



Town of Aurora

Supplier User Guide

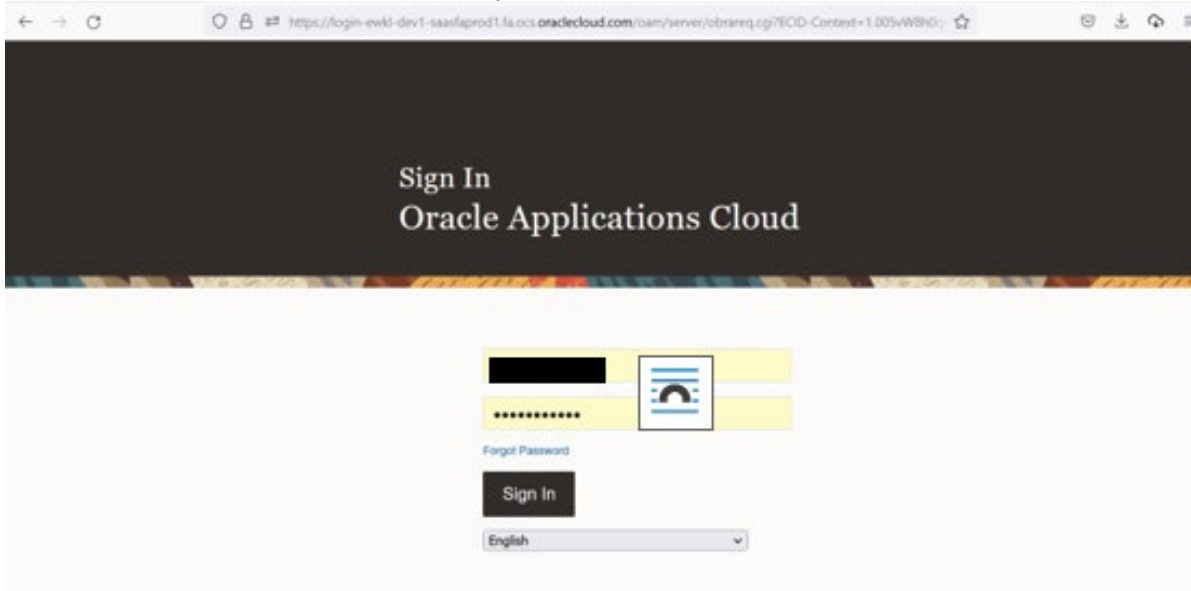
Table of Contents

- 1. ORACLE FUSION CLOUD SUPPLIER PORTAL 3**
 - 1.1 Sign In..... 3
 - 1.2 Home Page..... 3
 - 1.3 Navigation 4
- 2.0 OVERVIEW OF SUPPLIER PORTAL WORK AREA..... 5**
 - 2.1 Make Changes to the Supplier Profile and Provide a Description 5
 - 2.2 Inactivate an Address..... 6
 - 2.3 Inactivate a Contact..... 7
 - 2.4 Update Contact Information..... 8
 - 2.5 Submit a Profile Change Request for Approval..... 9
 - 2.6 Delete the Profile Change Request 9
- 3.0 RFX AND CONTRACTS 11**
 - 3.1 View Active Negotiations..... 11
 - 3.2 View Attachments Associated with the Negotiation/ Response..... 12
 - 3.3 Acknowledge Participation in Negotiations..... 12
 - 3.4 Create Response in Negotiations 13
 - 3.5 Respond by Spreadsheet..... 13
 - 3.6 Bid Submission for Mid-Value 14
 - 3.6.1 Navigating to the Bid..... 14
 - 3.6.2 Review the Bid 15
 - 3.6.2.1 Cover Page..... 16
 - 3.6.2.2 Overview Area..... 16
 - 3.6.2.3 Review the Specifications/Attachments 16
 - 3.6.2.4 Review the Requirements 17
 - 3.6.2.5 Review Lines Section 18
 - 3.7 Creating A Response/Submitting Bid 19
 - 3.7.1 Overview Train Stop..... 19
 - 3.7.2 Requirements Train Stop..... 20
 - 3.7.3 Lines Train Stop (Pricing)..... 22
 - 3.7.4 Review Train Stop 22
 - 3.7.5 Submit or Save 23
 - 3.7.6 Revise Bid..... 23
 - 3.8 View Contracts..... 25
 - 3.9 View PDF version of Contracts..... 26
 - 3.10 Manage Deliverables 26
 - 3.11 Edit Deliverables and Add Notes/Attachments..... 28
- 4.0 MANAGE ORDERS 30**
 - 4.1 Acknowledge and Accept a PO / BPA..... 30
 - 4.2 Acknowledge Purchase Order Schedules Using Spreadsheet..... 31

1. Oracle Fusion Cloud Supplier Portal

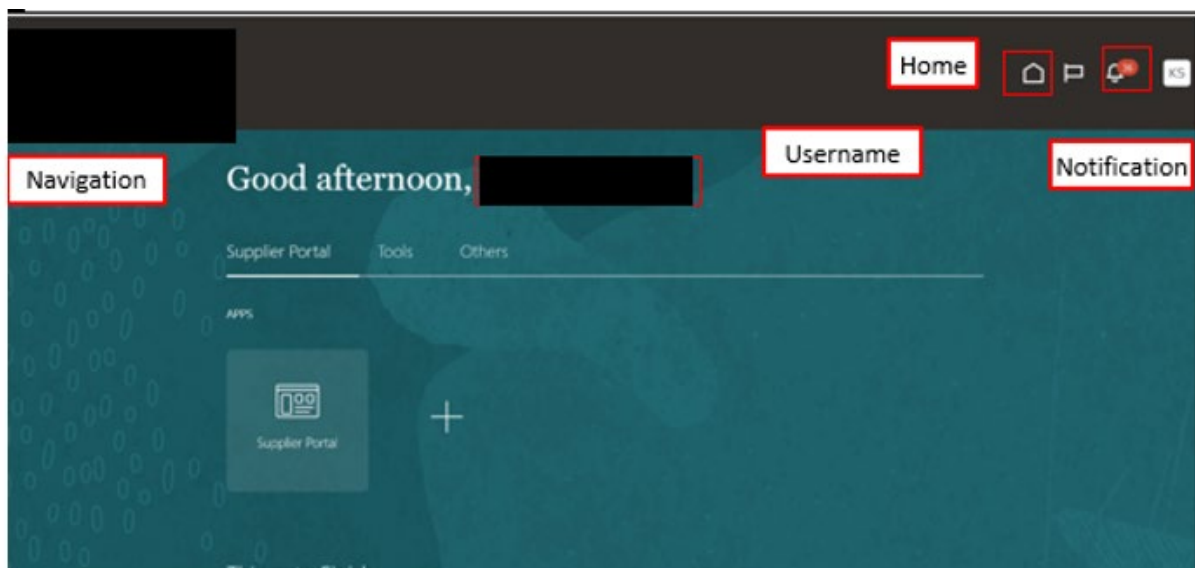
1.1 Sign In

To Sign into Supplier Portal, use the link provided in the welcome email. Then click “forgot password” to reset your password.



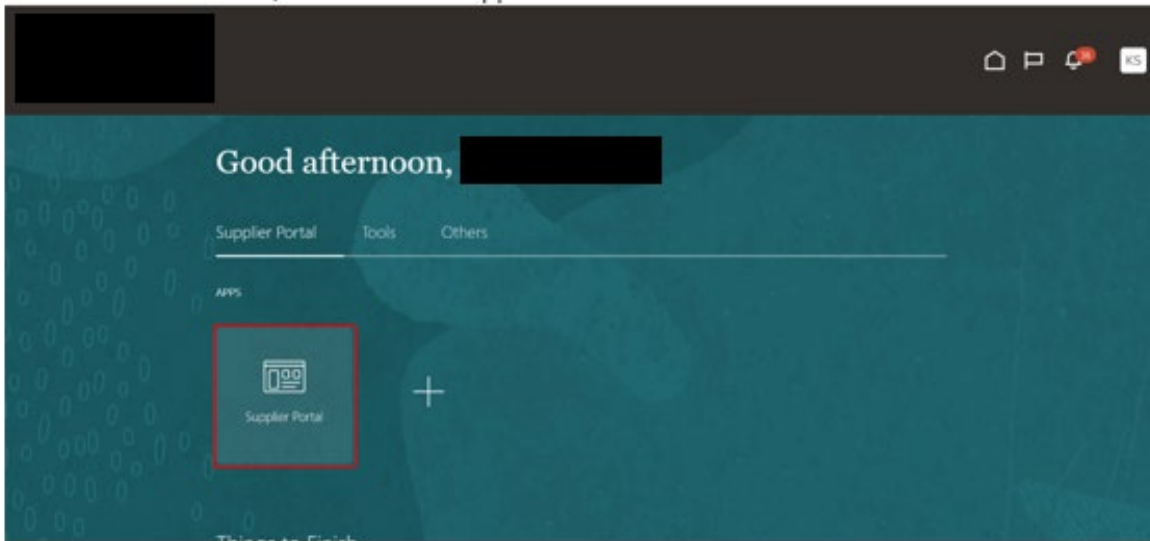
1.2 Home Page

When a user logs into the application, the user can see the Welcome page. A Welcome page has the name of the user, click the Home button task to navigate to the work areas, and Notification button that shows any action item that is received by the user.



1.3 Navigation

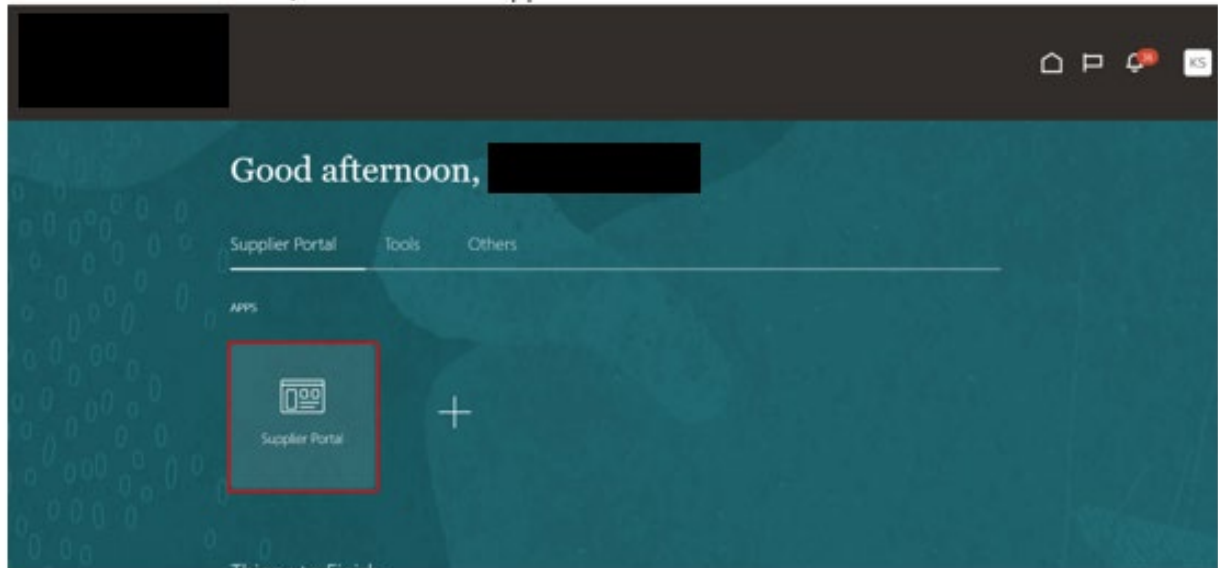
There is one work area, referred to as Supplier Portal



