. On this screen the complete contact information for the Principal Point of contact can be filled in.



Edit Contacts Screen

23) Use the Drop Arrow in the "Salutation" field to select the appropriate salutation for the Principal Point of Contact.
24) Click in the Space Next to "First Name" to **update** the First Name of the Firm's Primary Point of Contact.
25) Click in the Space Next to "Middle Name" to Type the Middle Name of the Firm's Primary Point of Contact.
26) Click in the Space Next to "Last Name" to **update** the Last Name of the Firm's Primary Point of Contact.
27) Click the Space Next to "Job Title" to Type the Corporate Title of the Firm's Primary Point of Contact.
28) Confirm the Principal Point of Contact is the "Administrative Contact" for the vendor portal by clicking the check box.

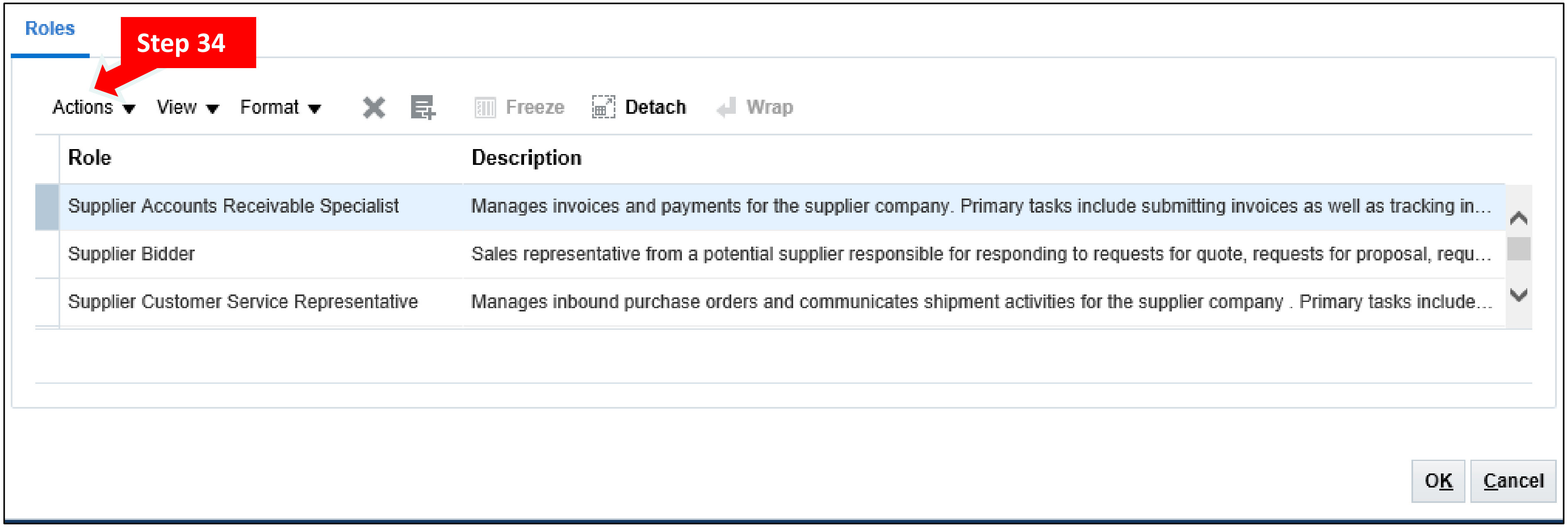


Edit Contacts Screen

29) Click in the Space Next to "Phone" to update the Telephone Number of the Firm's Primary Point of Contact. Please note the first field is for the country code ("1" for US numbers). The Second Field is for the Area Code. The Third Field is for the number. The Fourth Field is for any extension.
30) Click in the Space Next to "Mobile" to update the Cell Phone Number of the Firm's Primary Point of Contact. Please note numbering convention is the same as the primary number.
31) Click in the Space Next to "Fax" to update the Fax Number of the Firm's Primary Point of Contact.
32) Click in the Space Next to "Email" to update the email address of the Firm's Primary Point of Contact.

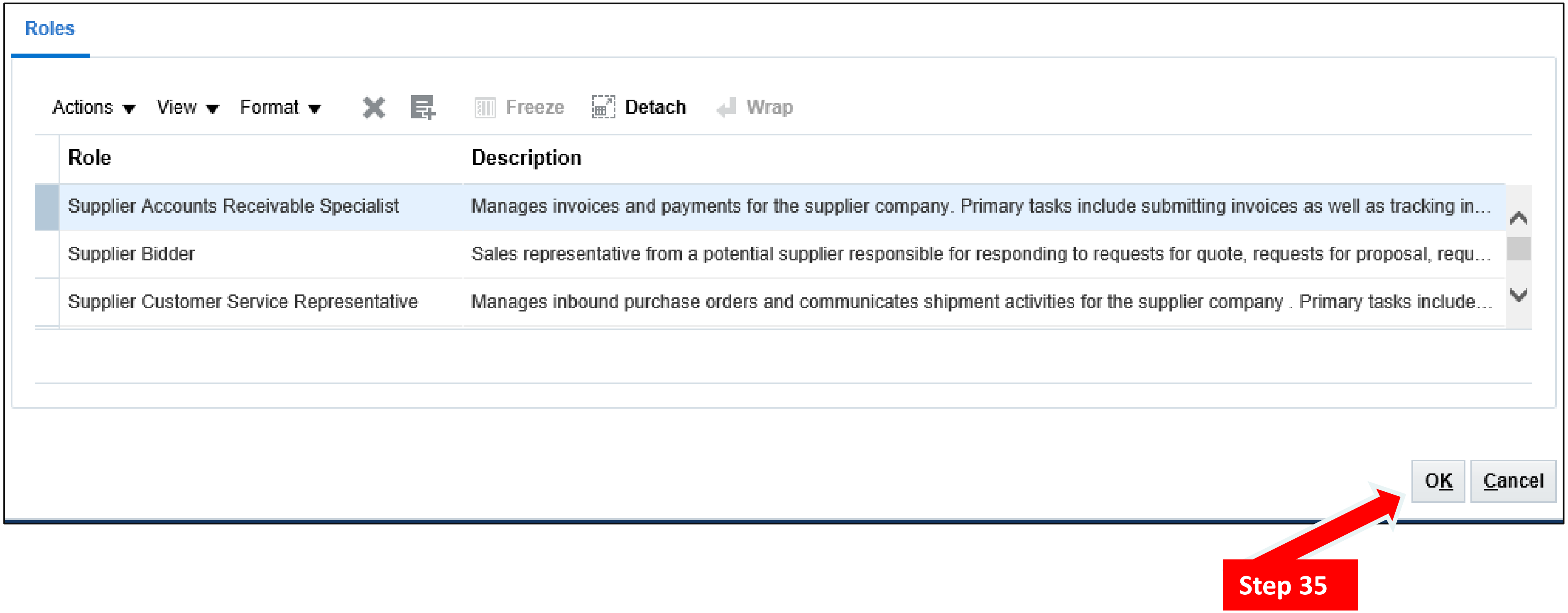
Edit Contacts Screen

33) Confirm the Principal Point of Contact is requesting a “User Account”. The Primary Point of contact must have an active account.



