MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

Navigating the Supplier Portal

User Guide for Registered Suppliers

1 May 2024

Contents

Glossary

Weka Term	Description
Contract	A legally binding agreement between the Ministry and a supplier, specifying the terms and conditions for the provision of goods or services.
Closed Tender	A competitive procurement process limited to a pre-selected group of known suppliers from a government or internal panel.
Negotiation	In the system, it refers to the RFx/sourcing process.
Open Tender	An advertisement inviting all suppliers to participate in the tender process. All open tenders will be advertised on GETS (Government Electronic Tenders Service) where suppliers will be directed to submit their responses in the system.
Purchase Order (PO)	A formal document issued by the buyer to the supplier, confirming the buyer's intention to purchase specific goods or services.
Tender Opportunity	Also known as a ‘contract opportunity, is an opportunity for suppliers to submit their bids or proposals in response to a specific request or invitation from a buyer. It allows suppliers to compete for a contract or project.
Supplier Portal	The module or platform that suppliers use to manage their procure-to-pay interactions with the Ministry, including accessing tender opportunities, submitting responses, managing contracts, as well as viewing purchase orders, receipts, invoices, and payments.
Weka	The name of the Oracle system used by the Ministry for procurement and supplier management processes.

About this guide

Overview

Welcome to the Ministry of Social Development's (the Ministry) user guide for navigating the Supplier Portal. This guide will help you effectively use the Supplier Portal to access various features and perform important tasks.

The Ministry’s Supplier Portal offers the following functionalities:

- Viewing contracts and agreements that you may have.
- Updating catalogue lists, maintaining item pricing, and descriptions.
- Accessing and reviewing purchase orders issued to you.
- Checking the status of invoices you have submitted for payment.
- Viewing and accessing tenders that the Ministry has in the market.

If you encounter any difficulties or have any questions, please do not hesitate to contact NAC_Suppliers@msd.govt.nz. The support team will be happy to assist you.

Icons used in this guide

The user guide may use the following icons:

Further information

References to additional sources of information for further details.

Tip

Provides a helpful piece of information or suggestion.

Important point

Highlights important information or areas that require caution.

Section Completed

Indicates section is complete

1. How to access the supplier portal after you have registered

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>

Check Your Email

When you are set up via a supplier registration or have requested access to the Ministry’s supplier portal, you will receive an email.

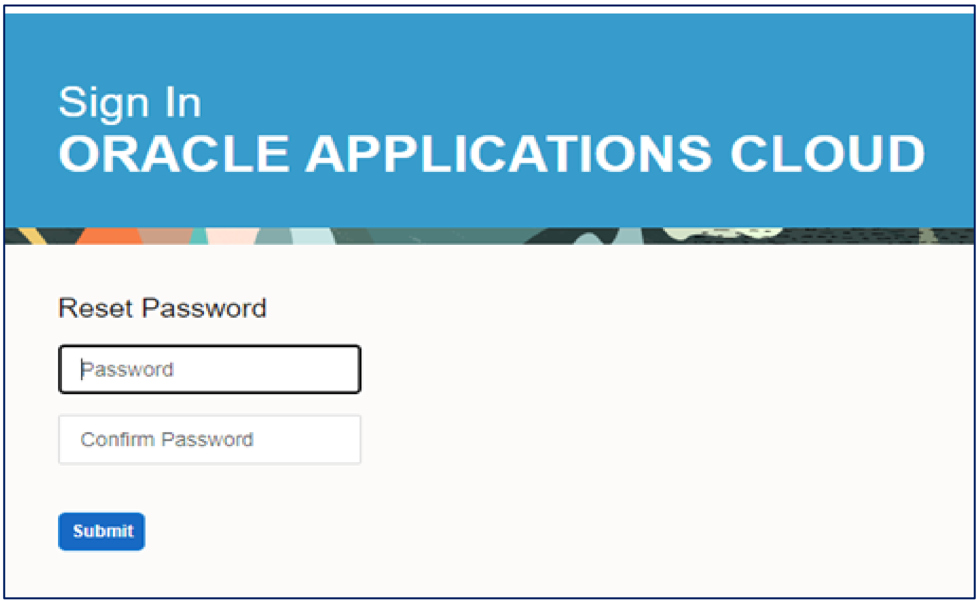
The email will be sent from "erzm.fa.sender@workflow.mail.ap1.cloud.oracle.com" and have the subject line "**Ministry of Social Development Supplier Portal – Welcome E-Mail**".

The email will contain instructions on how to create your password.

</td></tr>
<tr><td>2.</td><td>

Reset Your Password

Click on the first HTTP link provided in the email. This link will direct you to a password reset page. Enter your desired password in the designated field, and then click **Submit** to proceed.



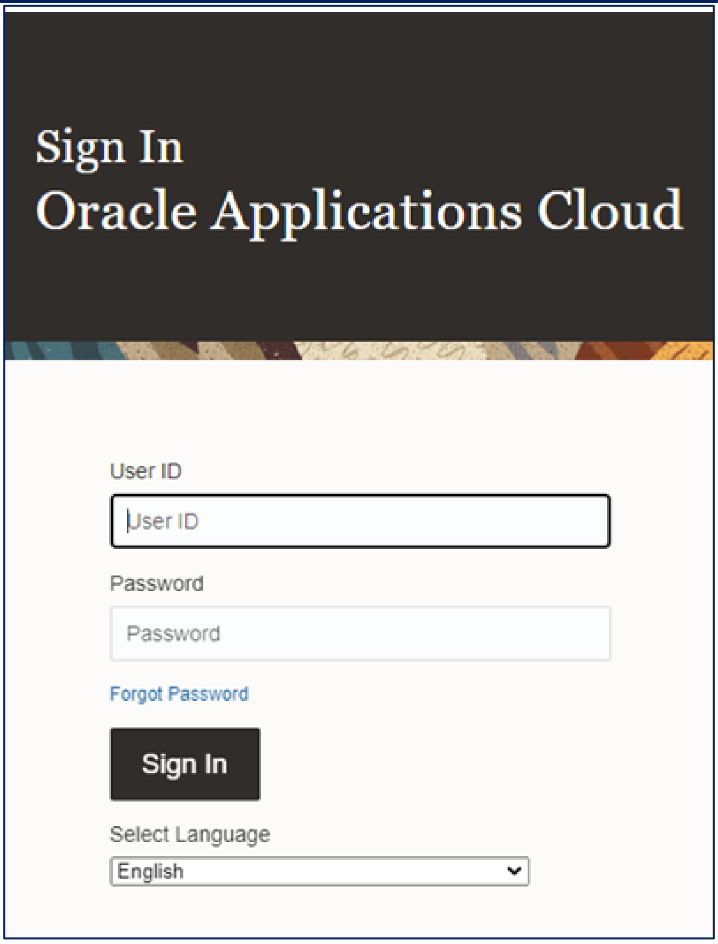
</td></tr>
<tr><td>3.</td><td>

Sign into the supplier portal

Once you have successfully reset your password, you will be directed to the sign in homepage.

Enter the username provided to you in the original email, along with the password you used in the reset password step. Then, click the **Sign In** button.

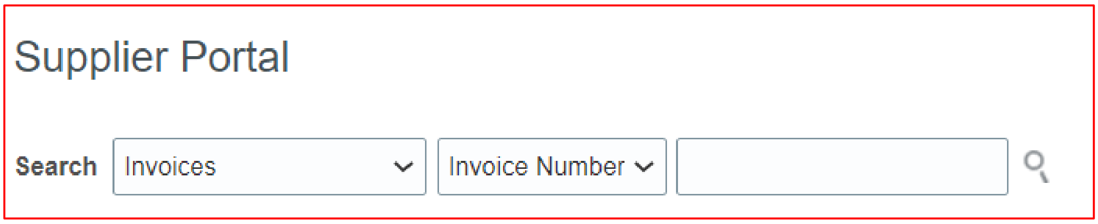
</td></tr>
</table>

	
	You have now successfully accessed the supplier portal.

2. Your tasks menu

The tasks menu gives supplier users the ability to access the tasks that may be required from time to time.

System steps

Step	Action
1.	Log into the application and click the **Supplier Portal** tile. Refer [section 1](#) for log in steps.
2.	The available actions are under the **Tasks** menu. 
	Alternatively, the **Search** dropdown box could be used to find the subject you are interested in Select what the area you would like to search then click the search. 