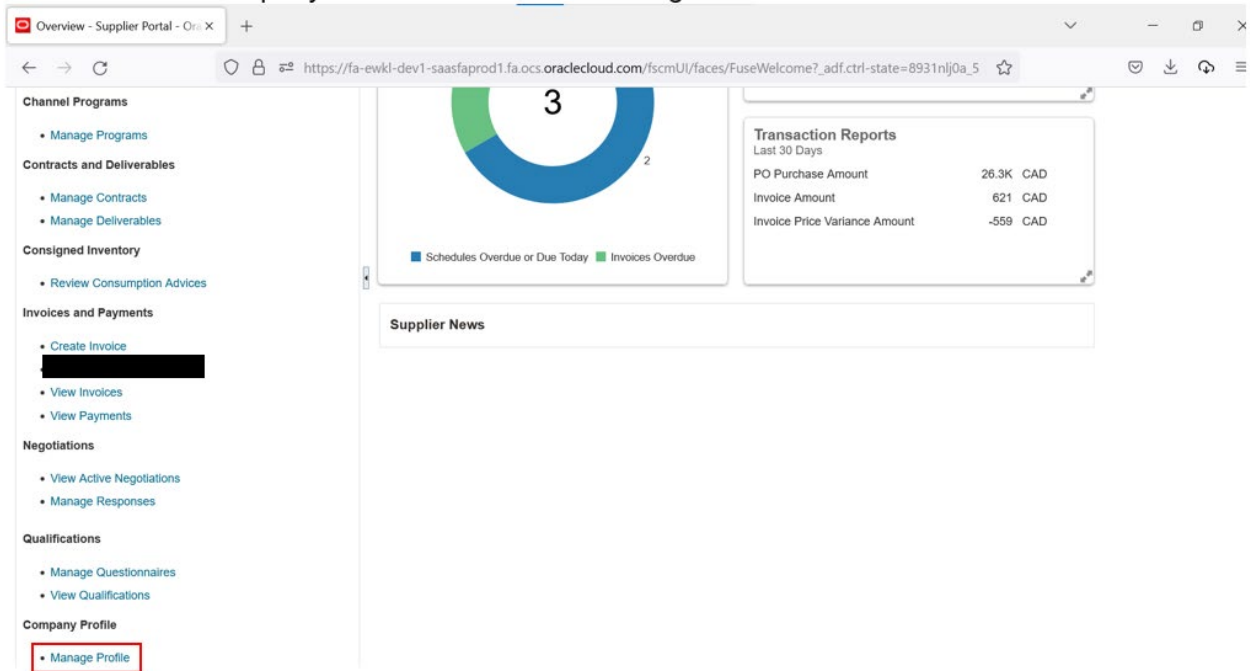
2.0 Overview of Supplier Portal Work Area

2.1 Make Changes to the Supplier Profile and Provide a Description

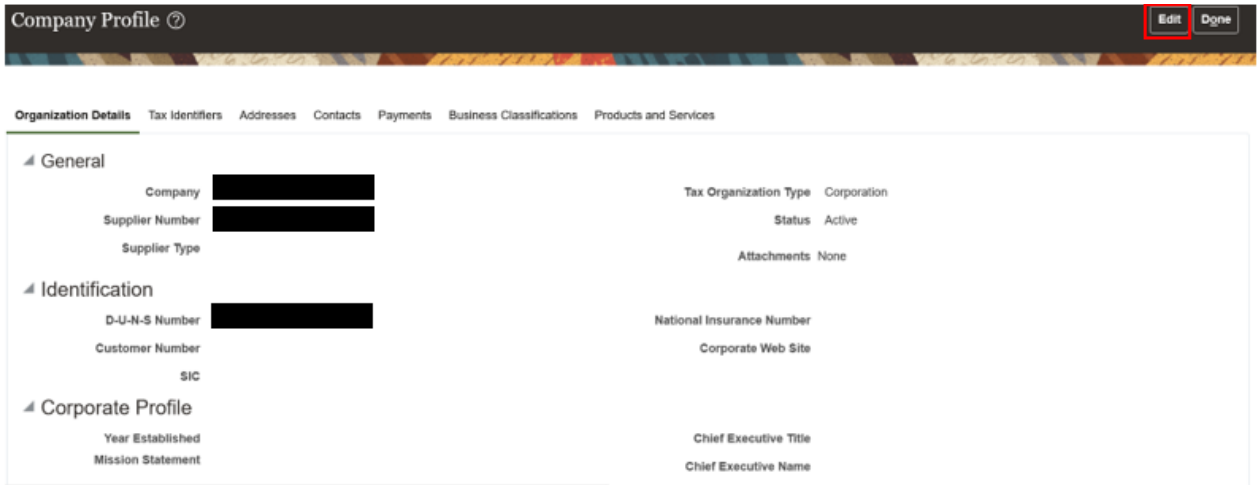
Log into your account and go into the supplier portal work area.



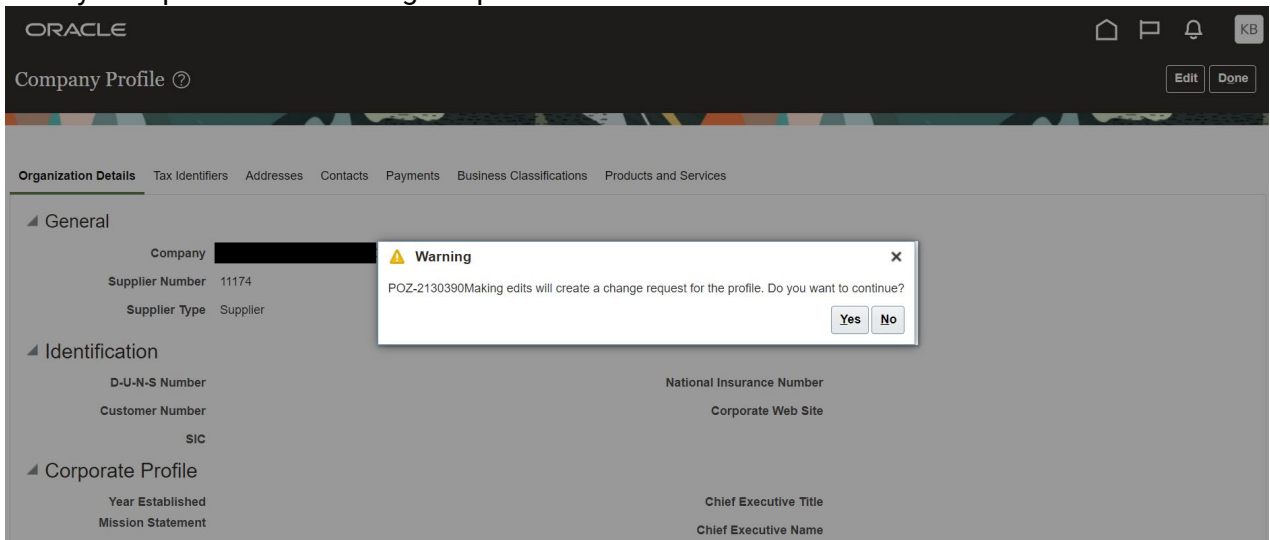
Scroll down to Company Profile tab and click Manage Profile.



Click edit and make the changes.



Click yes to proceed with change request.

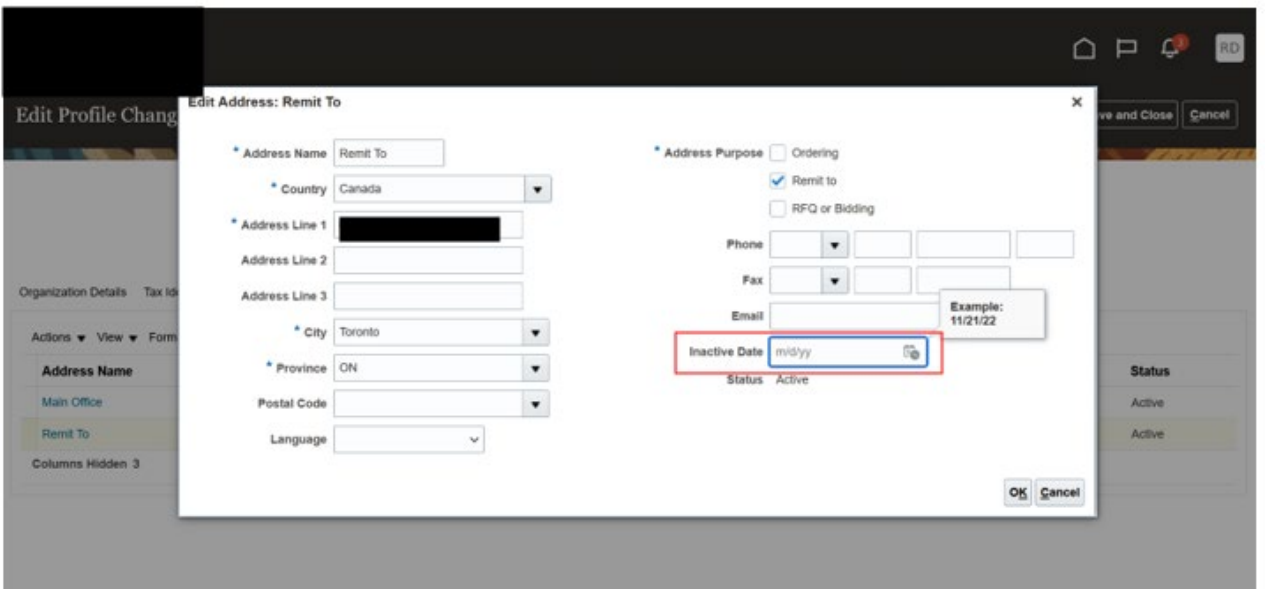
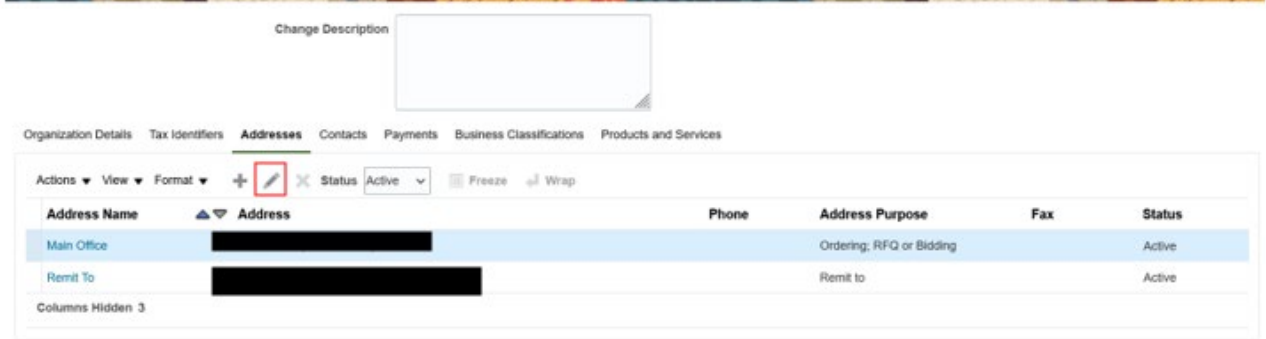
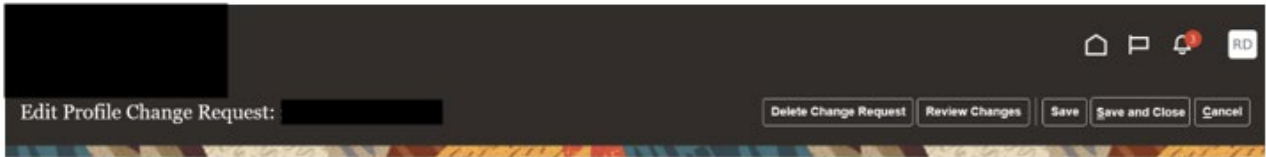


2.2 Inactivate an Address

Click on address tab.