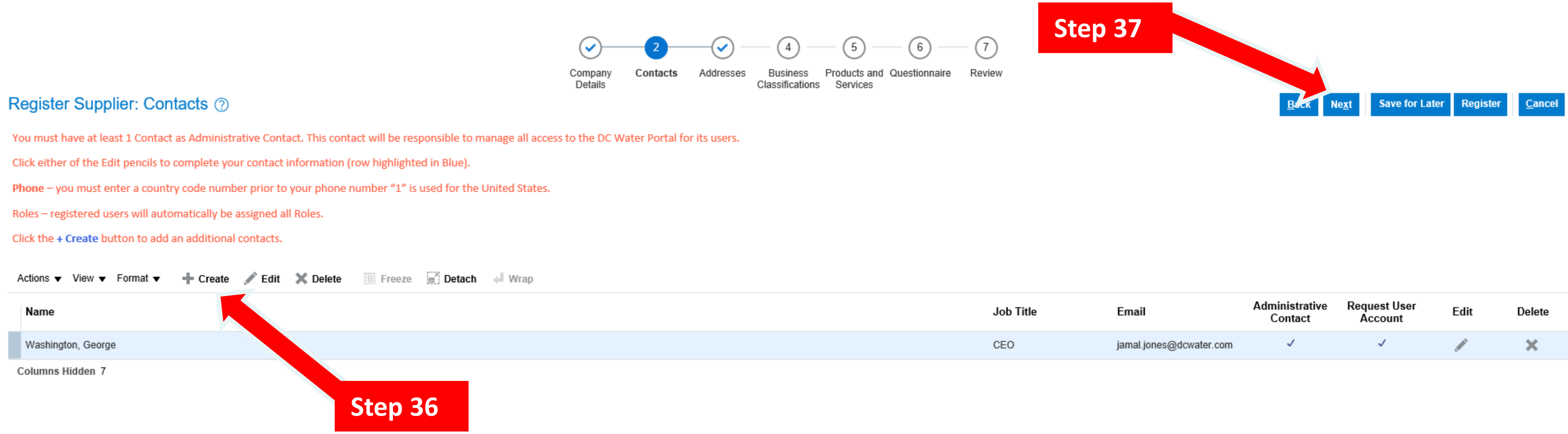
Edit Contacts Screen: “Roles”

34) Review the “roles” identified for the Principal Point of Contact. If something needs to be changed, click the “Actions” button and make the necessary selection(s). Each person who is registered will be assigned all roles.



Step 4: Click OK

35) After the Principal Point of Contact’s Role(s) have been confirmed, click “OK” in the ribbon (lower right) to continue the registration process.



Step 5: Click Next

36) After you click "OK" you will be returned to the "Register Supplier: Contacts" Screen. From here, you can add a new contact by clicking the "Create Button, and follow the same steps as before.
37) Otherwise, click "Next" in ribbon to the upper right to continue.

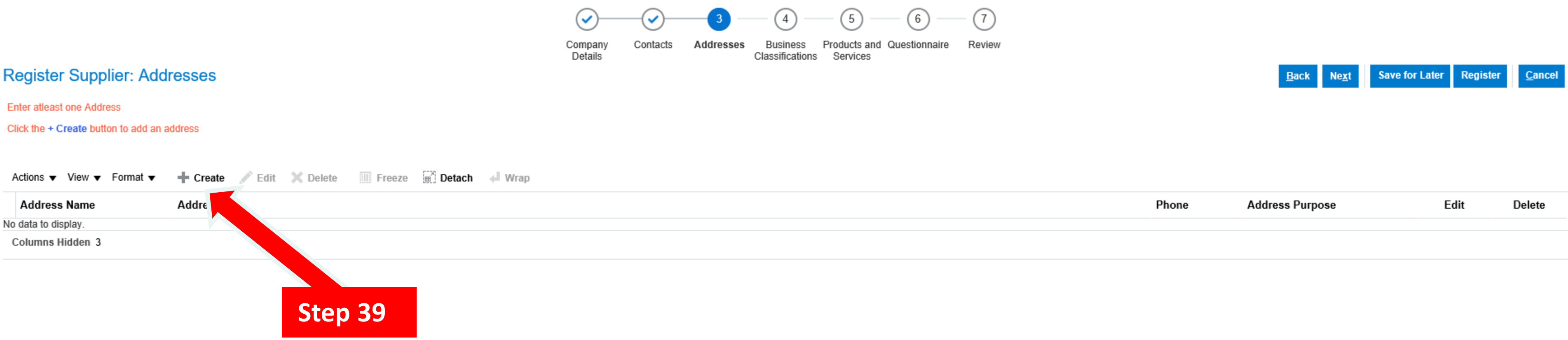
- **Must's and Tips**

  - Enter at least 2 Contacts. 1 each for:
    - Supplier Bidder role (person who receives invitation to solicitations)
    - Administrator (person who can manage accounts)

    (can be the same person – entered twice).

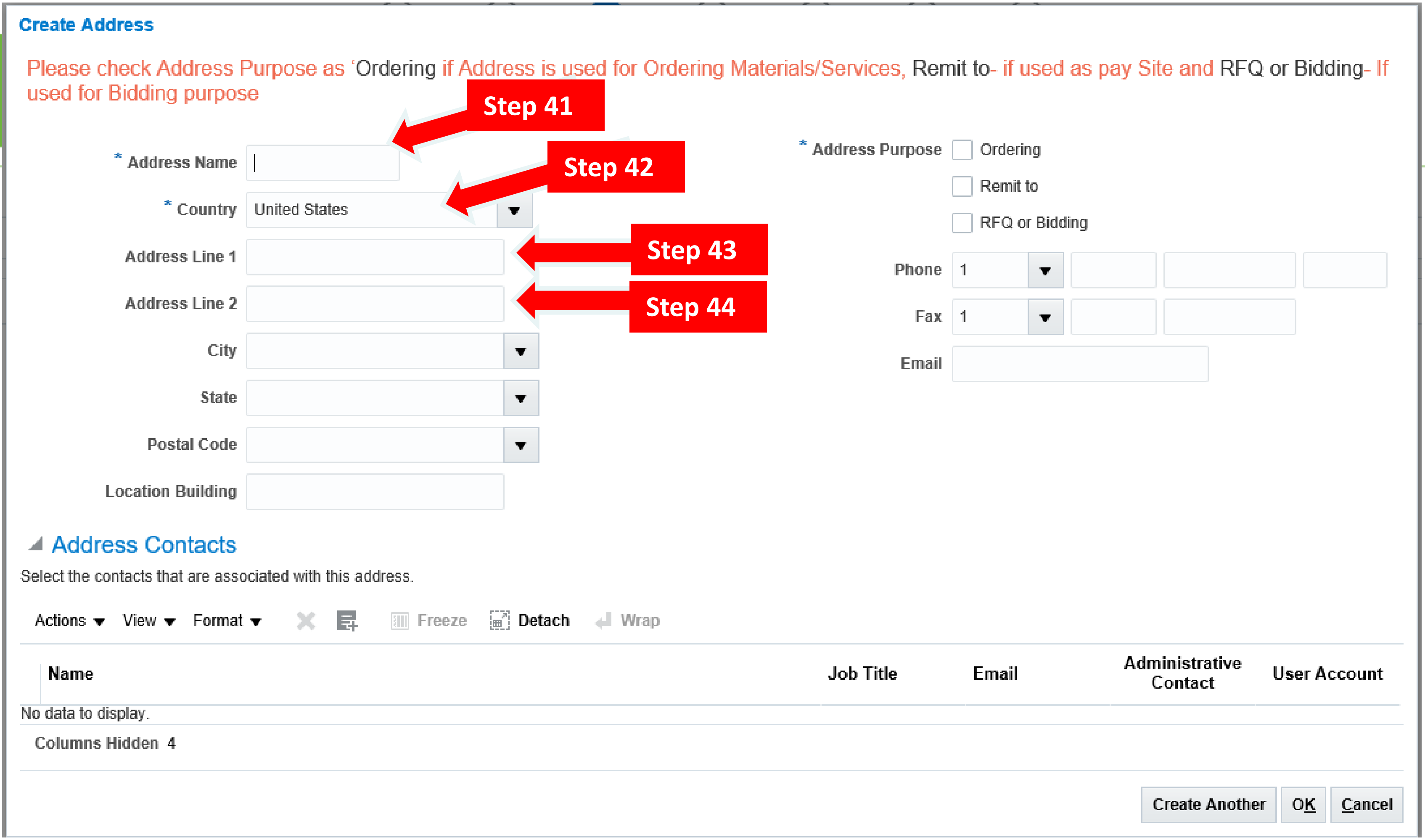
  - Enter tel and email address to receive news, invitation to solicitation, and POs

  - Contact vs. Address
    - Address is the mailing address of contact
    - News, invitation to solicitation, and POs are sent to the email address entered in Contacts, not to the email address included in Address