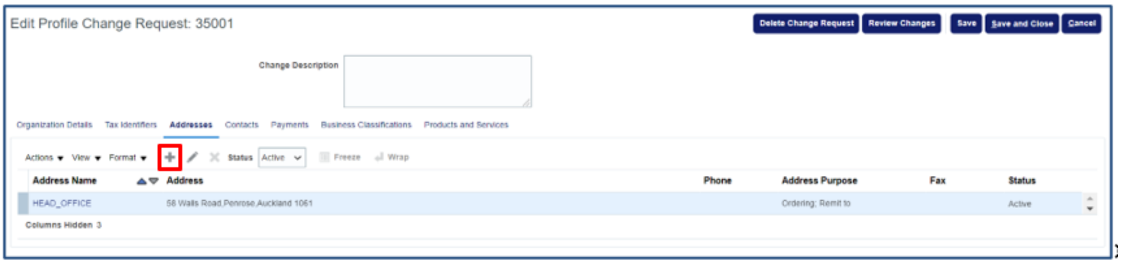
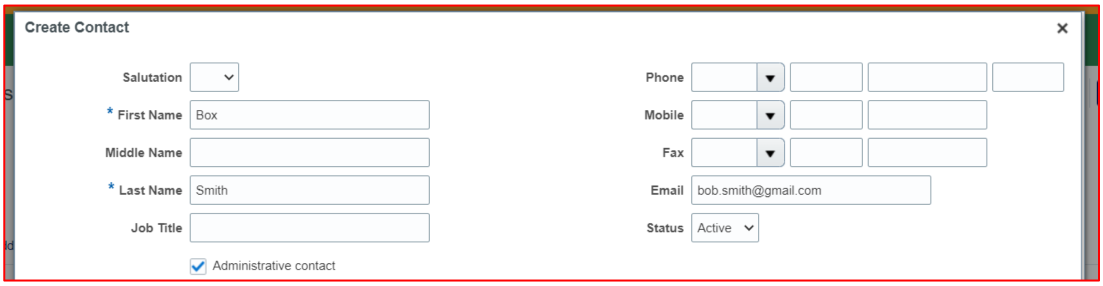
3. Roles and descriptions required for users and task

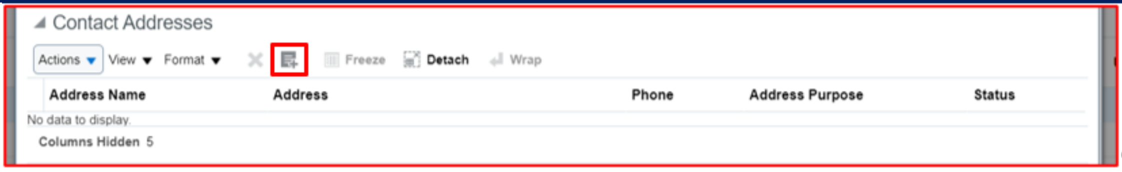
System steps

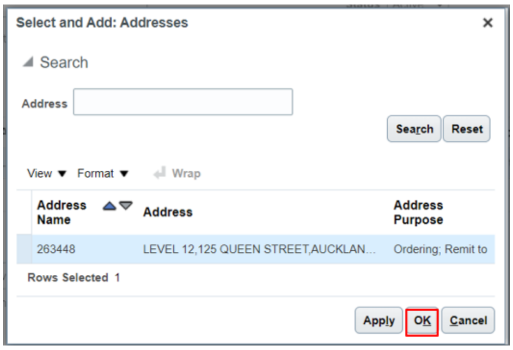
Follow these steps to update the Contacts tab.

There are five roles available that can be added or removed from each contact. The first four roles shown in the table below are added by default.

Role	Description
Supplier Accounts Receivable Specialist	Manages **invoices and payments** for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.
Supplier Bidder	Sales representative responsible for **responding to requests for quote, proposal, information, and auctions**.
Supplier Sales Representative	Manages **agreements and deliverables** for the supplier company. Primary tasks include acknowledging or requesting changes to agreements in addition to adding catalogue line items with customer specific pricing and terms. Updates contract deliverables that are assigned to the supplier party and updates progress on contract deliverables for which the supplier is responsible.
Supplier Self Service Administrator	Manages the **profile information** for the supplier company. Primary tasks include updating supplier profile information and requesting user accounts to grant employees access to the supplier application.
Supplier Customer Service Representative	Manages **inbound purchase orders and communicates shipment activities**. Primary tasks include tracking, acknowledging, or requesting changes to new orders. Communicates order schedules that are ready to be shipped by submitting advance shipment notices and monitors the receipt activities performed by the buying organisation.
MSD Self Service Procurement View Invoice	This role allows contacts to view supplier invoices from the portal

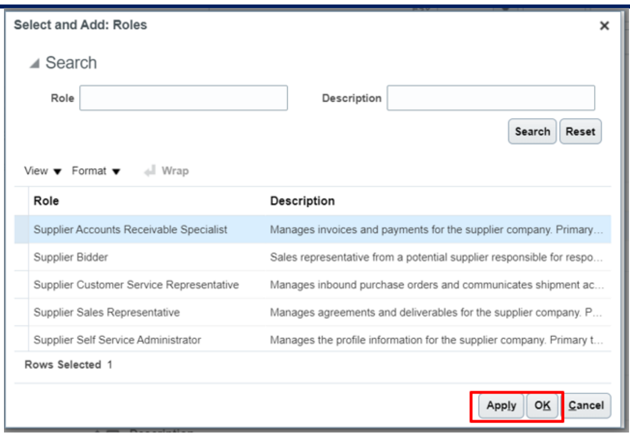
Step	Action
1.	Make sure you have completed Section 11(a) of the guide. Once done, click on **Edit** located in the top right corner, then click the **Contacts** tab. Result: A **Warning** pop-up box will appear. Click **Yes**. 
	To **add** a new contact, follow the steps below.
2.	Click the plus [**Create**] icon. 
3.	In the "**Contact Details**" section, complete the required fields denoted with an asterisk (*), such as **First Name, Last Name,** and **Email**. If this contact is an **administrative contact**, tick the box. You will also be required to complete the email field. 
4.	In the "**Contact Address**" section, associate an address with the contact by: • Clicking the plus [**Select and Add**] icon. Result: A **Select and Add**: Addresses pop-up box will appear. • Select the **Address** from the list and click **OK**.





5. In the "**User Account**" section, on the "**Roles**" tab, tick the "**Request user account**" box if you want this contact to have access to the Supplier Portal.

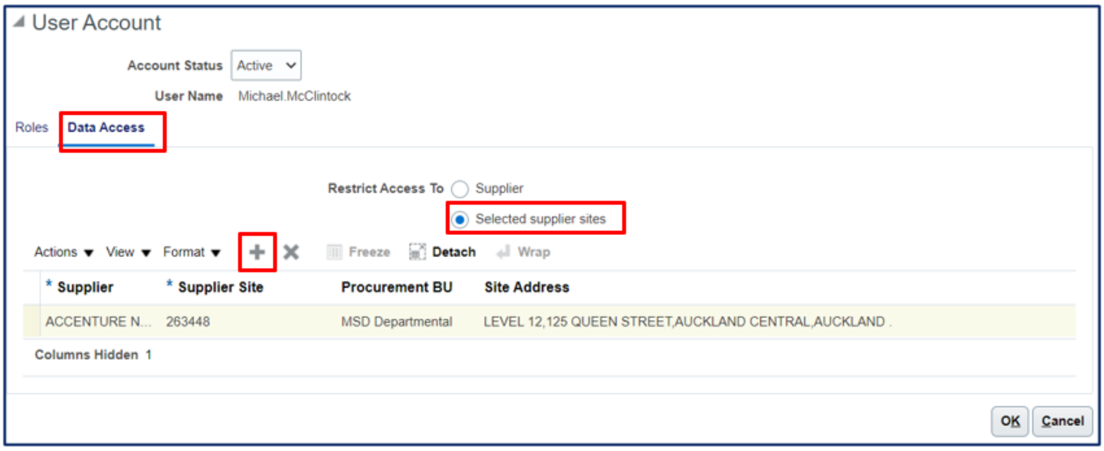
- To **add** specific roles, click the plus **Select and Add** icon. Select the role you wish to add, click **Apply**, and then **OK**.

<table>
<tr><td></td><td>


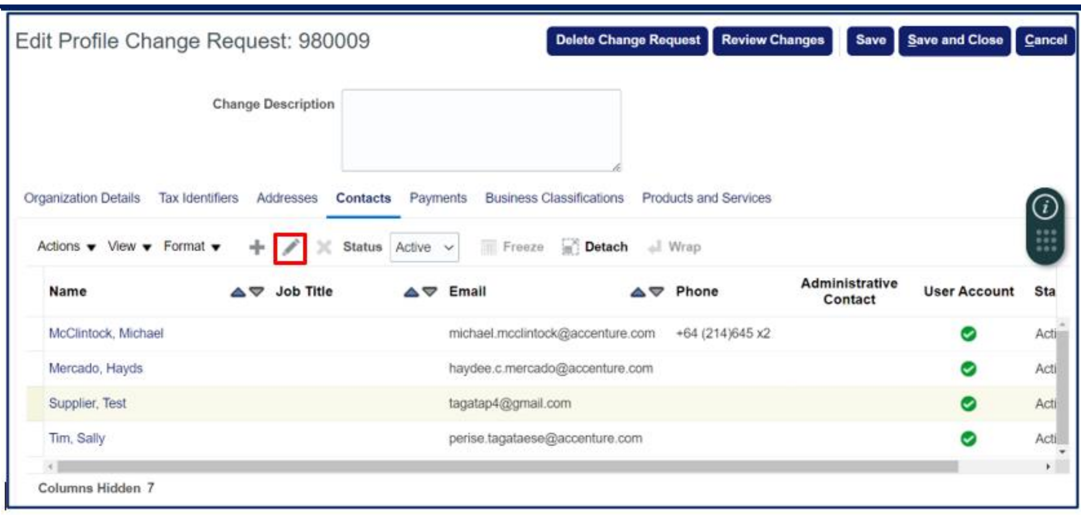
To **delete** a specific role, click the role, and then click the cross **Delete** icon.

</td></tr>
<tr><td>6.</td><td>
You can set a supplier contact to have access to either the whole supplier or just specific sites.

To give a contact access to particular site(s), click the "**Data Access**" tab. Tick the box "**Selected supplier sites**" under the **Restricted Access** field, and click the plus (Add) icon to select the Supplier Site(s) you want to give the contact access to. Once you have made the necessary updates, click **OK**.