Select the address that needs to be inactive.

Click the pencil icon and select an Inactive Date, then click ok.



2.3 Inactivate a Contact

Click on contact tab.

Select the contact that needs to be inactive.

Click the pencil icon.

Scroll down to User Account area and choose Inactive from the Account Status drop down menu.

Click ok.

Edit Contact: [Redacted] X

Salutation

* First Name

Middle Name

* Last Name

Job Title

Administrative contact

Phone

Mobile

Fax

Email

Status

Contact Addresses

Actions View Format X Freeze Detach Wrap

Address Name	Address	Phone	Address Purpose	Status
Main Office	[Redacted]		Ordering, RFQ or Bidding	Active
Remit To	[Redacted]		Remit to	Active

Columns Hidden 5

User Account

Account Status	Active
User Name	Active [Redacted]@[Redacted].com
Roles	Data Access

2.4 Update Contact Information

Click on contact tab.
 Edit the contact.
 Click ok.

Edit Profile Change Request: [Redacted]

Delete Change Request Review Changes Save Save and Close Cancel

Change Description

Organization Details Tax Identifiers Addresses **Contacts** Payments Business Classifications Products and Services

Actions View Format + [Redacted] X Status Active Freeze Detach Wrap

Name	Job Title	Email	Phone	Administrative Contact	User Account	Status
[Redacted]						Active
[Redacted]	[Redacted]	[Redacted]		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Active

Columns Hidden 7

https://fa-ewkl-dev1-saasprod1.fa.ocs.oraclecloud.com/fscml/Ui/faces/FuseWelcome?_afdc.ctf=state=8931nj0a_5#

2.5 Submit a Profile Change Request for Approval

When the changes are made, select review changes.

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications **Products and Services**

Category Name	Description
35	Paper Products Supplier

Click Submit to request for a profile changes.

Review Changes

Change Description

Organization Details

Attribute	Changed From	Changed To
Supplier Type		Contractor

2.6 Delete the Profile Change Request

To delete profile change request, click on Delete change request button.

Change Description

Organization Details Tax Identifiers Addresses Contacts Payments Business Classifications Products and Services

General

* Supplier Name [Redacted]
Supplier Number [Redacted]
Supplier Type Supplier

Tax Organization Type Corporation
Status Active
Attachments None

Identification

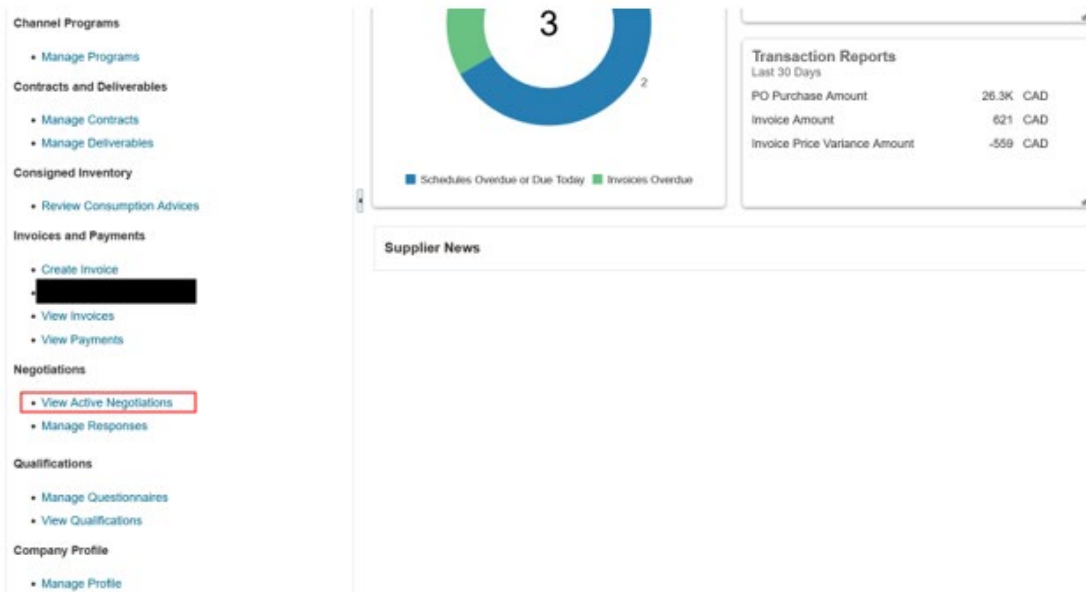
D-U-N-S Number
Customer Number
SIC

National Insurance Number
Corporate Web Site

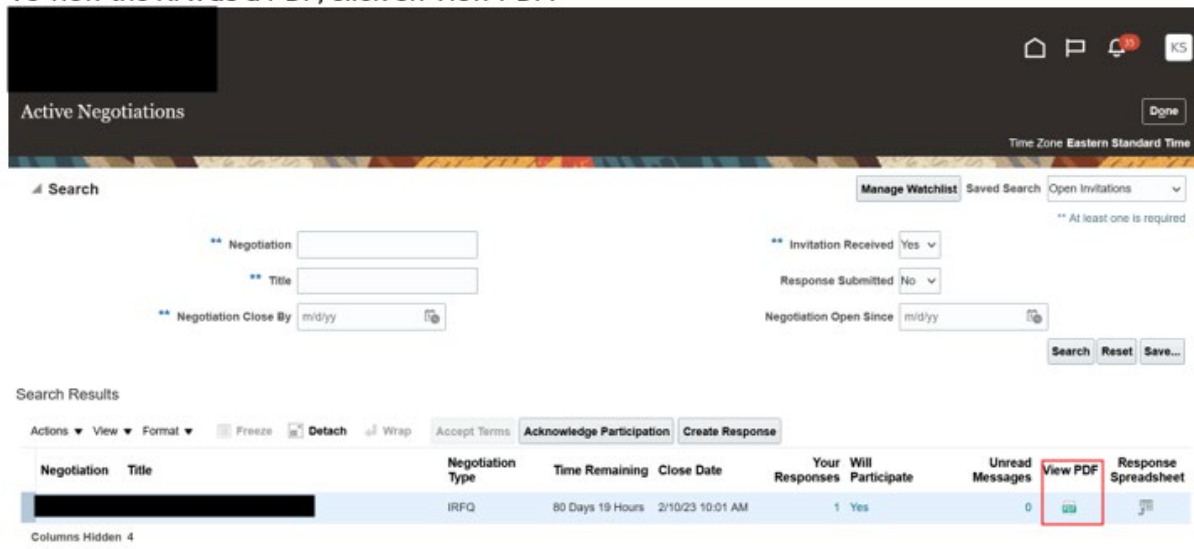
3.0 RFx and Contracts

3.1 View Active Negotiations

From the Supplier portal, under the Negotiations tab, click View Active Negotiations. This work area is to view all the RFx / bids that you can submit a quote for to the Town of Aurora.

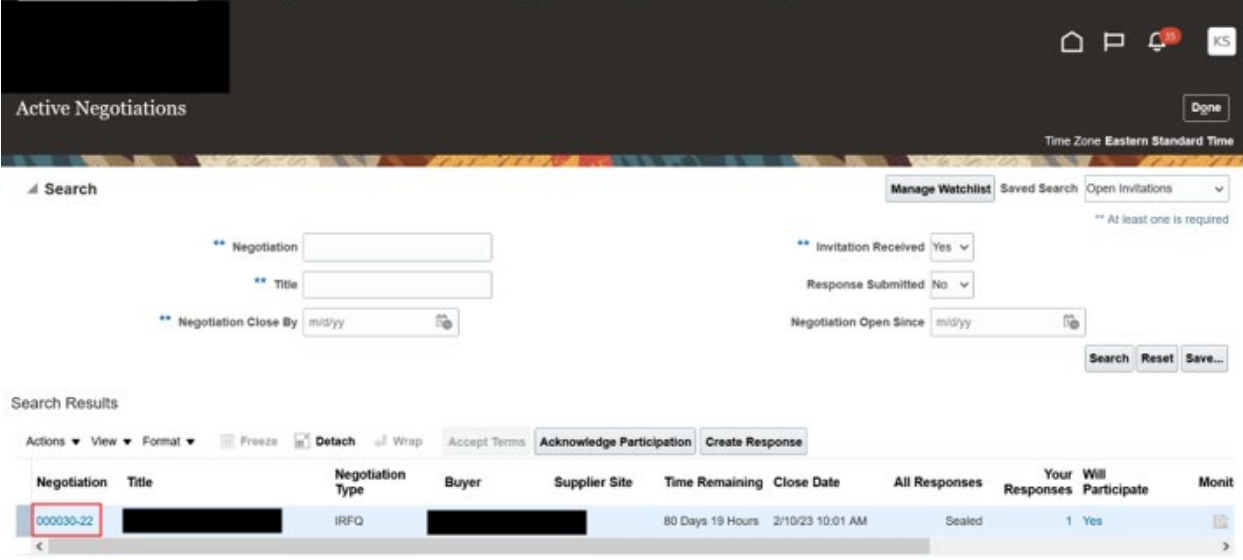


To view the RFx as a PDF, click on View PDF.