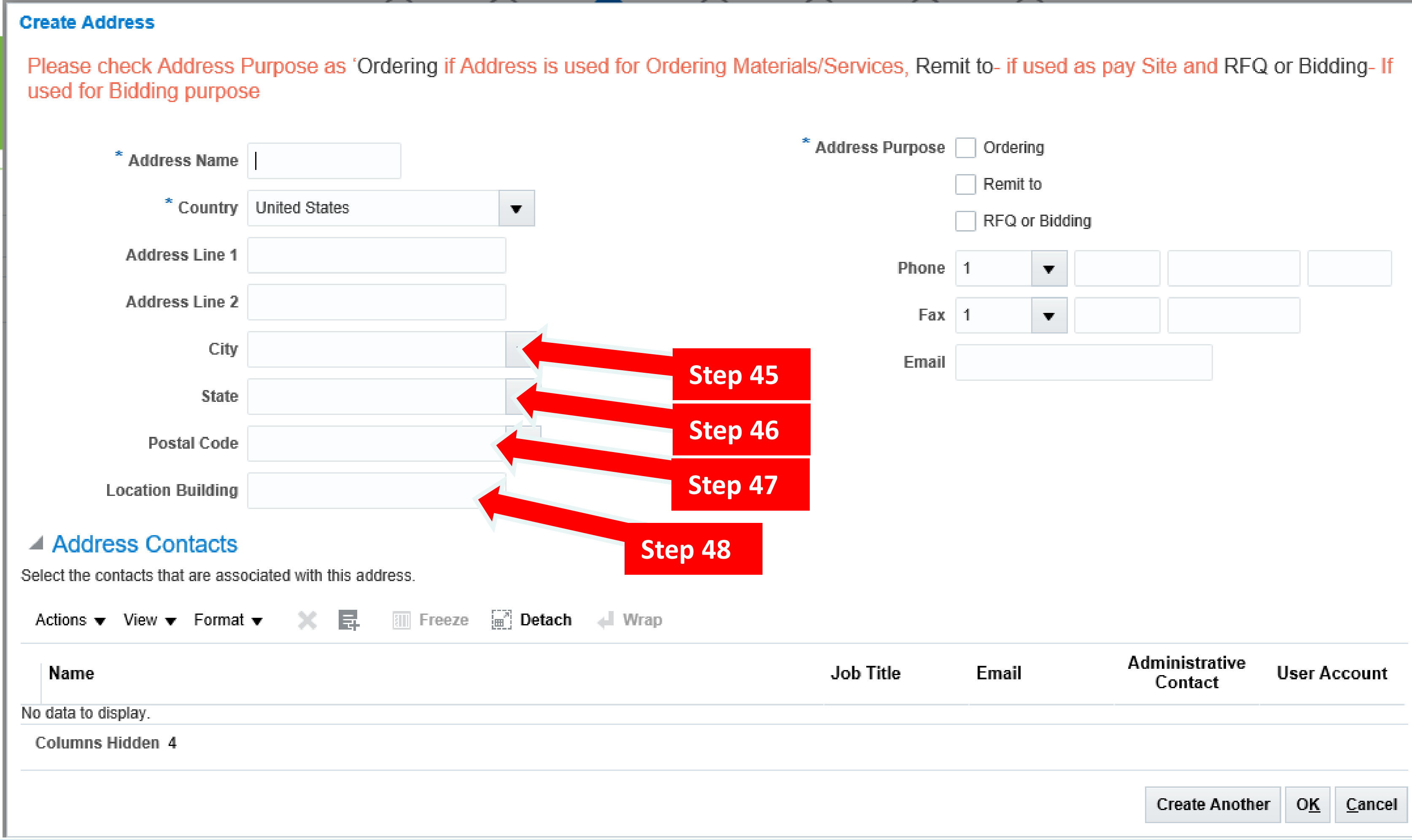
Addresses Screen

38) This screen identifies the address(es) of the firm.
39) To begin adding/updating the address, click on the “create” button.



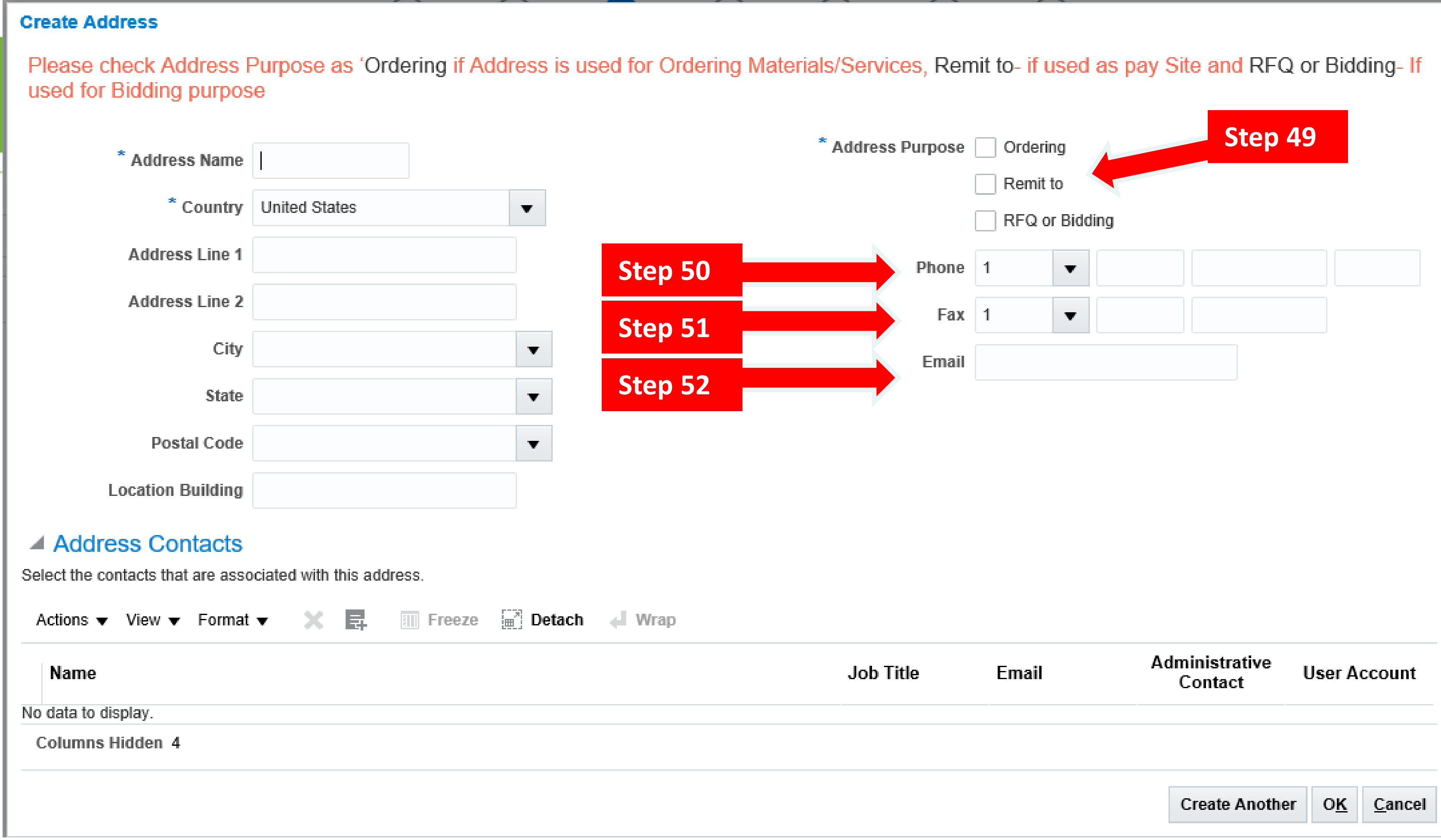
Addresses Screen

40) When you click create, the above "pop up" screen appears. This is where the address information is added.
41) Click in the space next to "Address Name" to Type in a shortcut (Main Purch) for this particular address.
42) Click the button next to "Country" to select the country connected with this address. The default is "United States".
43) Click in the space next to "Address Line 1" to Type in the Street Address.
44) Click in the space next to "Address Line 2" to Type in a Suite or Room Number, etc.