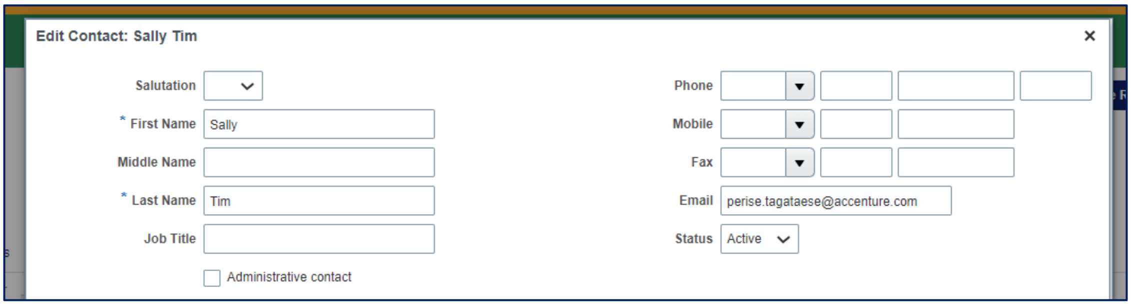


</td></tr>
<tr><td>7.</td><td>Click OK once you have finished adding a new contact.</td></tr>
<tr><td>8.</td><td>To edit an existing contact, highlight the contact you want to edit, then click the pencil Edit icon.</td></tr>
</table>

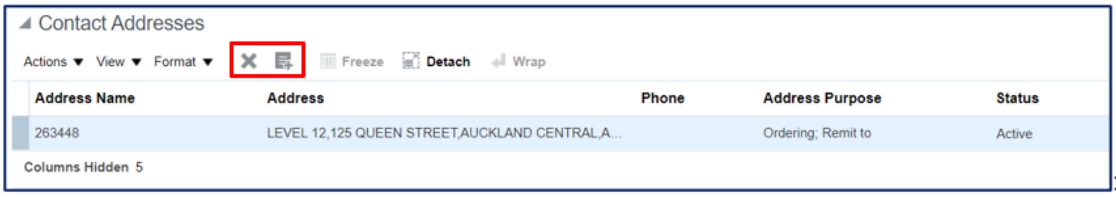


9. In the "**Contact"** section, update the required fields denoted with an asterisk, such as **First Name, Last Name,** and **Email**.

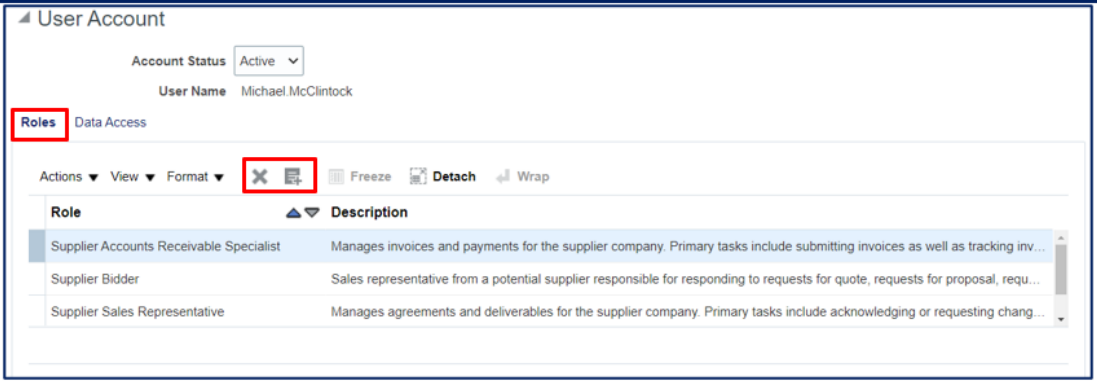
If this contact is an **administrative contact**, tick the box. An email is required for all administrative contacts.

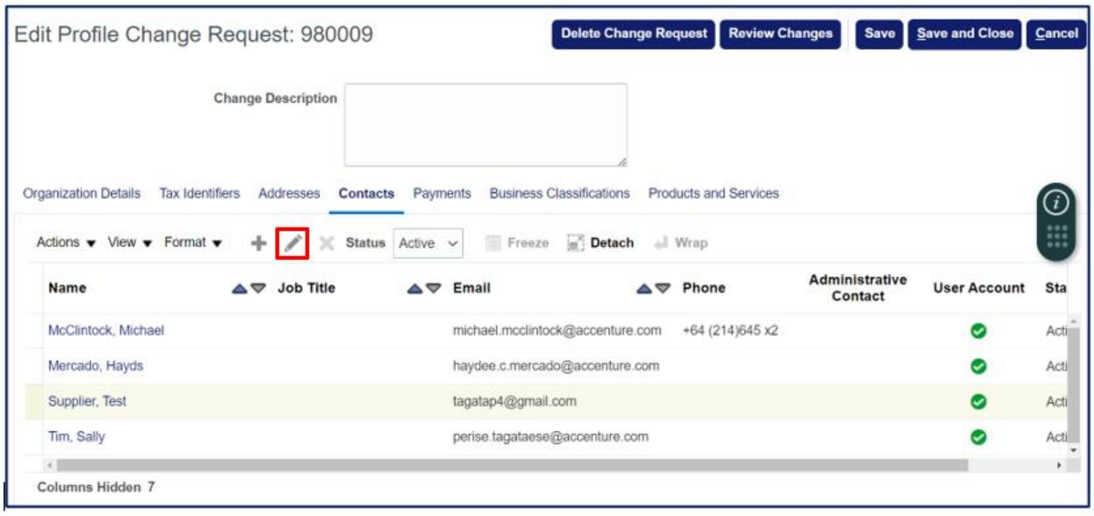
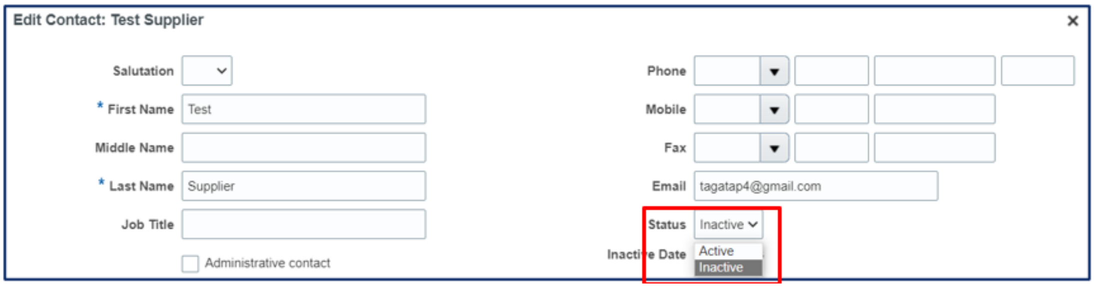


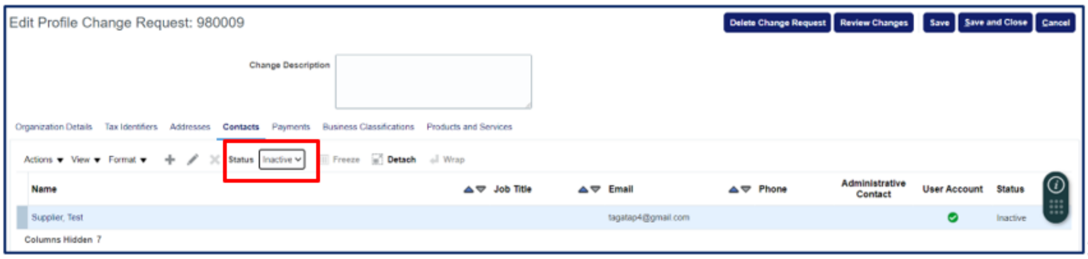
10. In the "**Contact Address"** section, you can update the address associated with the contact by either adding or deleting an address.



11. In the "**User Account**" section on the "**Roles**" tab, you can update the roles associated with the contact by either adding or deleting a role.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>12.</td><td>In the “User Account” section on the “Data Access” tab, you can change the access the contact has to particular sites.

To give access to specific sites, follow the same process as described in step 6.</td></tr>
<tr><td>13.</td><td>Once you have made the necessary updates, click OK.</td></tr>
<tr><td>14.</td><td>To inactivate a contact, highlight the contact you want to inactivate, then click the pencil Edit icon.

</td></tr>
<tr><td>15.</td><td>In the “Contact details” section, click “Inactive” from the status dropdown box.

</td></tr>
</table>

16.	The contact will be moved to the "**Inactive Contacts**" section by selecting "**Inactive**" from the status dropdown box on the Contacts tab. 
☑	This completes the section.

4. How to view receipts

This gives supplier users the ability to view purchase orders that have been receipted by the Ministry. Purchase orders may be fully receipted or partially receipted based on its scheduled payments. The supplier customer service representative role is required to complete the steps.

System steps

Step	Action
1.	Search for your receipt under the task menu or search facility.
2.	To view a specific receipt, click on the **Receipt** number hyperlink.
3.	The **Receipt** page opens, you have the option to click on **View Transaction History** located in the top-right corner. This will allow you to see any previous updates made to the purchase order associated with the receipt. 
4.	If you're done viewing the receipt and want to return to the previous page, click on **Done**.
☑	This completes the section.

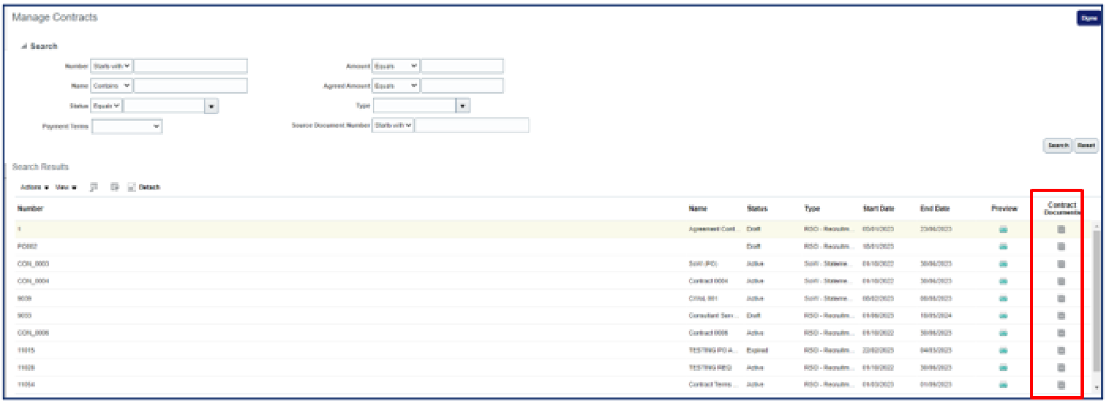
5. How to manage contracts

Overview

The Manage Contracts page allows suppliers with active contracts with the Ministry to access their contracts. The supplier customer service representative role is required to complete the steps.