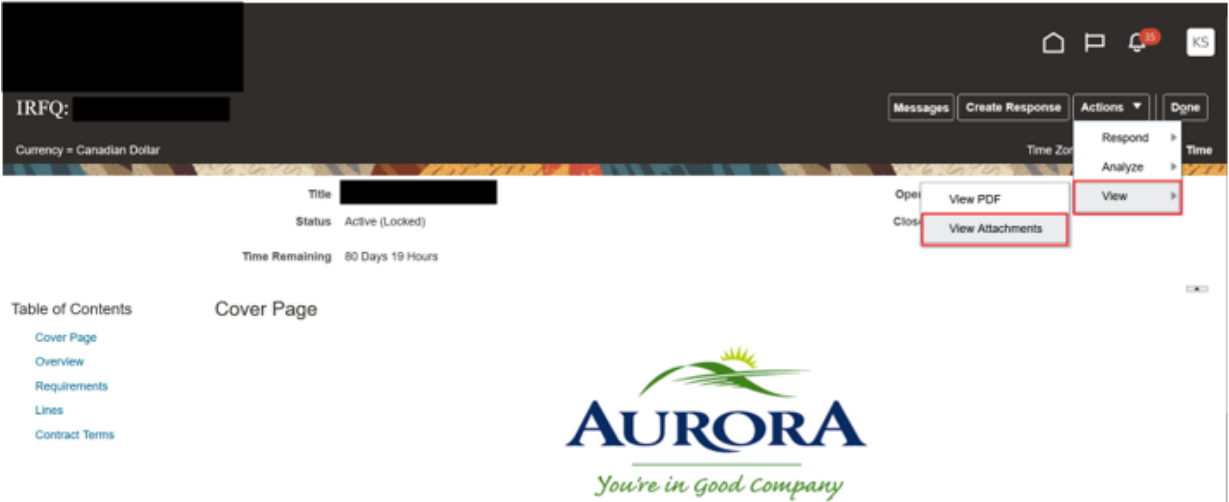


3.2 View Attachments Associated with the Negotiation/Response

Select the negotiation you wish to view, by clicking on the Negotiation number.

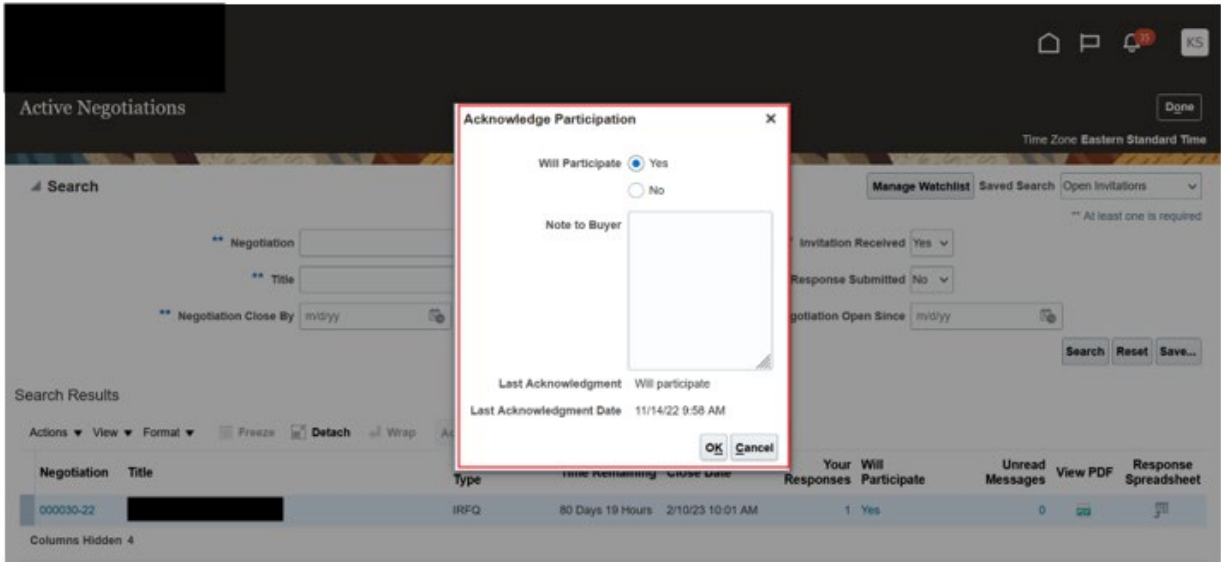


Select Actions, View, then View Attachments.



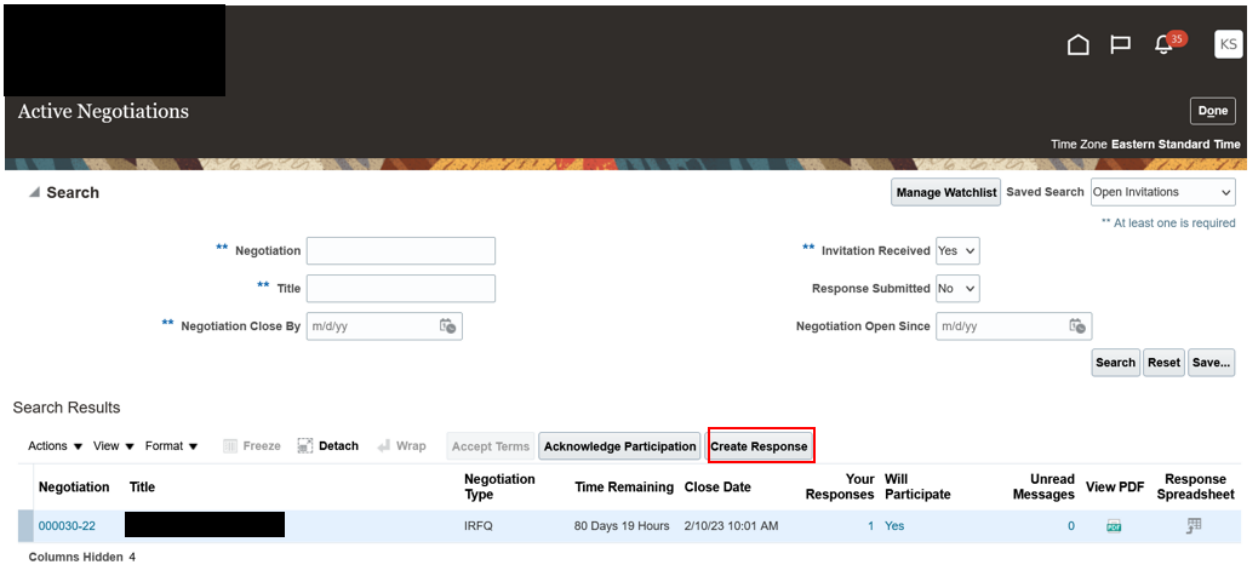
3.3 Acknowledge Participation in Negotiations

If you are going to participate in a bid, you can acknowledge participation. This will allow the Town of Aurora to know if they should expect your bid.



3.4 Create Response in Negotiations

Select create a response to participate in a bid.



3.5 Respond by Spreadsheet

Select Response Spreadsheet to respond by spreadsheet.

Active Negotiations

Time Zone: Eastern Standard Time

Search

Manage Watchlist Saved Search Open Invitations

** At least one is required

** Negotiation

** Title

** Negotiation Close By midyy

** Invitation Received Yes

Response Submitted No

Negotiation Open Since midyy

Search Reset Save...

Search Results

Actions View Format Freeze Detach Wrap Accept Terms Acknowledge Participation Create Response

Negotiation	Title	Negotiation Type	Time Remaining	Close Date	Your Responses	Will Participate	Unread Messages	View PDF	Response Spreadsheet
000030-22		IRFQ	80 Days 19 Hours	2/10/23 10:01 AM	1	Yes	0		

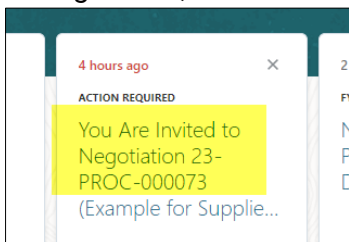
Columns Hidden 4

3.6 Bid Submission for Mid-Value

3.6.1 Navigating to the Bid

From the Home area of the Oracle portal, click on the invitation notification.

Important note: The Oracle platform refers to Bids as a “Negotiation”. This is a Bid and is not to be negotiated, that terminology is the default Oracle terminology.



This window will pop up. From this window you can view the Bid PDF, view the bid, or create a new response by clicking on the various areas indicated below:

Invited to Negotiation 23-PROC-000073 (Example for Suppliers - Mid Value Quote in Oracle)

Actions Accept Invitation Decline Invitation

Negotiation Invitation
Example for Suppliers - Mid Value Quote in Oracle
The Corporation of the Town of Aurora

From Charlene Waters
 IRFQ 23-PROC-000073
 Opens 7/20/23 8:59 AM
 Closes 8/31/23 10:00 AM

Supplier [REDACTED]
 Supplier Site MAIN
 Supplier Contact [REDACTED]
 Acknowledge By 7/23/23 8:59 AM

You are receiving this notification from company The Corporation of the Town of Aurora because you are identified as a potential supplier for our organization. We are requesting proposals based on the requirements found in the attached file.

Within this file you will also find detailed instructions including information such as submission procedures, time frames, and evaluation criteria. Your participation is optional, and your response will be electronically processed through our procurement application.

If you do not want to receive future notifications, or would like us to redirect this message to another person in your organization, write to us at this e-mail address: CWaters@aurora.ca.

Thank you,
 Charlene Waters

Assigned to M [REDACTED] 7/20/23 9:02 AM
 Submitted by [REDACTED] 7/20/23 9:02 AM
 23-PROC-000073_SUPPLIER.pdf PDF version of Document and quote requirements

View Negotiation Click to navigate to the bid information and requirements
 Create New Response Click to start responding to quote
 Acknowledge Participation

Click on the 'View Negotiation' button. You will be brought into the bid where you can review the specifications, requirements, and terms. This is not where you will submit a response, this area is to first review the Bid.

3.6.2 Review the Bid

Once you click into the bid, it lands on the "Cover Page". On the left side you will see a Table of Contents with links. Clicking on these links brings you to each different area of the Bid.

IRFQ: 23-PROC-000073
 Currency = Canadian Dollar

Title
 Status
 Time Remaining

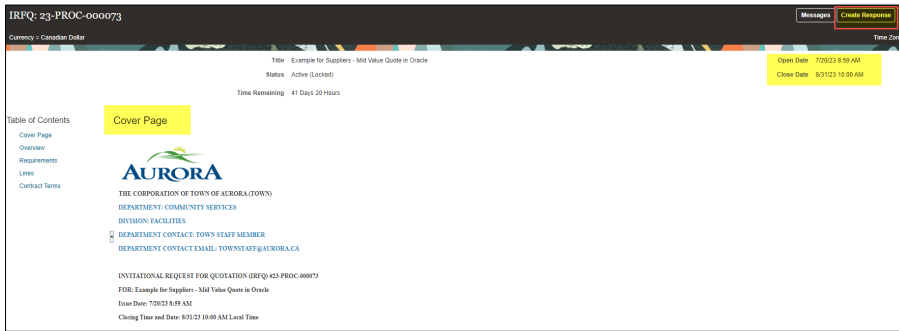
Table of Contents
 Cover Page
 Overview
 Requirements
 Lines
 Contract Terms