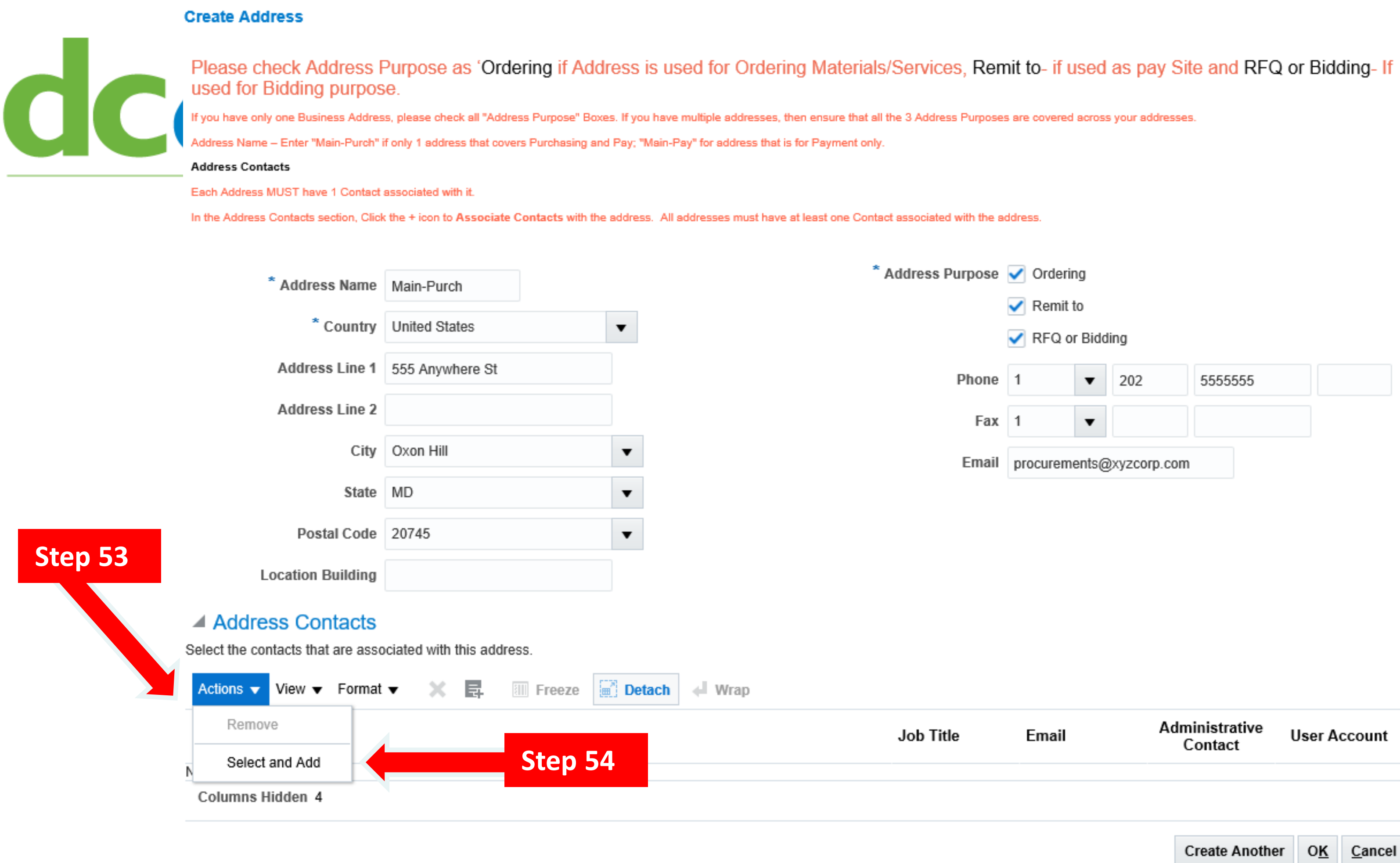
Addresses Screen

45) Click the button next to "City" to select the city connected with this address.
46) Click the button next to "State" to select the state connected with this address.
47) Click the button next to "Postal Code" to select the zip code connected with this address.
48) (Optional) Click in the space next to "Location Building" to Type in a specific location of the office.



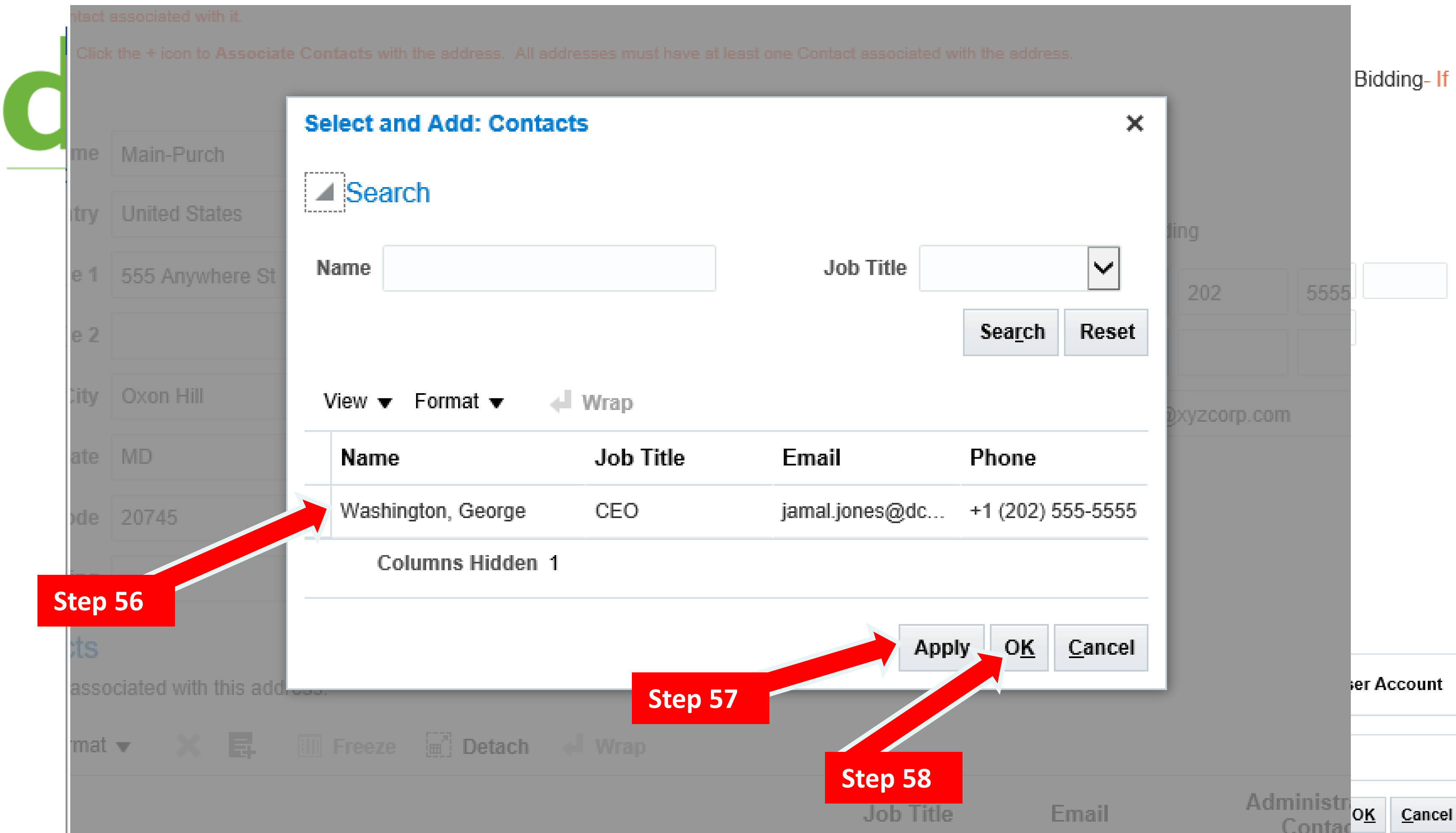
Addresses Screen

49) Click one or more of the buttons next to "Address Purpose". Select "Ordering" if address is used to order materials, "Remit to" if used as Pay Site, or "RFQ or Bidding" if used for bidding purposes.
50) Click the space next to "Phone" to Type in the phone number (beginning with the country and area codes) for this address.
51) Click the space next to "Fax" to Type in the fax number connected with this address.
52) Click the space next to "email" to Type in the email connected with this address.