See Section 8.1.4 for a full list of supplier roles and their description.

System steps

Step	Action
1.	Search for your contract under the sub menu item **Contracts and Deliverables** in the task menu or search facility.
2.	To view and download contract, click on the document icon in the contract documents column. 
	This completes the section.

6. How to view invoices

Overview

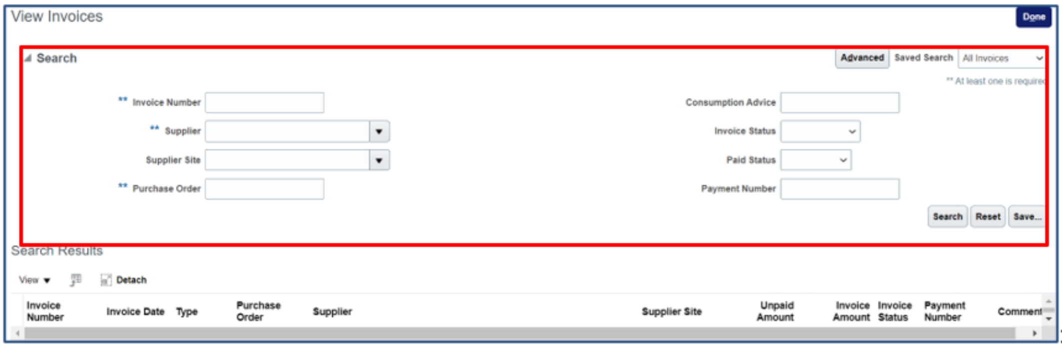
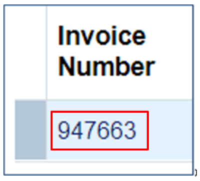
To view invoices associated with purchase orders in the supplier portal, follow the steps below. The required roles to complete the steps are:

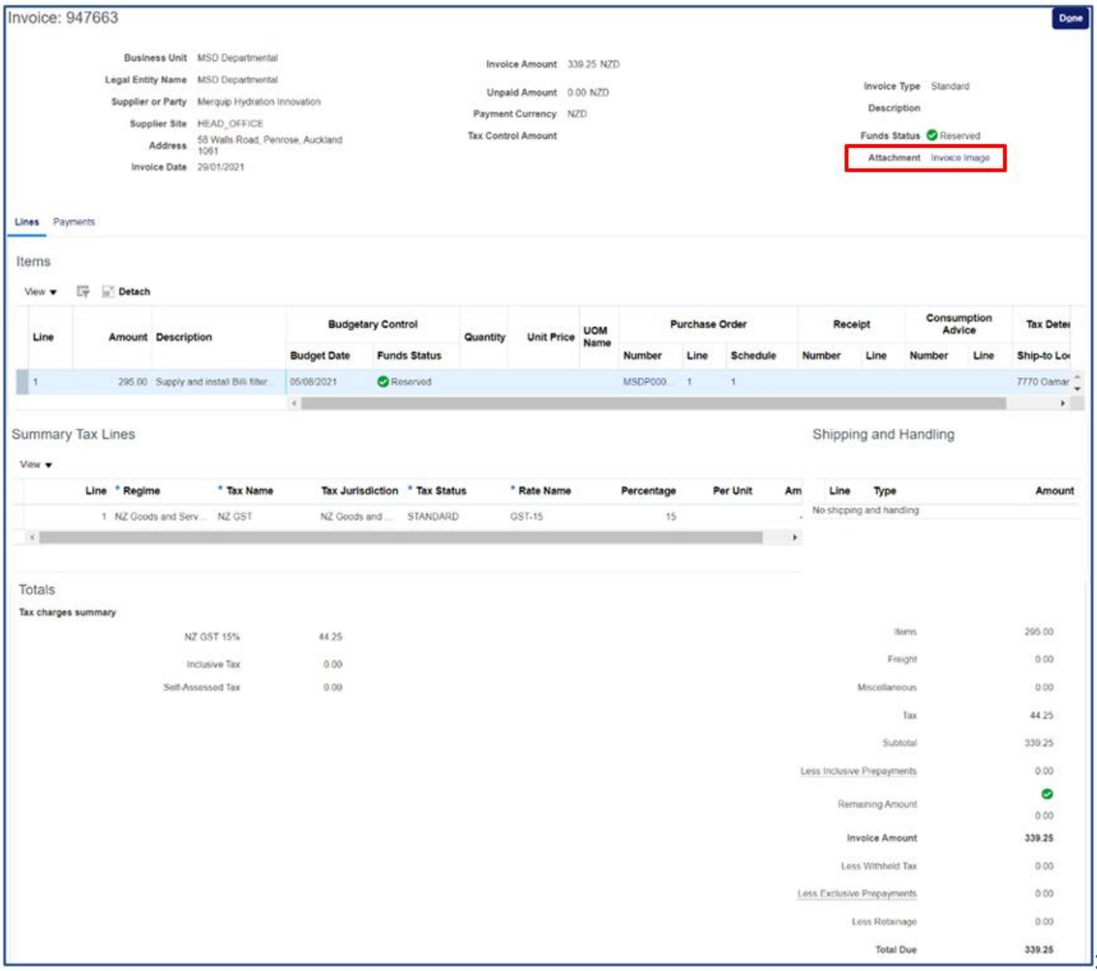
- Supplier Accounts Receivable
- MSD Self Service Procurement View Invoice

See Section 8.1.4 for a full list of supplier roles and their description.

System steps

Step	Action

1.	Search for your invoice under task menu or search facility.
2.	In the Search section, complete at least one of the asterisk-marked fields such as **Invoice Number, Supplier,** or **Purchase Order.** Then click on the **Search** button. Result: A list of invoices assoicated with a PO that match your search criteria will appear under the **Search Results** section. 
3.	To view a specific invoice, click on the **Invoice number.** This will open and display the details of the selected invoice in the invoice landing page. 
4.	If you want to view the invoice that was sent to the Ministry, navigate to the **Attachments** section and click on the hyperlink associated with the invoice. From there, click on the "**Invoice Image**" to view the invoice document.

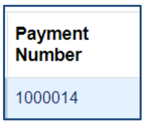
	
☑	This completes the section.

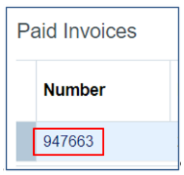
7. How to view payments

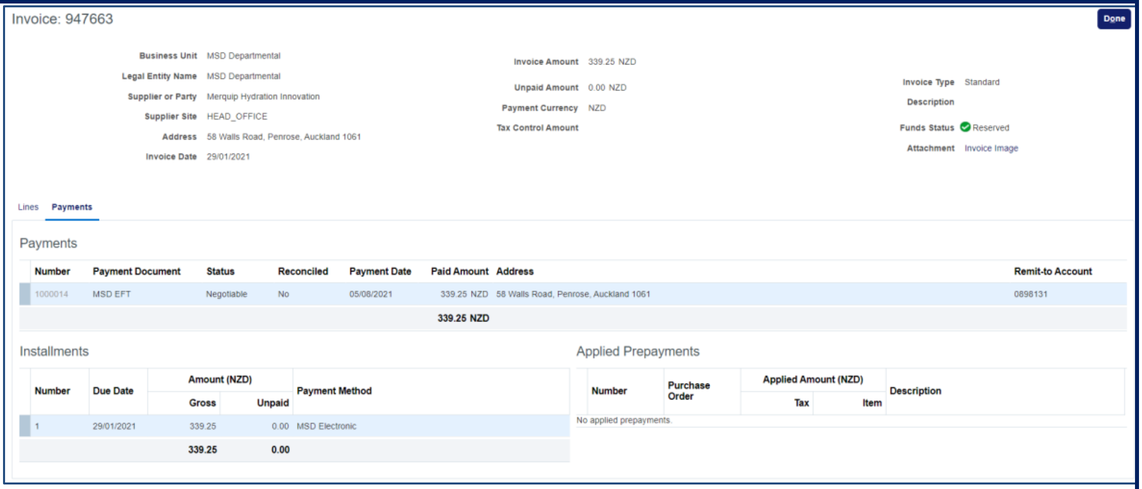
Overview

As a supplier, you can easily view your invoices that have been paid by the Ministry. This includes payments made through purchase orders or by directly clicking on individual invoices. The supplier customer service representative role is required to complete the steps.

System steps

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>a)</td><td>Under the Tasks menu, scroll to Invoices and Payments and click on View Payments.</td></tr>
<tr><td>b)</td><td>To view a specific payment, click on the Payment Number. This will open a landing page displaying the details of the selected payment.

</td></tr>
<tr><td>c)</td><td>On the Payment Number view, you can easily access key information such as the invoice number, invoice date, invoice type, purchase order, receipt, paid amount, invoice amount, invoice status, due date, and paid status.

</td></tr>
<tr><td>d)</td><td>Additionally, within the Payment Number view, you can click on the Invoice Number hyperlink to gain more detailed payment information for a specific invoice.