Cover Page

AURORA
 THE CORPORATION OF TOWN OF AURORA (TOWN)
 DEPARTMENT: COMMUNITY SERVICES

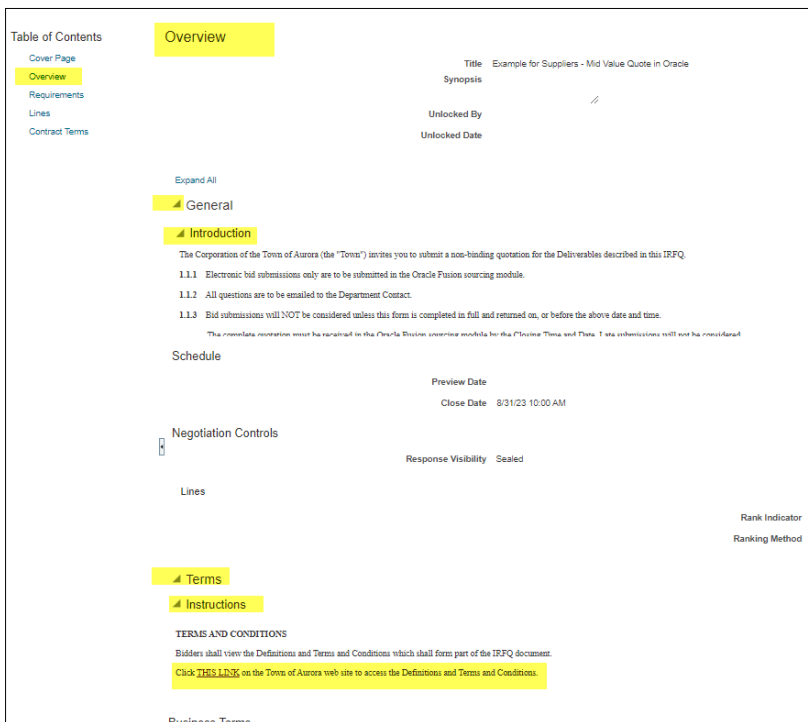
3.6.2.1 Cover Page

The cover page has titles and details about the bid including open and closing dates:



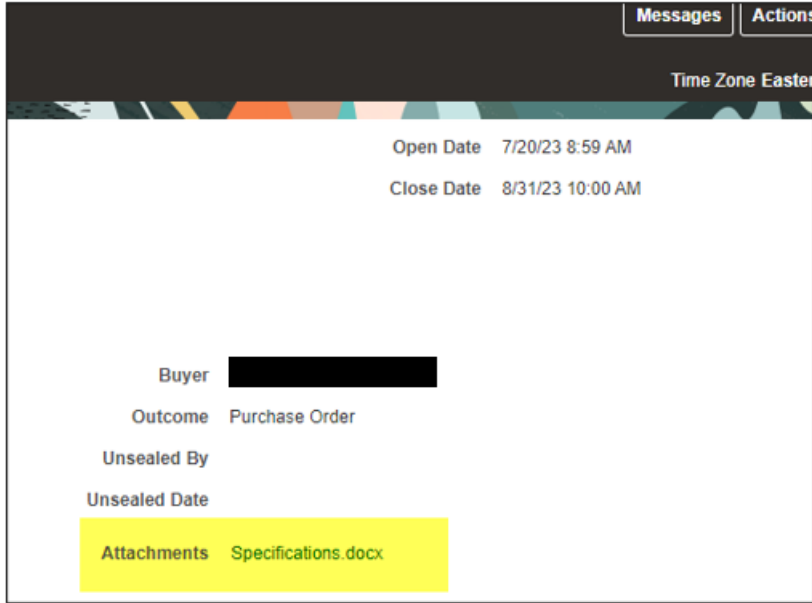
3.6.2.2 Overview Area

The Overview page is where you can view all the Bid instructions, terms and conditions by clicking on the various areas and arrows:



3.6.2.3 Review the Specifications/Attachments

The right side of the Overview page has an "Attachments" area. This is where specifications and drawings have been uploaded for your review. Click on the document filename to download it. Bidders are responsible for reviewing all attachments and must acknowledge that they have reviewed when they create their response:



3.6.2.4 Review the Requirements

The requirements section has all the submission information that will be required from all Bidders for the Bid. This includes acknowledgements (such as conflict of interest or acknowledgement that the specifications have been reviewed) and information requested (for example references).

Title Example for Suppliers - Mid Value Quote in Oracle
 Status Active (Locked)
 Time Remaining 41 Days 20 Hours

Table of Contents

- Cover Page
- Overview
- Requirements**
- Lines
- Contract Terms

Requirements

▲ Instructions
 Bidders are to respond to all the Requirements listed below.

Summary

View ▼ Format ▼ Freeze Detach Wrap

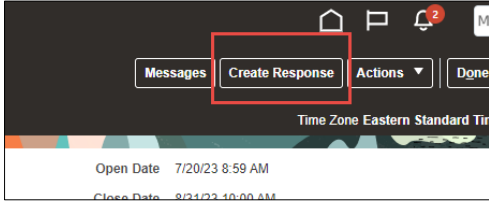
Requirement	Requirement Text
▲ 1. SPECIFICATIONS	
1. Specifications	The Bidder acknowledges and agrees that all attached Specifications, drawings and/or documents have been received and reviewed.
▲ 2. ALTERNATES	
1. Alternate Products	When the Town has specified a brand name, if any Bidder would like to quote an equivalent alternate, at the Bidder's absolute discretion, whether a proposed alternate product is acceptable. If the Town deems, at its absolute discretion, that an alternate product is acceptable, the Bidder shall provide the following information: For Bidders that ARE proposing alternate products: 1. Download Table A provided 2. Complete the table with proposed products 3. Select option a - "We ARE submitting Alternate products and have attached Table A - Alternate Products" in the response area 4. Upload the completed Table A in the area provided. For Bidders that are NOT proposing alternate products: 1. Select option a - "We will NOT be submitting Alternate Products" in the response area
▲ 3. REFERENCES	
1. REFERENCES	Bidders are to list three (3) references of completed projects of similar size and scope to the work or services described in the Request for Proposal. NOTE: The information provided with respect to the Bidder's experience with similar work, services or goods, shall, at the Bidder's discretion, be limited to the information requested in the Request for Proposal. Instructions for Providing References: 1. Download Table "B" provided 2. Complete the table 3. Select Option a. Upload area for Completed Table "B" in the response area 4. Upload the completed Table "B" in the area provided.
▲ 4. COMMUNICATION WITH COMPETITORS	

3.6.2.5 Review Lines Section

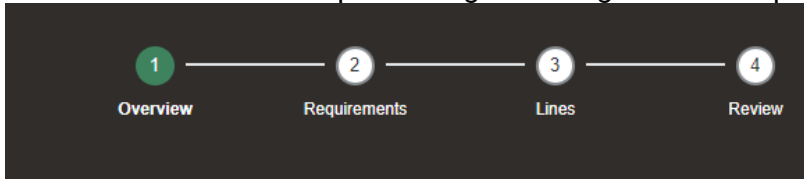
This section is a preview of the pricing line that will be in the response area.

3.7 Creating A Response/Submitting Bid

Once you have reviewed the specifications and requirements and are ready to submit a response, click the “Create Response” button in the top right corner of the page:

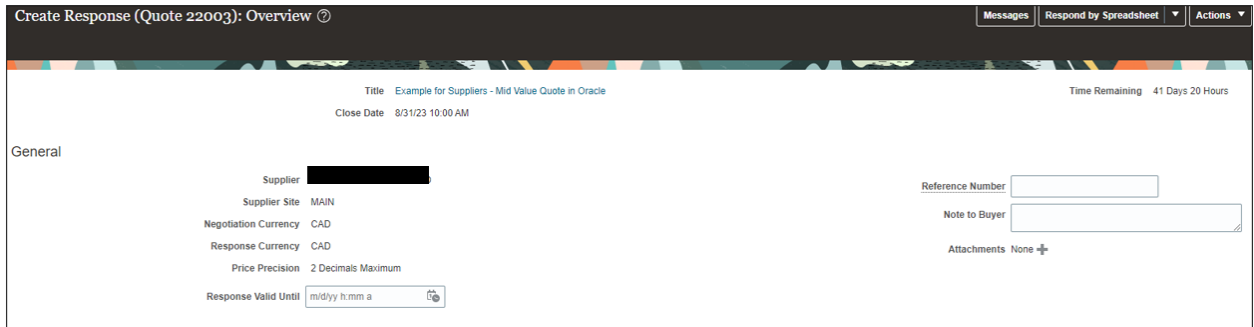


This will open the response area. At the top of this area there are train stops. Bidders are to click on each of these train stops to navigate through the bid response.



3.7.1 Overview Train Stop

The Town does not require any information to be submitted in the Create Response Overview Area. All fields are to be left blank. Please move on to the next train stop – “Requirements”.

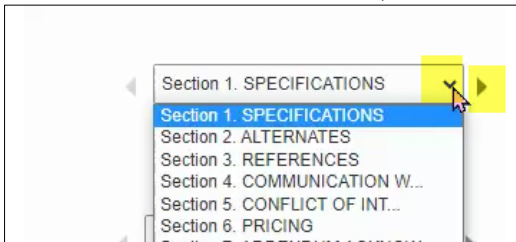


3.7.2 Requirements Train Stop

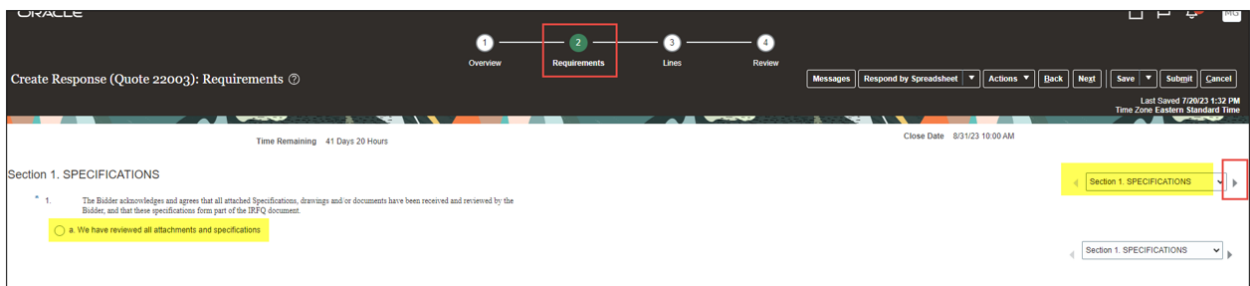
The Requirements area contains several steps which include acknowledgements or uploading information.

When you are in the Requirements area, you will see a navigation button on the right side of the screen where you can navigate to each response requirement either by clicking the arrows or choosing from the drop-down menu.