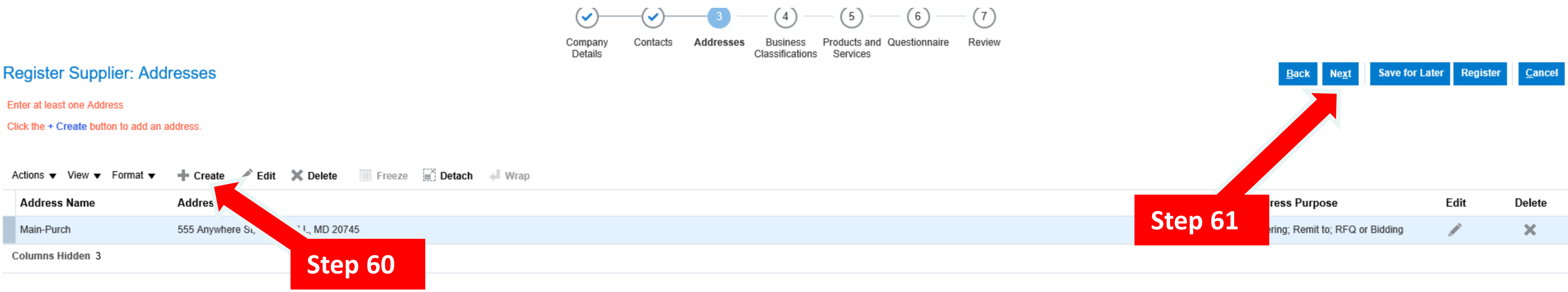
Addresses Screen

53) Once the address have been entered, click the “Actions” button.
54) Click the “Select and Add” from the pop up.



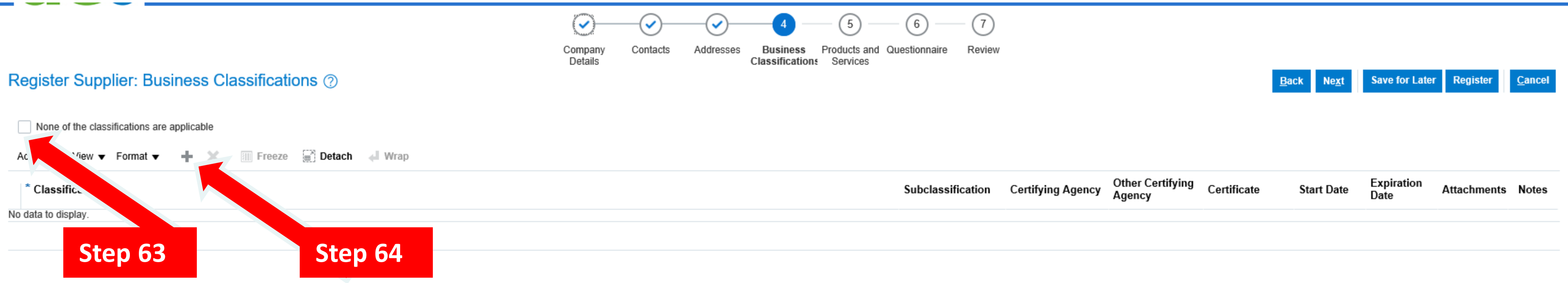
Addresses Screen

55) When you click “Select and Add”, the above pop up screen will appear. At this point, although the address was created, it has not been applied to the registration.
56) To do so, click the open space next to the firm name.
57) Then click “Apply”.
58) Then click “Ok”.



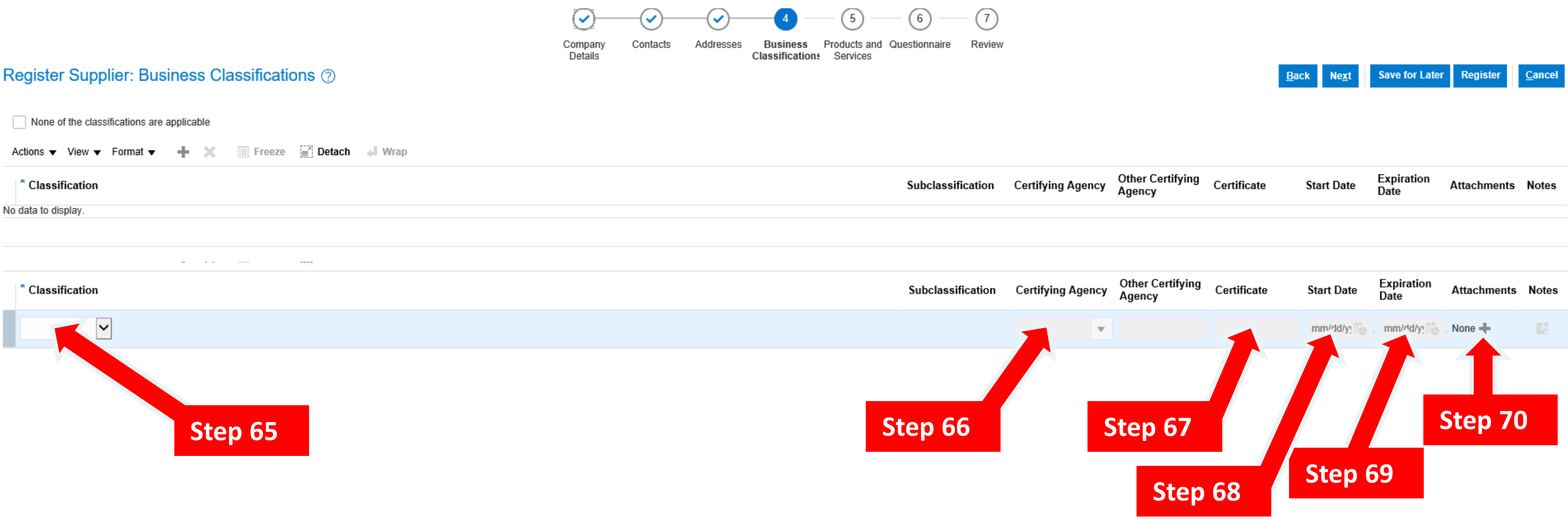
Addresses Screen

59) When you click ok, you will be returned to the main “Addresses” screen.
60) If there are more addresses that need to be entered, click “Create”.
61) Otherwise, click “Next” to continue.