</td></tr>
</table>

	 To navigate back to the Payments landing page, simply click **Done**.
e)	In the Payment Number view, if you wish to review the **Purchase Order** associated with the payment, click on the Purchase Order hyperlink. 
☑	This completes the section.

8. How to view active negotiations

Overview

This section illustrates how to view active open and closed negotiations, also known as 'tender opportunities', with the Ministry. The supplier bidder and supplier sales representative roles are required to complete the steps.

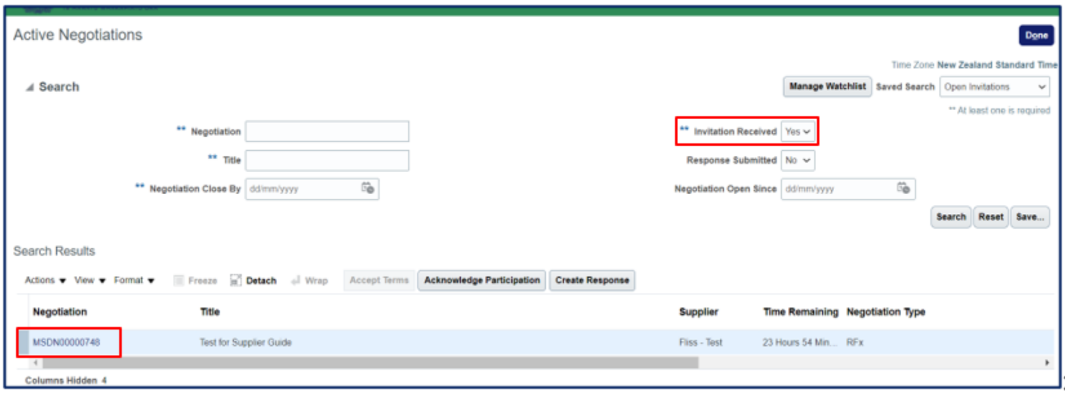
a) How to view an active Closed tender

System steps

Step	Action
1.	Under **Tasks**, scroll to **Negotiations** and click on **View Active Negotiations**.

<table>
<tr><td></td><td>Select the specific negotiation you want to access by clicking on the negotiation number hyperlink.

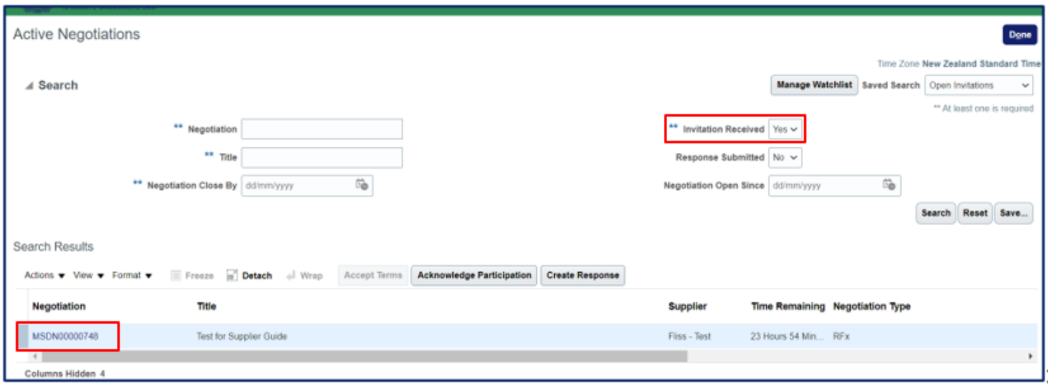
Make sure the field "Invitation Received" is showing "Yes" for the selected negotiation.


</td></tr>
<tr><td>☑</td><td>This completes the section.</td></tr>
</table>

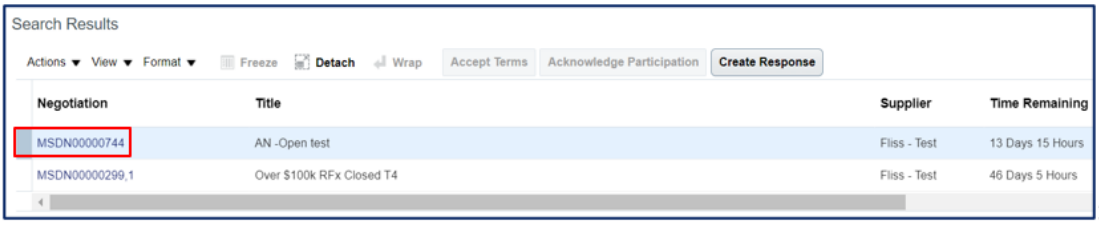
b) How to view an active Open tender

System steps

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Under Tasks, scroll to Negotiations and click on View Active Negotiations.


</td></tr>
<tr><td>2.</td><td>On the Active Negotiations landing page, select "No" in the Invitation Received dropdown box, and then click on the Search button.

The Search Results section will display a list of active open tenders.</td></tr>
</table>

	
3.	Review each open tender by clicking on the respective Negotiation hyperlink. 
☑	This completes the section.

9. How to manage responses

Overview

Previous responses to tenders can be viewed before and after the response date. The supplier bidder and supplier sales representative roles are required to complete the steps., you can follow the system steps outlined below.

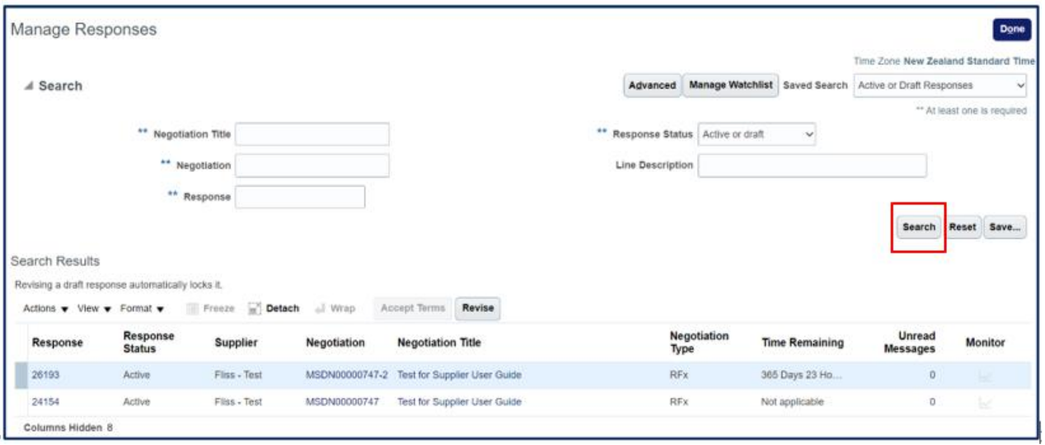
a) How to revise draft responses before the tender close date

System steps

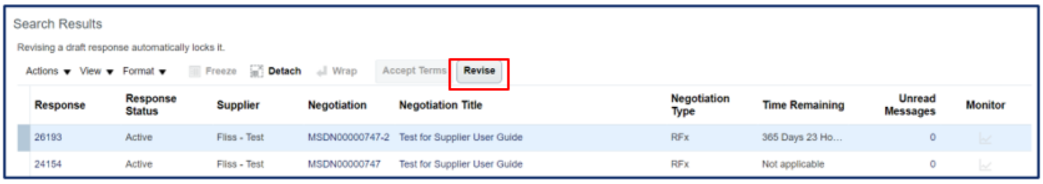
Step	Action
1.	Under **Tasks**, scroll to **Negotiations** and click on **Manage Responses**.

2. Complete the relevant search fields to narrow down your search for specific tenders you have responded to.

Once you have entered the relevant search criteria, click on the **Search** button.



3. Select the response line item to be updated, then click the **Revise** button.



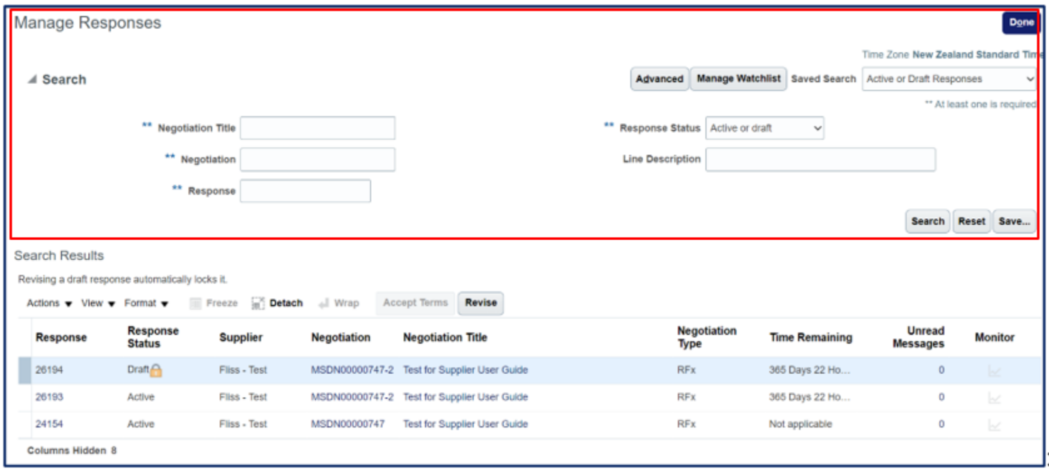
To revise a **draft** response, make sure that the **Response Status** is not locked.