Drop down menu, and arrow (highlighted):



3.2.1 Specifications: Respond by clicking the circle to acknowledge the required action.

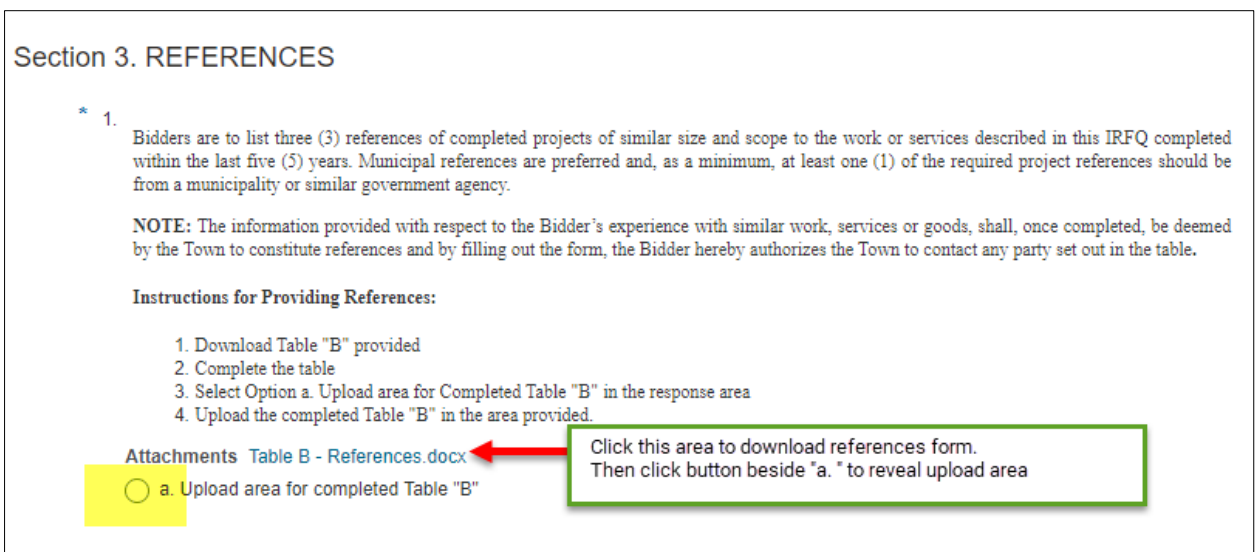


3.2.2 References: The References section is an example of a requirement that bidders must action by downloading, completing, and uploading a form.

In the "Attachments" area, you will see the form required. Click on the link to download it.

Complete the form and save on your desktop.

Click the circle beside the "a." After clicking this circle an upload area will appear:



Upload the completed references form by clicking the "+" button:

Section 3. REFERENCES

- * 1. Bidders are to list three (3) references of completed projects of similar size within the last five (5) years. Municipal references are preferred and, as a minimum, one reference should be from a municipality or similar government agency.

NOTE: The information provided with respect to the Bidder's experience will be used by the Town to constitute references and by filling out the form, the Bidder hereby certifies that the information is true and correct.

Instructions for Providing References:

1. Download Table "B" provided
2. Complete the table
3. Select Option a. Upload area for Completed Table "B" in the response
4. Upload the completed Table "B" in the attachments area

Attachments [Table B - References.docx](#)

a. Upload area for completed Table "B"

* Response Attachments None +

After clicking the "+" button, an upload area appears. Click "+" button to upload completed form.

An Attachments upload window appears.

Click the "+" button and ensure the "Category" is "From Supplier"

Click "choose file" to upload document.

Populate the "Description" field with a short description.

Click "OK".

Type	Category	* File Name or URL	Title	Description	Attached By
File	From Supplier	Choose File No file chosen			MENICK GAMMA

3.2.3 Alternates (If Applicable): Some Bids will have an 'Alternates' section. Review the instructions. In the "Attachments" area, you will see the form required.

If you are submitting alternate products, click on the link to download it. Complete the form and save on your desktop.

Click the circle beside the "a." After clicking this circle an upload area will appear. Click the "+" button.

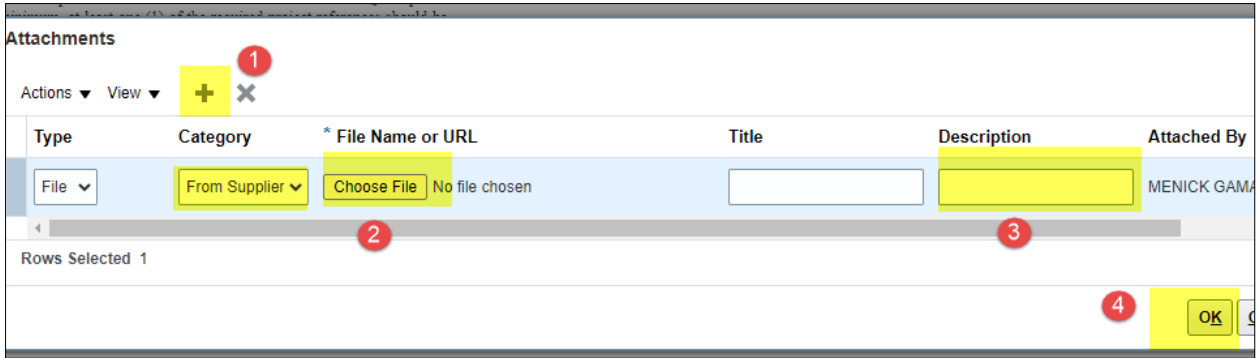
a. We ARE submitting Alternate products and have attached Table A - Alternate Products

* Response Attachments None +

b. We will NOT be submitting Alternate Products

An Attachments upload window appears.

1. Click the "+" button and ensure the "Category" is "From Supplier"
2. Click "choose file" to upload document.
3. Populate the "Description" field with a short description.
4. Click "OK".



If you are not submitting alternates, choose the “We will NOT be submitting Alternates” option.

3.2.4 Communication with Competitors: Read instructions. If there is a disclosure required, populate the field with this information. If there are no disclosures, respond “none”.

3.2.5 Conflict of Interest: Read instructions and respond by selection the appropriate option.

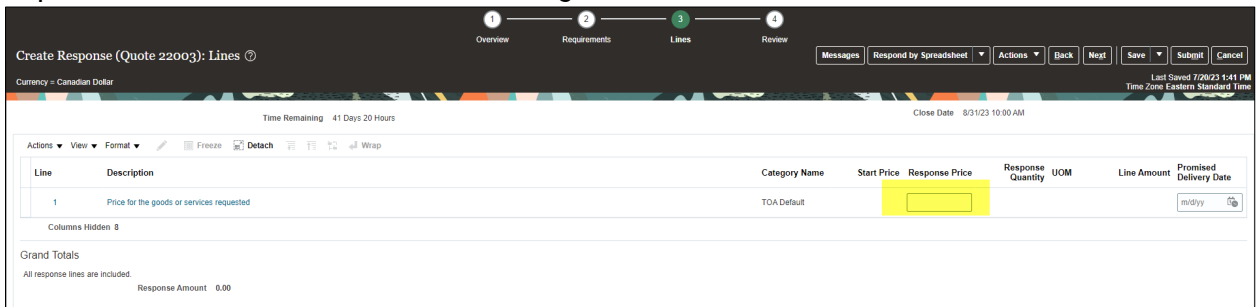
3.2.6 Pricing: Respond by clicking the circle to acknowledge the required action.

3.2.7 Addendum Acknowledgement: Respond by clicking the circle to acknowledge the required action.

3.7.3 Lines Train Stop (Pricing)

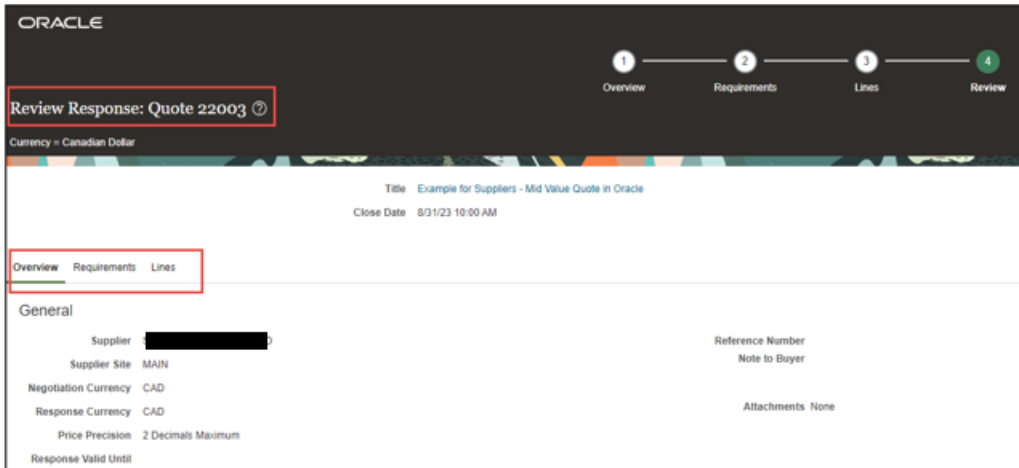
The “Lines” train stop is where all fees/pricing are to be entered. In the “Response Price” field, enter your bid price.

The “Promised Delivery Date” area will automatically populate with the Town of Aurora delivery requirements date. Bidders are not to change this date.



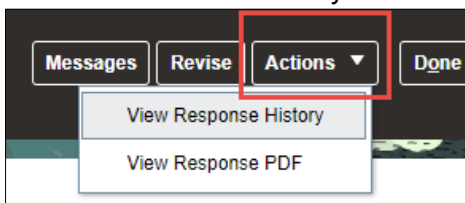
3.7.4 Review Train Stop

The Review train stop allows bidders to check their response if needed, before submitting. Navigate to the various areas by clicking on the “Overview/Requirements/Lines” tabs indicated below.



VIEW PDF:

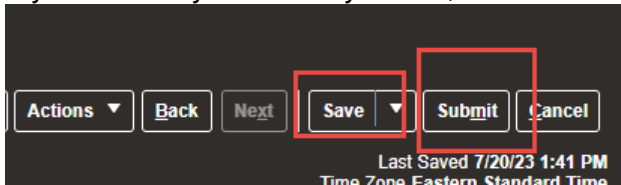
To view a PDF version of your submission, click “Actions>View Response PDF.”



3.7.5 Submit or Save

You can save your bid as you are working through it by clicking the ‘save’ button in the top right corner. If you need to save your bid to come back later, click the drop-down arrow beside the save button and click “save and close”.

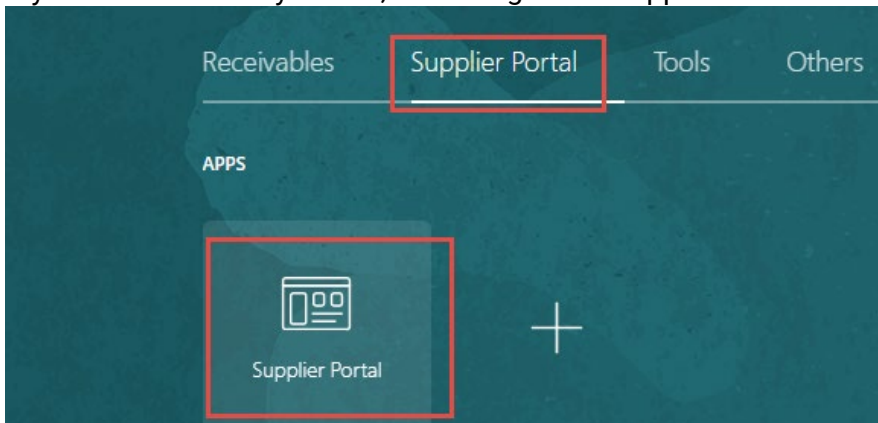
If you are ready to submit your bid, click “Submit”.