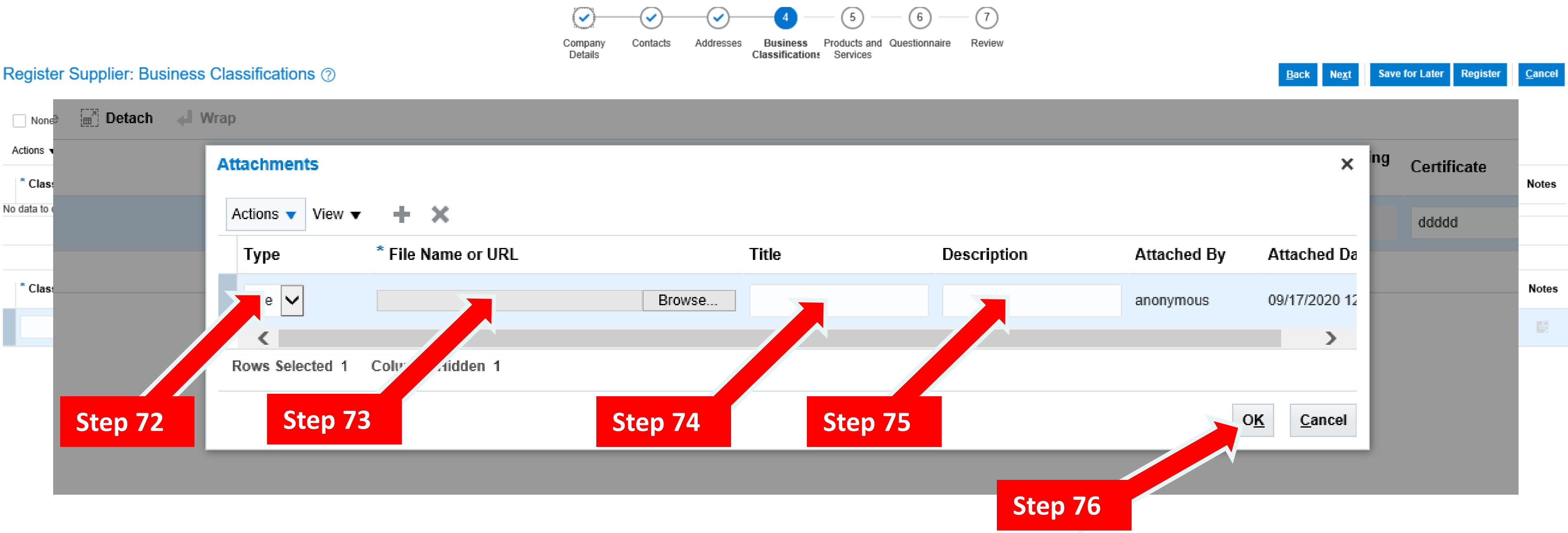
Section 4: Business Certifications

62) This screen identifies the small business certifications held by the firm.
63) If the firm is not certified, click the "None of the certifications are applicable".
64) To begin adding/updating the firm's certifications, click on the "**+**" icon.



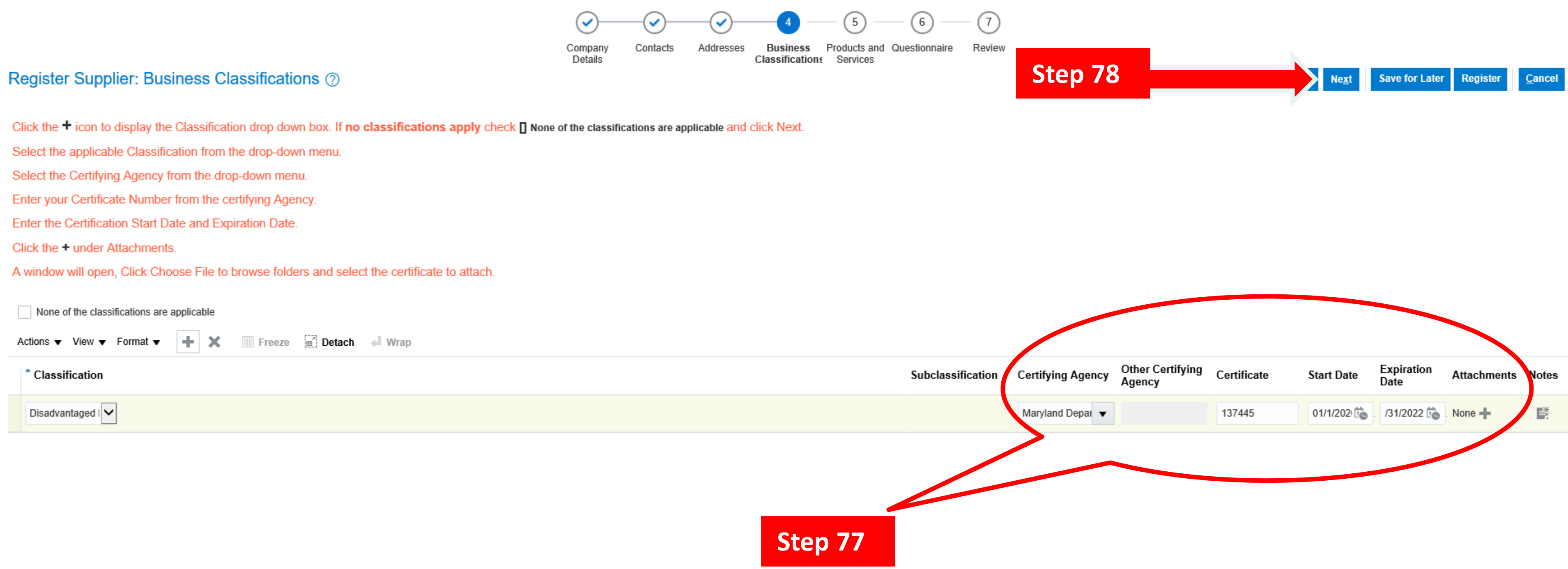
Business Certifications Screen

64) When you click the "+" icon, the pop up screen above appears.
65) To begin, click on the button under "Classifications" and select the appropriate certification type.
66) Next, click on the button under "Certifying Agency" and select the appropriate agency/authority.
67) In the space under Certificate, Type your firm's certification number.
68) In the space under Start Date, Type the date your firm was certified.
69) In the space under Expiration Date, Type the expiration or re-evaluation date for your firm's certification.
70) Click on the "+" icon under attachments to upload a copy of your firm's certification letter, profile , or certificate.



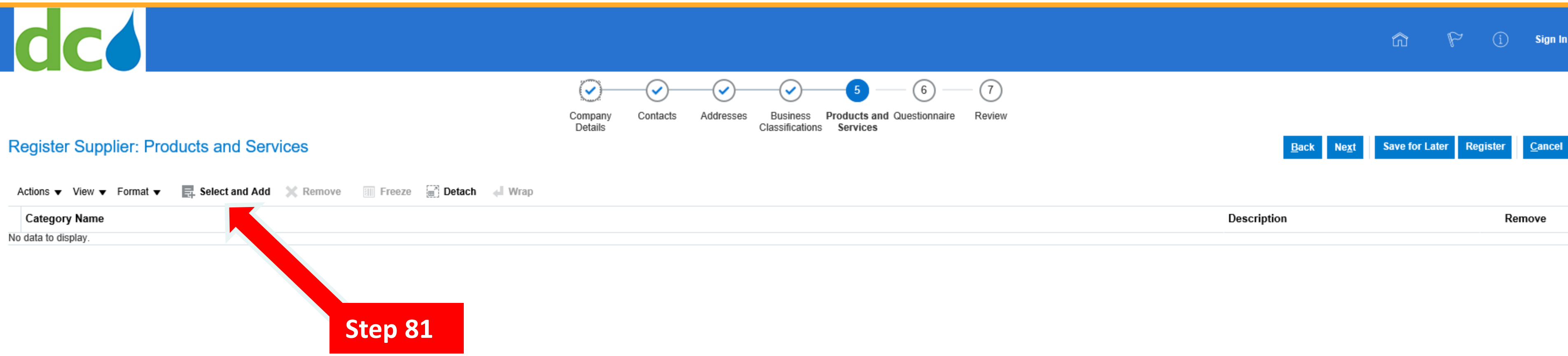
Business Certifications Screen

71) When you click the "+" icon, the pop up screen above appears.
72) In the drop box under "Type", select the format of the attachment (url, pdf, text file, etc).
73) In the drop box under "File Name or URL", select the file to be uploaded.
74) In the space under "Title", Type in a name of the attachment.
75) (Optional) In the space under "Description" Type a brief description of the attachment.
76) When you are finished, click "OK".



Business Certifications Screen

77) When you click the “OK”, you will be returned to the Business Classification Home Screen. Please note the complete certification data will appear.
78) If everything looks ok, click “Next” to continue.



Products and Services Screen

79) When you click "Next", you will move to the "Products and Services" main screen.
80) This screen is used to identify the products and services your firm in "ready, willing, and able to provide to DC Water.
81) To begin, click "Select and Add".