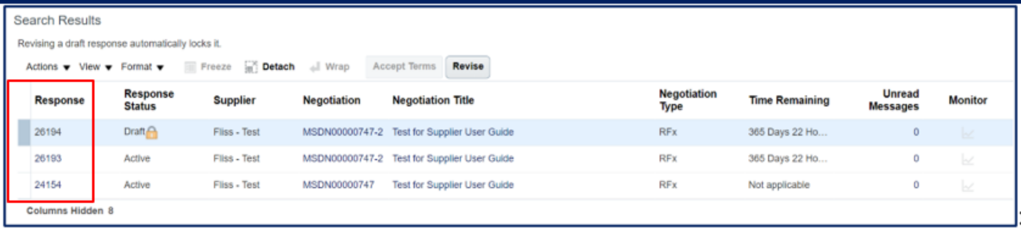
To unlock a response, select the response then click **Actions** then **Unlock Draft**.

	 
☑	This completes the section.

b) How to review responses

System steps

Step	Action
1.	Under **Tasks**, scroll to **Negotiations** and click on **Manage Responses**.
2.	Complete the relevant search fields to narrow down your search for specific tenders you have responded to. Once you have entered the relevant search criteria, click on the **Search** button. The system will display a list of negotiations based on your search criteria. 
4.	Review the Response and Response Status by clicking on the Response number hyperlink.

<table>
<tr><td></td><td>
</td></tr>
<tr><td></td><td>This completes the section.</td></tr>
</table>

10. How to manage questionnaires

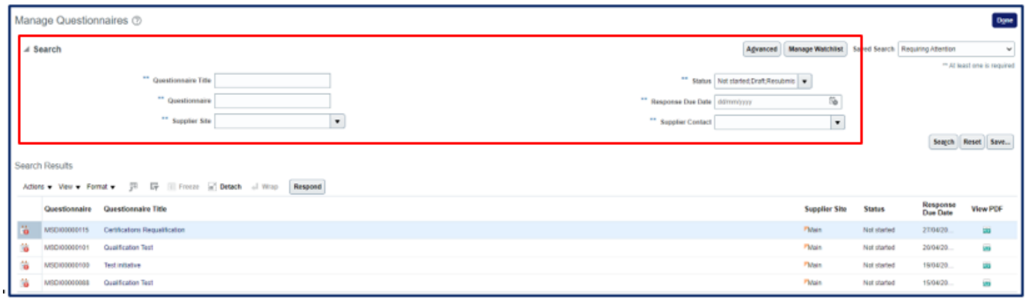
Overview

Supplier questionnaires can be viewed before and after the response date. The supplier sales representative role is required to complete the steps., you can follow the system steps outlined below.

a) How to view questionnaires

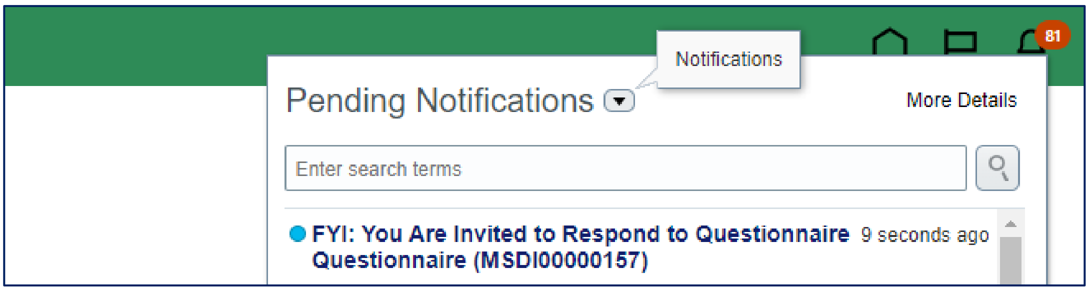
System steps

Step	Action
1.	Under **Tasks**, scroll to **Qualifications** and click on **Manage Questionnaires**. The **Manage Questionnaires** landing page will appear.
2.	Complete the relevant search fields to narrow down your search for specific tenders you have responded to. Once you have entered the relevant search criteria, click on the **Search** button. The system will display a list of questionnaires under **Search Results** based on your search criteria.

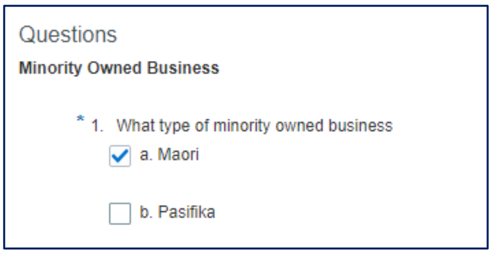
	
	This completes the section.

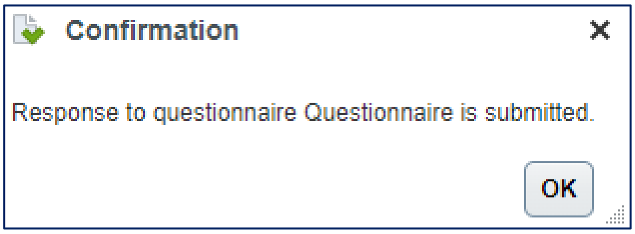
b) How to respond to a questionnaire

System steps

Step	Action
	When you are invited by the Ministry to submit a response to a questionnaire, the supplier contact selected by the Ministry will receive a FYI notification.
1.	View the Questionnaire Invitation by clicking on the notification 
2.	To respond to the questionnaire, under **Tasks**, scroll to **Qualifications** and click on **Manage Questionnaires**.
3.	In the **Manage Questionnaires** page, click on the questionnaire title hyperlink or select the line and click **'Respond'** 
4.	Respond to the Questionnaire **Questions** by ticking the correct answer and/or attaching required documents.

<table>
<tr><td></td><td>See an example of a questionnaire.

Questions will vary depending on what the Ministry is requiring from its suppliers.</td></tr>
<tr><td>5.</td><td>Once all sections are answered, you can ‘Submit’ your answers, or you can ‘Save and Close’ if you would like to come back and review later.</td></tr>
<tr><td>6.</td><td>Click OK on the Confirmation pop-up after submitting

</td></tr>
<tr><td>☑</td><td>This completes the section.</td></tr>
</table>

11. How to manage your supplier profile

Overview

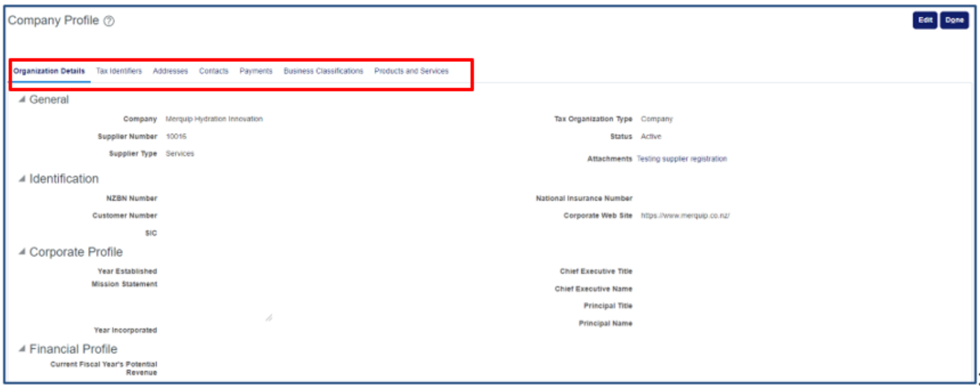
In this section, you will learn how to manage your organisation's details by editing information, adding new contacts, addresses, bank accounts, and additional administrators. The supplier self-service administrator and supplier accounts receivable roles are required to complete the steps., you can follow the system steps outlined below.

a) How to view your organisation’s profile

System steps

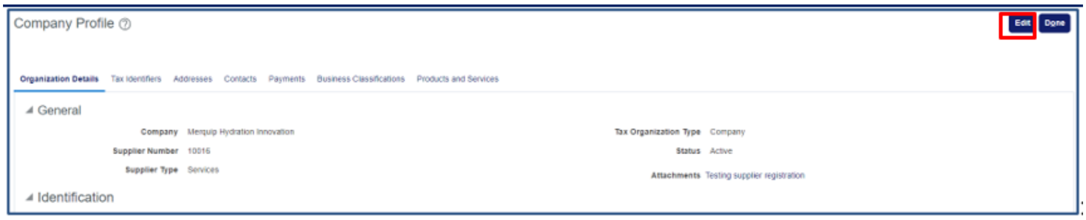
Follow these steps to view your organisation’s profile.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Under Tasks, scroll to Company Profile and click on Manage Profile.

</td></tr>
<tr><td>2.</td><td>Here you can view all your details entered for your organisation. Navigate around by selecting on the tabs available: Organization Details; Tax Identifiers; Addresses; Contacts; Payments; Business Classifications and Products and Services.