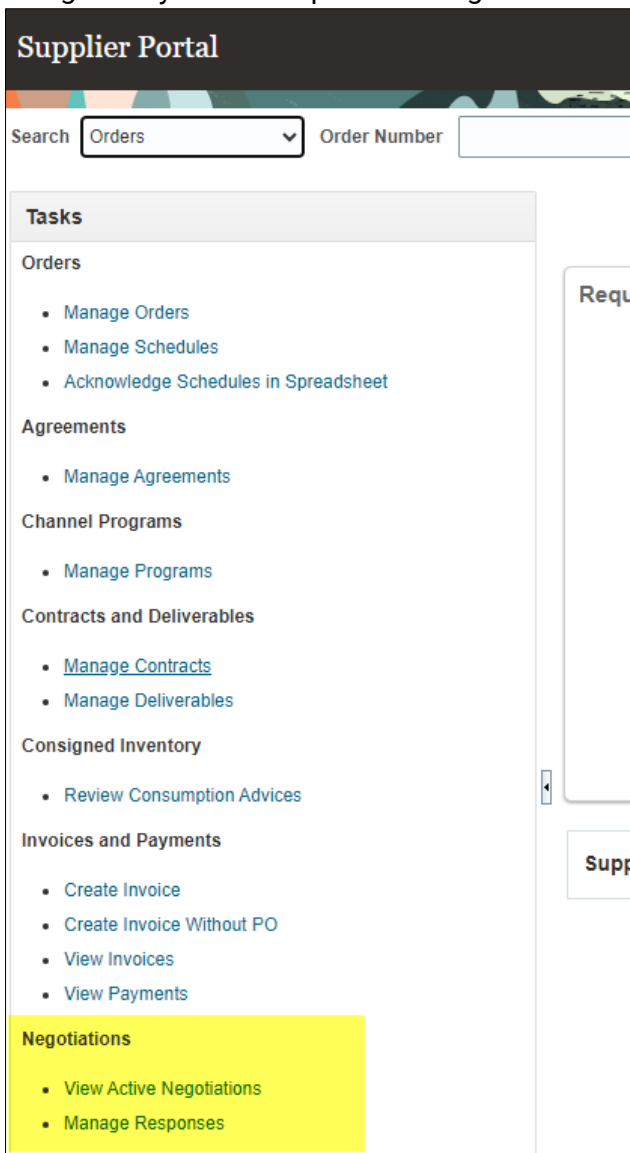
3.7.6 Revise Bid

***Only possible before closing date/time

If you need to revise your Bid, first navigate to “supplier Portal” area in Oracle after logging in:



Navigate to your bid response through either “View Active Negotiations” or “Manage Responses”:



In this example, “View Active Negotiations” was clicked. You will see all your negotiations/bids. Click on the response number beside the bid:

Search Results

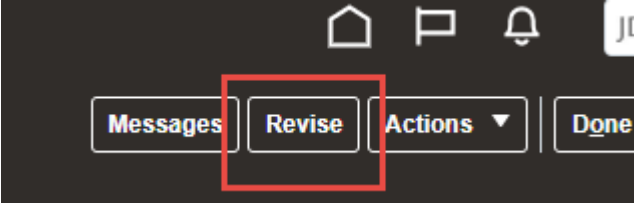
Revising a draft response automatically locks it.

Actions ▾ View ▾ Format ▾ Freeze Detach Wrap

Response	Response Status	Negotiation	Negotiation Title
22002	Active	23-PROC-000073	Example for Supp

Columns Hidden 8

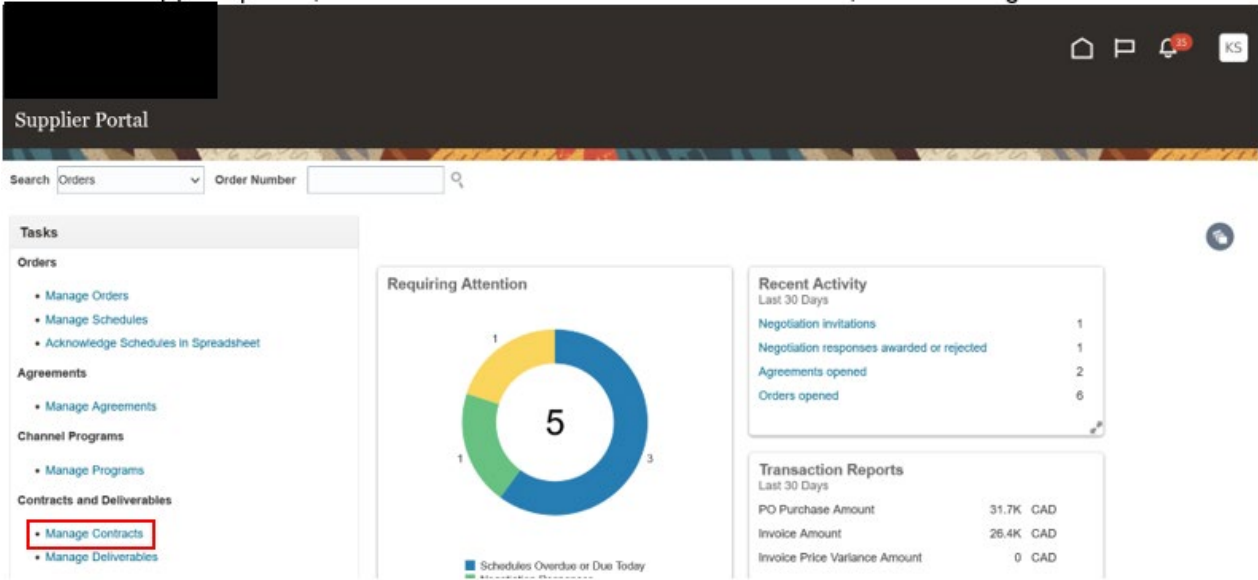
Once you are in, click the ‘Revise” button on the top right corner of the screen:



You can now edit your response.
**Important note, you must submit again for you to have a response submitted before the closing date and time. If you do not, no bid will have been submitted.

3.8 View Contracts

From the Supplier portal, under the Contracts and deliverables tab, click Manage Contracts.



Click Search to see a listing of contracts.

Manage Contracts Done

Search

Number: Starts with Amount: Equals

Name: Contains Agreed Amount: Equals

Status: Equals Type:

Payment Terms: Source Document Number: Starts with

Search

Search Results

Actions

Number	Name	Status	Type	Start Date	End Date	Preview	Contract Documents
19	RFQ Vehicles	Active	Contract	11/10/22	11/11/23		
33	Contract for Ma...	Active	Blanket Agree...	11/17/22			
21	BPA for cars	Active	Blanket Agree...	11/10/22	11/10/24		
29	Template 6	Closed	Contract	11/14/22	11/15/22		

Columns Hidden: 6

3.9 View PDF version of Contracts

Click on Preview to view a PDF of the contract.

Manage Contracts Done

Search

Number: Starts with Amount: Equals

Name: Contains Agreed Amount: Equals

Status: Equals Type:

Payment Terms: Source Document Number: Starts with

Search

Search Results

Actions

Number	Name	Status	Type	Start Date	End Date	Preview	Contract Documents
19	RFQ Vehicles	Active	Contract	11/10/22	11/11/23		
33	Contract for Ma...	Active	Blanket Agree...	11/17/22			
21	BPA for cars	Active	Blanket Agree...	11/10/22	11/10/24		
29	Template 6	Closed	Contract	11/14/22	11/15/22		

Columns Hidden: 6

3.10 Manage Deliverables

From the Supplier portal, under the Contracts and deliverables tab, click Manage Deliverables.

Supplier Portal

Search Orders Order Number

Tasks

- Orders
 - Manage Orders
 - Manage Schedules
 - Acknowledge Schedules in Spreadsheet
- Agreements
 - Manage Agreements
- Channel Programs
 - Manage Programs
- Contracts and Deliverables
 - Manage Contracts
 - Manage Deliverables**

Requiring Attention

Recent Activity Last 30 Days

Negotiation invitations	1
Negotiation responses awarded or rejected	1
Agreements opened	2
Orders opened	6

Transaction Reports Last 30 Days

PO Purchase Amount	31.7K CAD
Invoice Amount	26.4K CAD
Invoice Price Variance Amount	0 CAD

Manage Deliverables

Search

Deliverable Name Starts with Status Operator

Status Equals

Due Date Equals m/d/yy

Type Equals

Document Type Equals

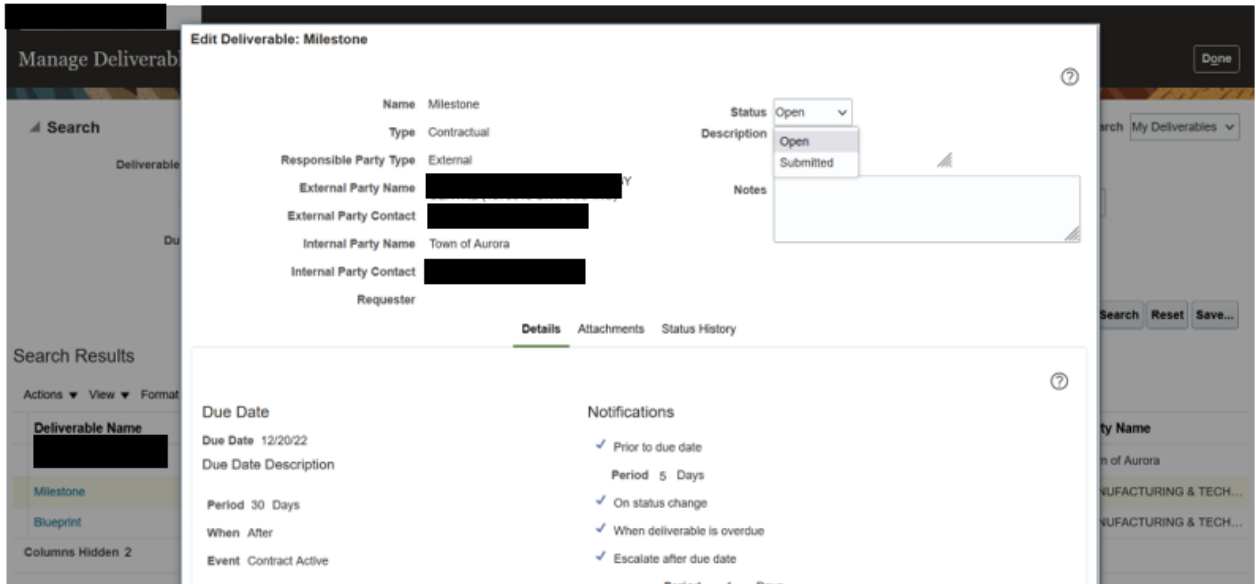
Document Number Starts with

Search Results

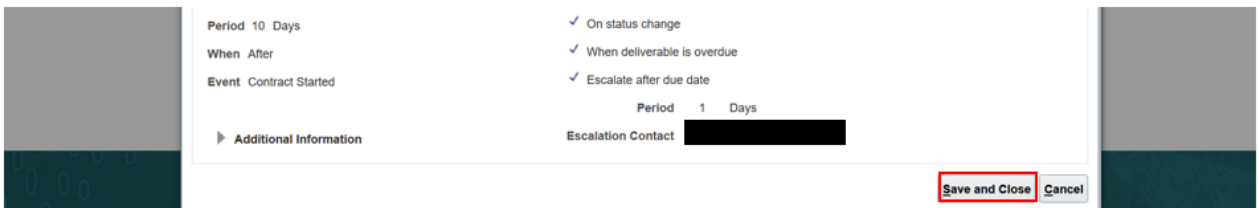
Deliverable Name	Status	Deliverable Type	Document Type	Document Number	Due Date	Party Name
Milestone	Open	Contractual	Supplier Contract	19	11/14/22	
	Open	Contractual	Supplier Contract	33	12/20/22	

https://fa-ewkl-dev1-saasprod1.fa.ocs.oraclecloud.com/fscmUI/faces/FuseWelcome?_adf.ctrl-state=1bj94gdnrw_5&find=false;256;_afLoop=6965615325816723#

Change status from open to submitted.