Products and Services

Category Class

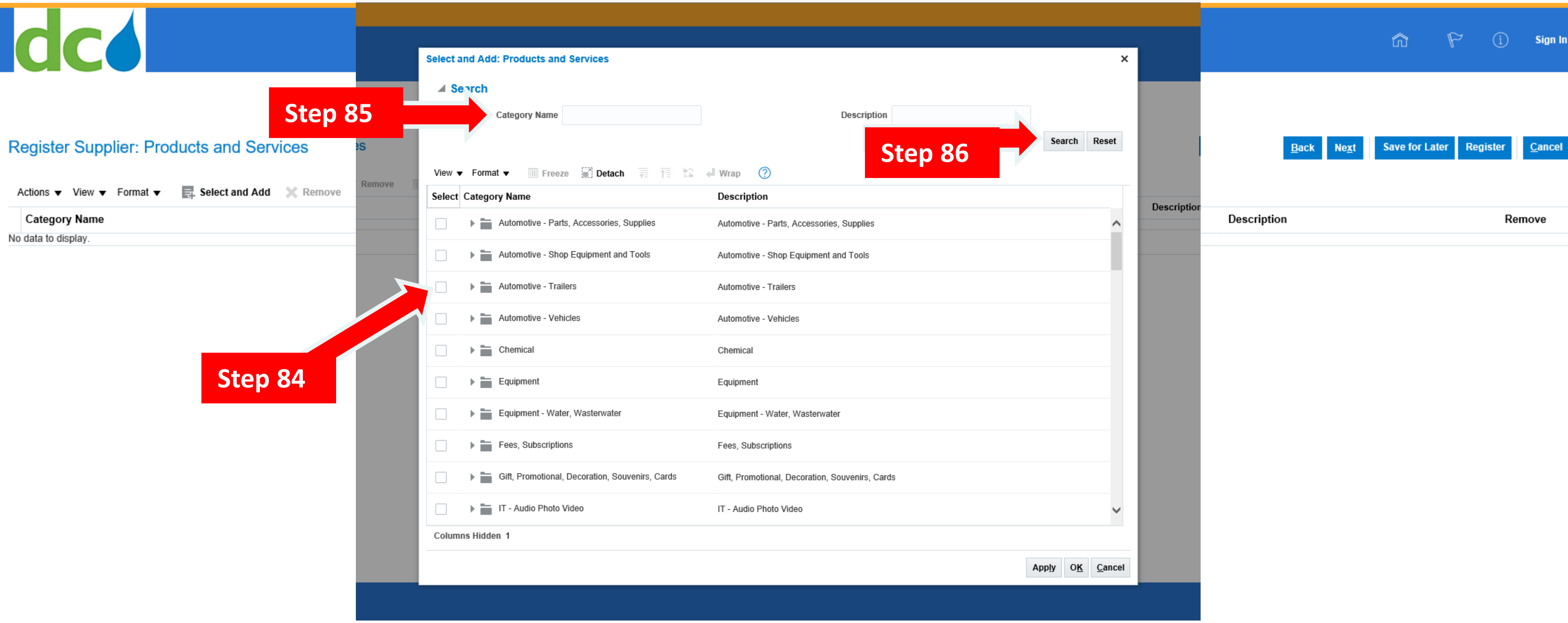
Select	Category Name	Description
☐	Automotive - Parts, Accessories, Supplies	Automotive - Parts, Accessories, Supplies
☐	055 Automotive parts, accessories, supplies except ti	Automotive parts, accessories, supplies except tires
☐	055 Tires	Tires
☐	Automotive - Shop Equipment and Tools	Automotive - Shop Equipment and Tools
☐	075 Automotive shop equipment and tools except lifts	Automotive shop equipment and tools except lifts
☐	075 Automotive shop lifts and hoists, floor type, electi	Automotive shop lifts and hoists, floor type, electric, hydraulic or pneumatic
☐	Automotive - Trailers	Automotive - Trailers
☐	Automotive - Vehicles	Automotive - Vehicles
☐	Chemical	Chemical
☐	Equipment	Equipment

Category Item

(3 or 5 digit number Is based on the NIGP code system)

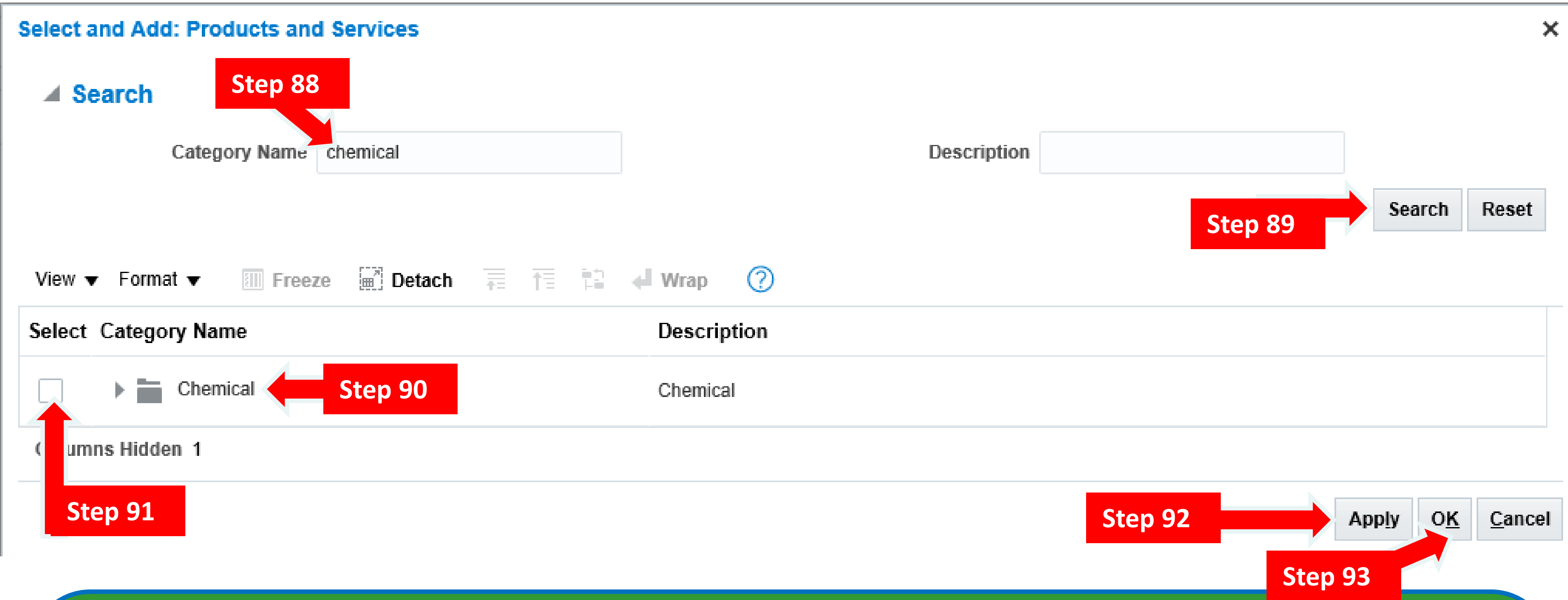
Select by Category Class or by each Category Item or both

If you select a Category Class, you are also selecting all items in that class. When unsure, always select the Category Class.



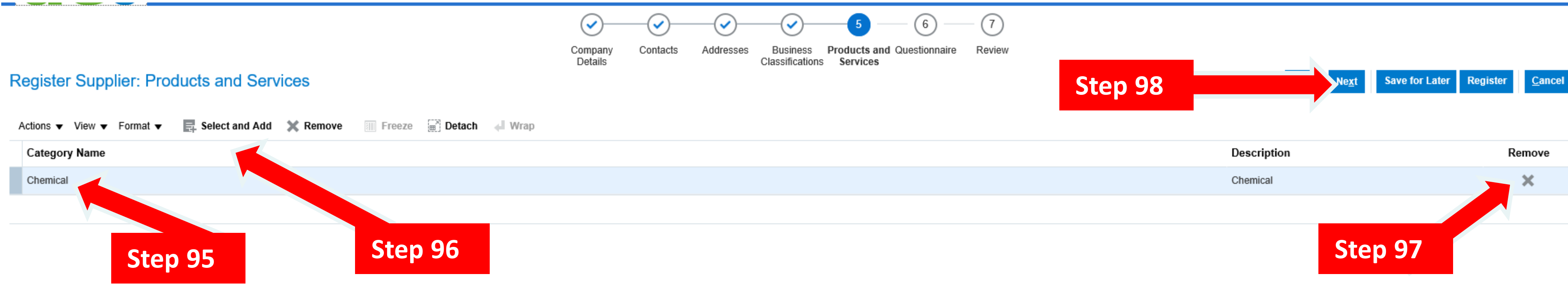
Products and Services Screen

82) When you click “Select and Add”, the following pop up will appear.
83) This pop up contain the list of products and services DC Water buys. Firms can select multiple choices.
84) To Select a product or service, click on the corresponding box next to its name.
85) To Search for a product or service, type in the name in the open space next to “Category Name” .
86) Then click on the “Search” button.