</td></tr>
<tr><td>3.</td><td>Click Done (located on the top-right corner) to return to the Supplier Portal home page.</td></tr>
<tr><td>☑</td><td>This completes the section.</td></tr>
</table>

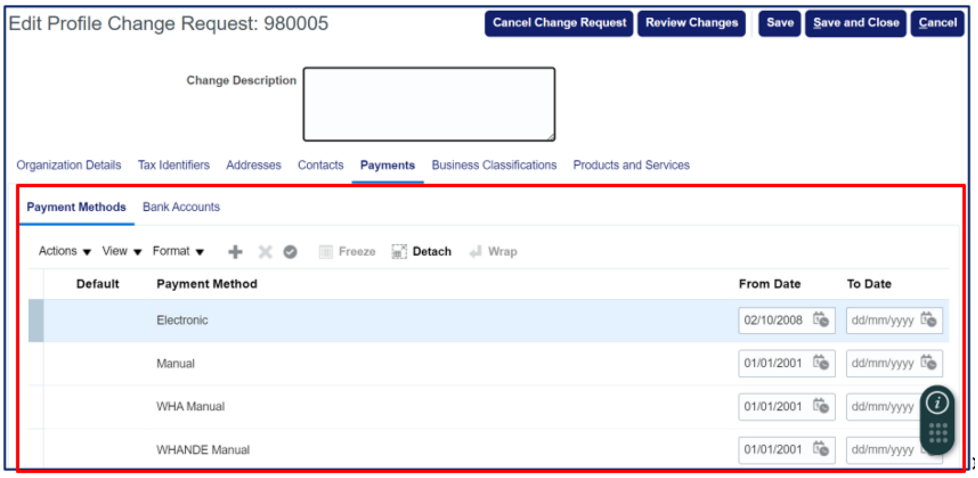
b) How to update your organisation’s profile

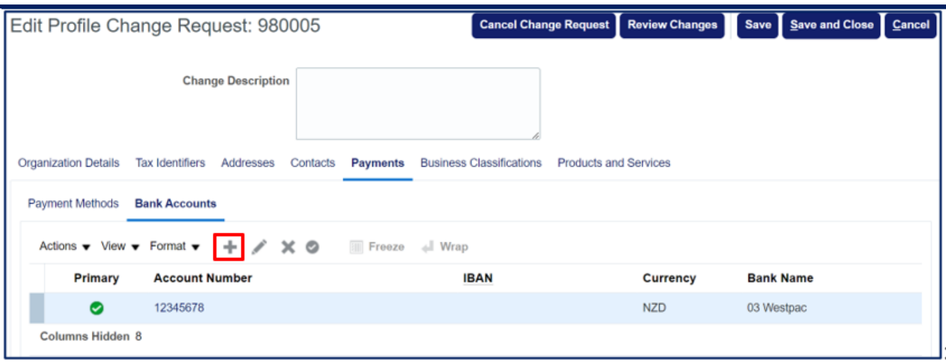
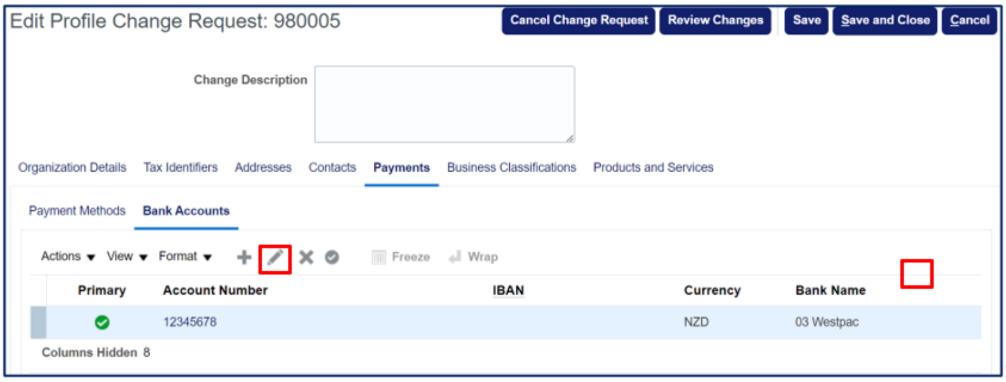
System steps

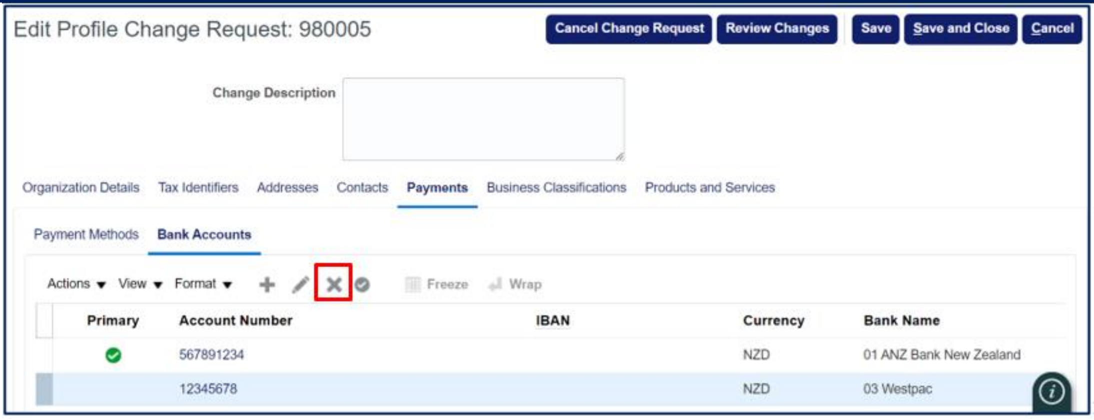
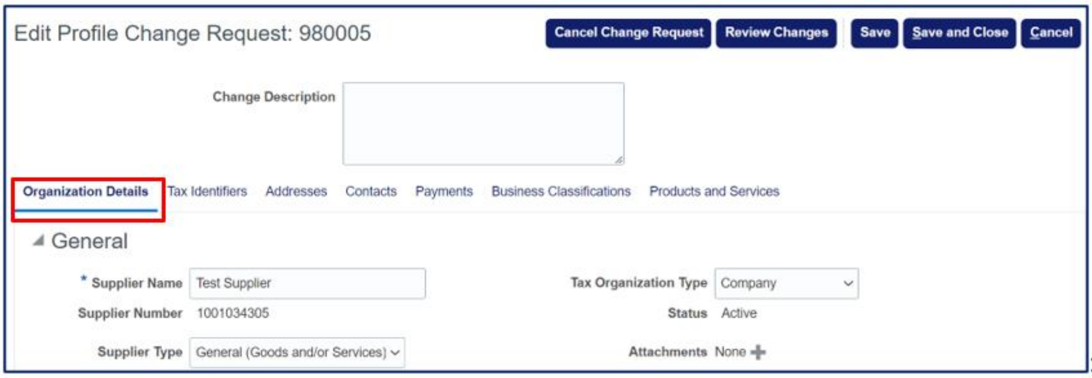
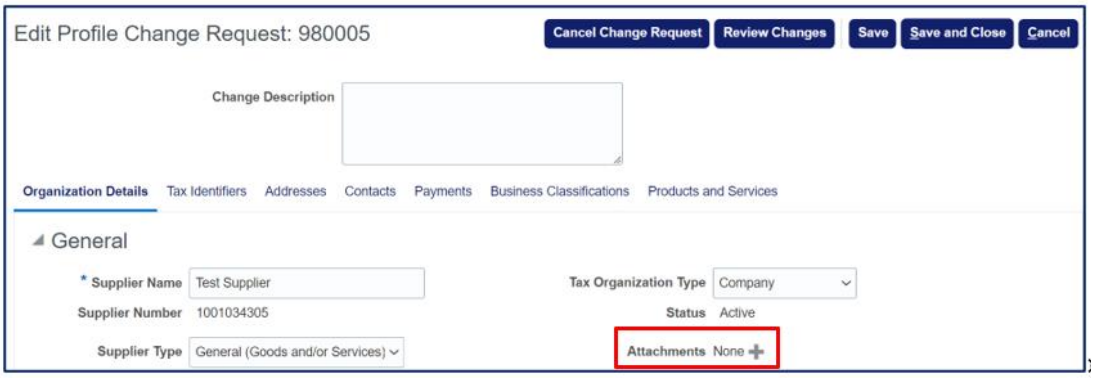
Step	Action
1.	Make sure you have completed [Section 10 (a)]() of this guide. Once done, click on **Edit** located in the top right corner. A **Warning** pop-up box will appear. Click **Yes**. 
2.	Review and edit the fields that requires updating by clicking on each section in the suppolier profile
☑	This completes the section.

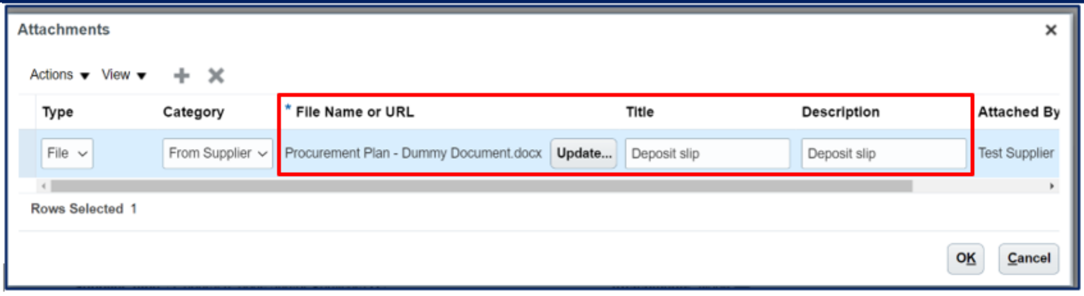
c) How to update the payments tab

System steps

Step	Action
1.	Click on **Edit** located in the top right corner, then click the **Payments** tab.
2.	Review and update **Payment Methods** if necessary. 
3.	Click the next tab **Bank Accounts** to review and update bank account details.
4.	Click the **Add** plus icon if a new bank account needs to be added