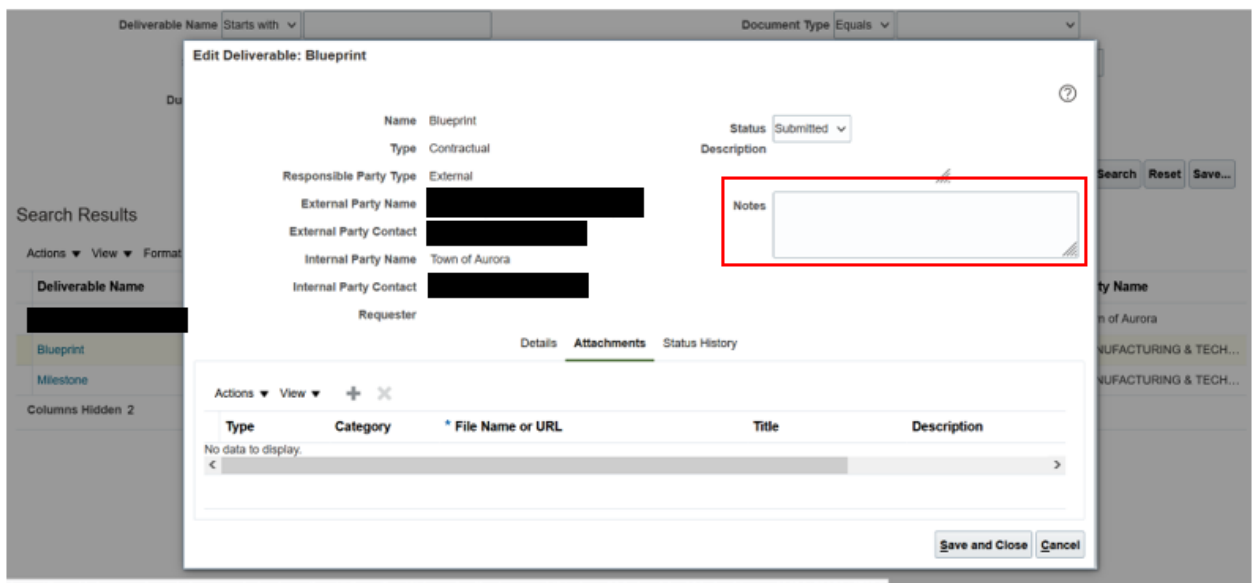


Click save and close.



3.11 Edit Deliverables and Add Notes/Attachments

Click into the Notes area to add notes.



Go to the attachment section and click the plus button.
Click save and close once completed.

Deliverable Name Starts with Document Type Equals

Edit Deliverable: Blueprint

Name: Blueprint Status: Submitted

Type: Contractual Description:

Responsible Party Type: External

External Party Name: [REDACTED]

External Party Contact: [REDACTED]

Internal Party Name: Town of Aurora

Internal Party Contact: [REDACTED]

Requester:

Notes:

Details Attachments Status History

Actions View + X

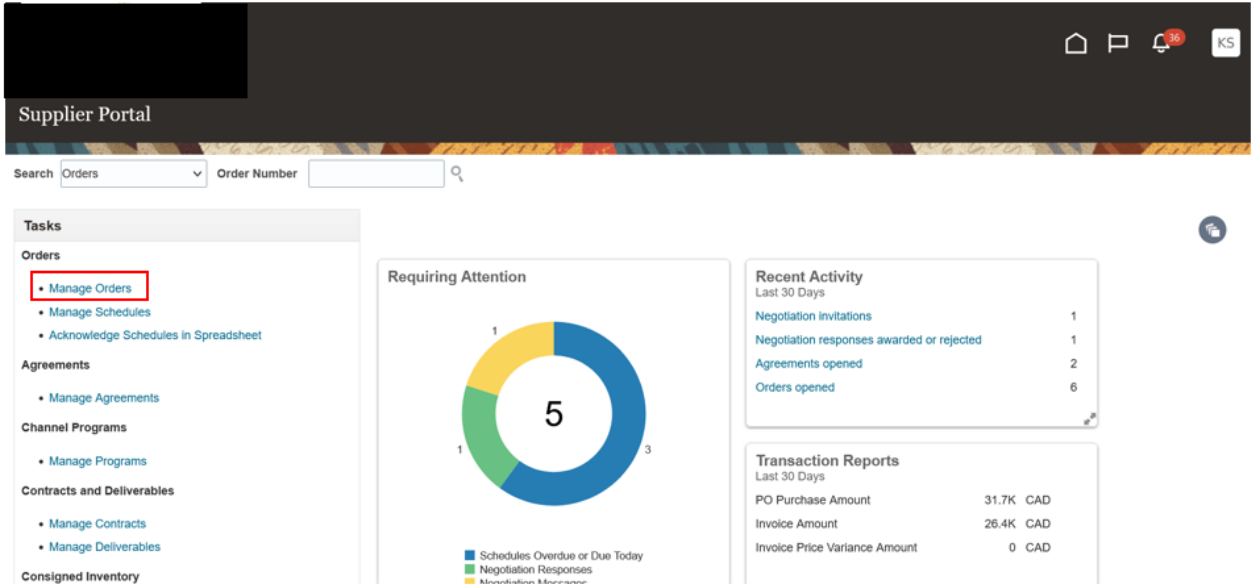
Type	Category	* File Name or URL	Title	Description
No data to display.				

Save and Close Cancel

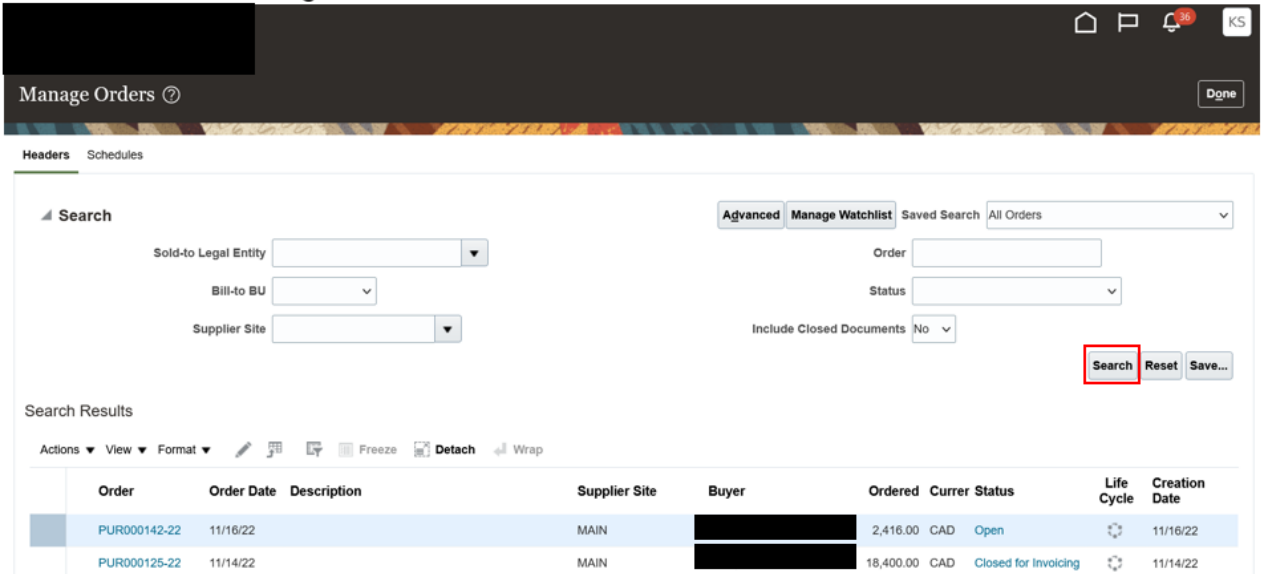
4.0 Manage Orders

4.1 Acknowledge and Accept a PO / BPA

From the Supplier portal, under the Orders tab, click Manage Orders.



Click Search for a listing on the Purchase Orders.



Click on the Purchase Order line and it will be highlighted in blue. Click on Actions drop down and choose Acknowledge.

Headers Schedules

Search

Sold-to Legal Entity

Bill-to BU

Supplier Site

Advanced Manage Watchlist Saved Search All Orders

Order

Status

Include Closed Documents No

Search Reset Save...

Search Results

Actions View Format Freeze Detach Wrap

Order Date	Description	Supplier Site	Buyer	Ordered	Currer	Status	Life Cycle	Creation Date
11/16/22		MAIN		2,416.00	CAD	Open		11/16/22
11/14/22		MAIN		18,400.00	CAD	Closed for Invoicing		11/14/22
11/14/22		MAIN		7,950.00	CAD	Open		11/14/22
10/26/22		MAIN		1,400.00	CAD	Open		10/26/22
PUR000059-22	10/25/22	MAIN		1,500.00	CAD	Open		10/25/22
PUR000021-22	10/22/22	MAIN		200.00	CAD	Closed for Invoicing		10/22/22

4.2 Acknowledge Purchase Order Schedules Using Spreadsheet

From the Supplier portal, under the Orders tab, click Acknowledge Schedules in Spreadsheet.
 Note: Excel Add-in ADFI is needed

Supplier Portal

Search Orders Order Number

Tasks

- Orders
 - Manage Orders
 - Manage Schedules
 - Acknowledge Schedules in Spreadsheet**
- Agreements
 - Manage Agreements
- Channel Programs
 - Manage Programs
- Contracts and Deliverables
 - Manage Contracts
 - Manage Deliverables
- Consigned Inventory

Requiring Attention

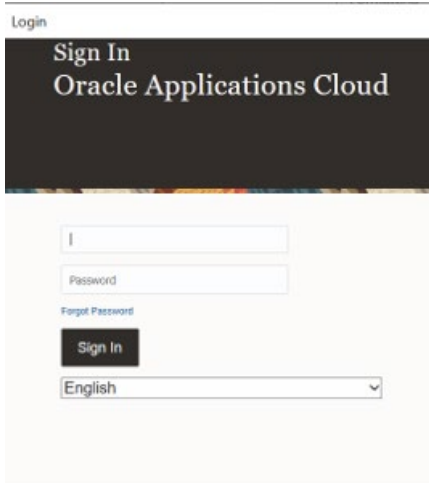
Recent Activity

Negotiation invitations	1
Negotiation responses awarded or rejected	1
Agreements opened	2
Orders opened	6

Transaction Reports

PO Purchase Amount	31.7K CAD
Invoice Amount	26.4K CAD
Invoice Price Variance Amount	0 CAD

The Spreadsheet will be downloaded to your computer.
 Open the spreadsheet and log in.



Read Instructions, enter Details and select 'Upload'.