Products and Services Screen

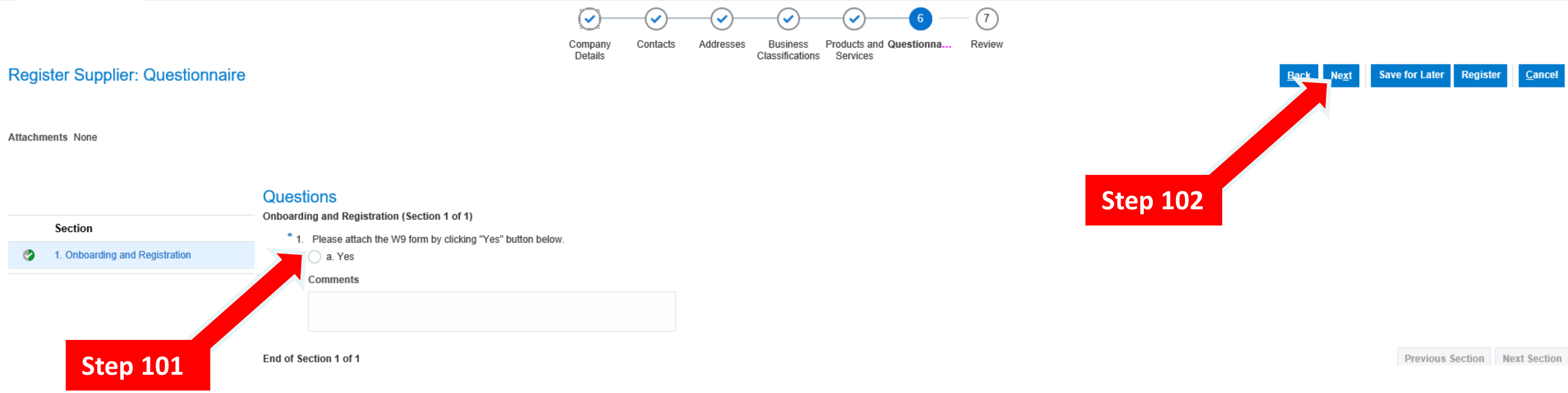
87) Example: Firm is adding “Chemical” to its list of products.
88) Type “Chemical” in the Category Name.
89) Then Click “Search”.
90) The search returned one Product Name.
91) Click on the Open Space under “Select” to add Chemical to the firm’s list.
92) Click the “Apply” Button on the lower right.
93) Click “OK”.



Products and Services Screen

94) When you click “OK”, you will be returned to the “Products and Services” main screen.
95) Please note the new product (in this case “Chemical”) was added.
96) If additional products or services needs to be added, click “Select and Add” and follow the previous steps.
97) If something was added in error, click the “Remove” button on the line that is not wanted.
98) When you are ready, click “Next” to continue.

- **Must's and Tips for Products and Services**
  - Products and Services is the list of items and services that DC Water may purchase.
    - NIGP code is used for goods and services and small constructions
    - NAICS code is used for capital constructions
  - DC Water Online Oracle Solicitation System finds vendors by the Products and Services that the vendor selected during the registration (saved in the Profile).
    - When a new solicitation is published, it sends an automatic notice to all vendors who have selected a particular product or service
  - You must select Products and Services that your company is selling.
  - If you don't, then you will not receive any invitation. You must search the solicitations manually.
  - List of all DC Water Products and Services is available at www.dcwater.com/procurement for your use.

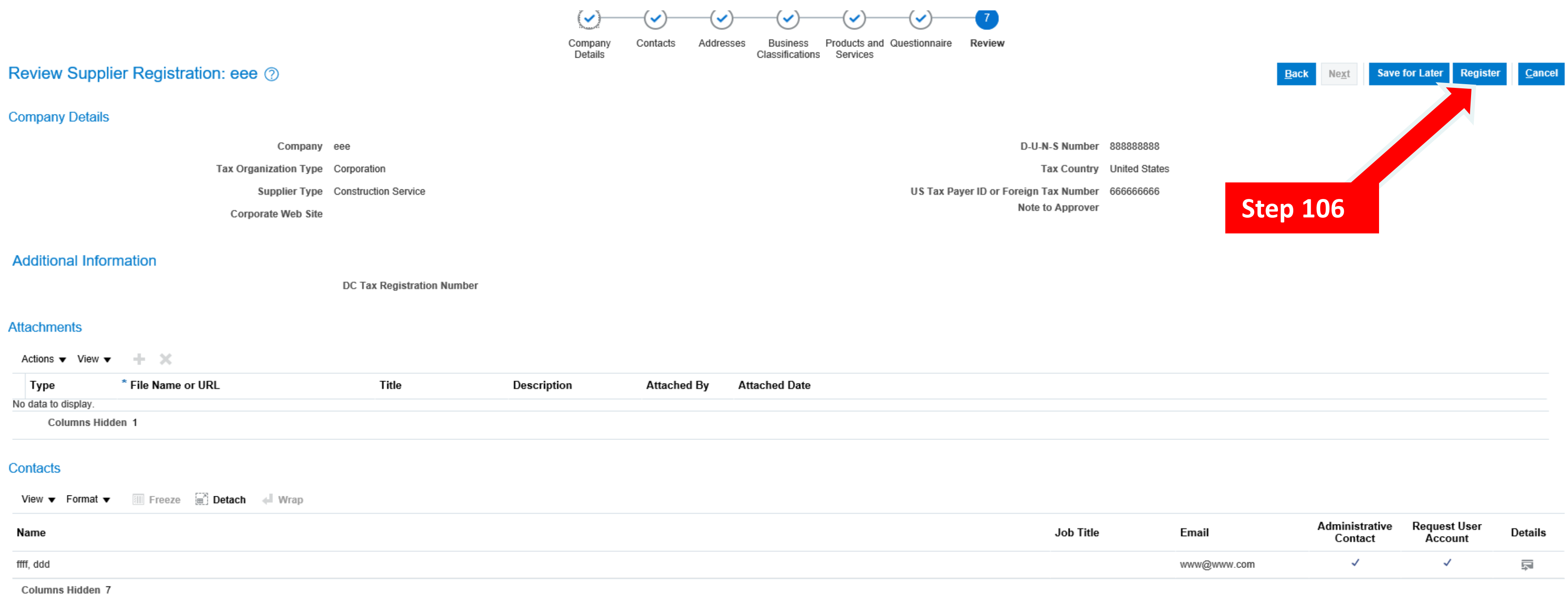


Questionnaire Screen

99) When you click "Next", you will be moved to "Questionnaire" screen.
100) This screen is used to capture any additional documents required for registration – specifically the firms' W-9.
101) To begin, click the "Yes" button to attach the W-9.
102) Once attached, click "Next" to continue.

water is life

District of Columbia Water and Sewer Authority
David L. Gadis, CEO and General Manager



Review Screen

103) Click "Next", to move to the "Review" screen.
104) This screen provides a summary of the information you entered during the registration.
105) Please review the information on this screen for completion and correction.
106) If everything is in order, click the "Register" button in the top right.
107) Congratulations!!! You have successfully registered with DC Water.
108) You will receive an email from the system, acknowledging registration, and providing you with a system generated (temporary) password. Your email will be your username.