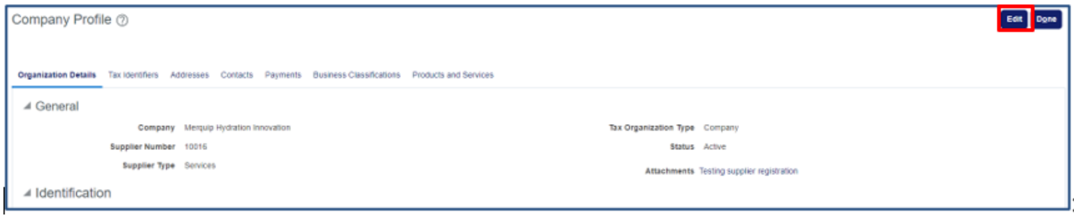
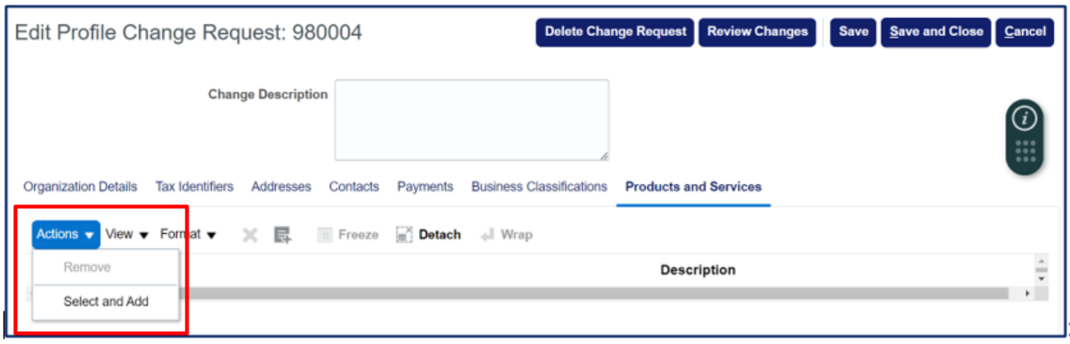
	
5.	Enter your bank account details, then click **OK** to save.
6.	To edit bank account details, highlight the bank account you want to edit and click the pencil **Edit** icon. 
7.	Modify the bank account details and click **OK** to save.
8.	To select a bank account as the primary bank account, click the tick **Primary** icon. A green tick will appear next to the primary bank account. 
9.	To delete a bank account, highlight the bank account you want to delete then select the cross **Delete** icon. You cannot delete a primary bank account.

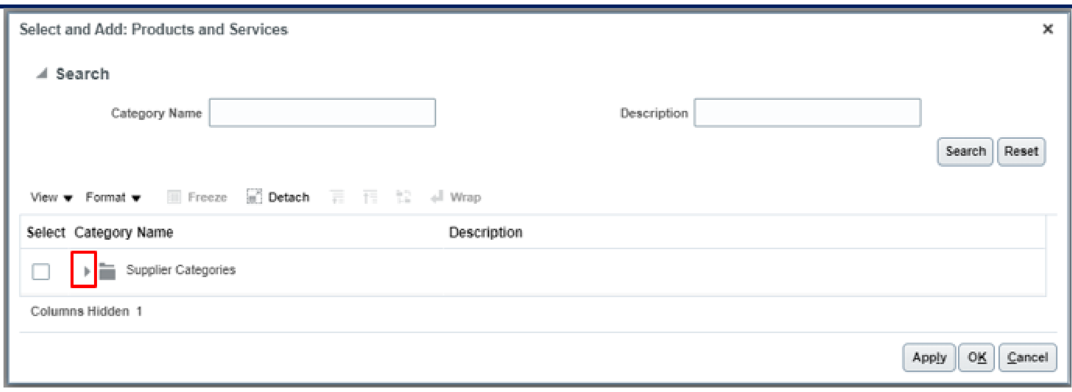
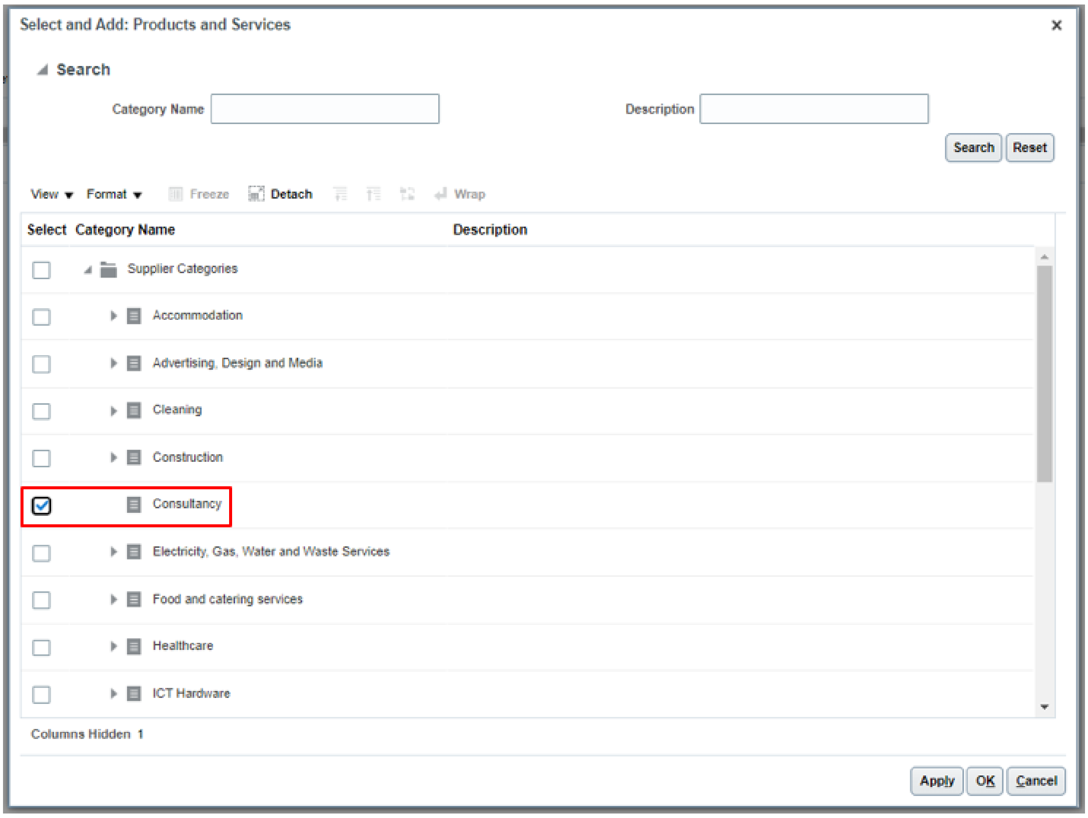
	
	If you are adding or amending a bank account, you will need to attach a deposit slip or evidence of your bank account
10.	To attach a deposit slip, go to the **Organizational Details** tab. 
11.	Click on the **plus** icon next to **Attachments**. 
12.	Choose the file you want to attach, update the **Title** and **Description** fields, and click OK to complete the attachment.

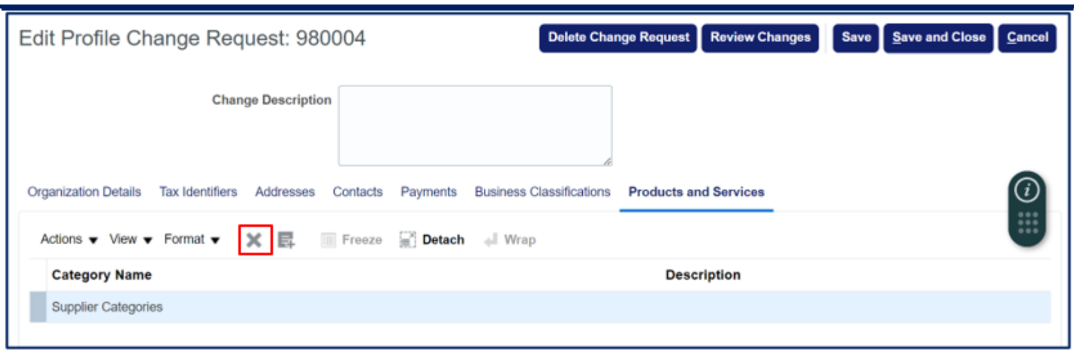
	
☑	This completes the section.

d) How to update the products and services tab

System steps

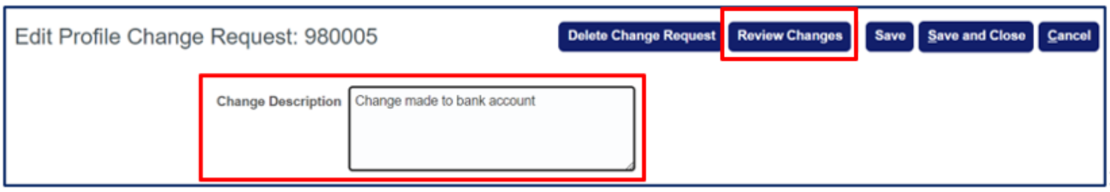
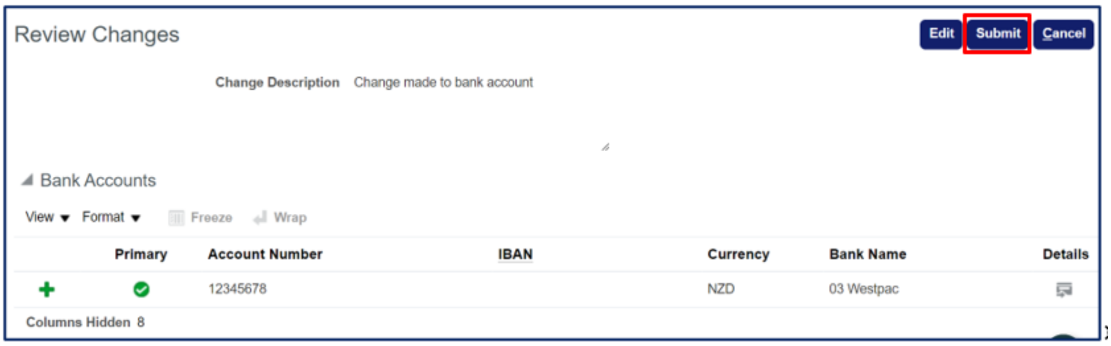
Step	Action
1.	On the company profile page click on **edit** located in the top right corner, then click the **products and services** tab. 
2.	Click on **Actions** then choose **Select and Add**. 
3.	Expand the goods and services by clicking the sidewards arrow next to **Supplier Categories** to expand.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>4.</td><td>Select the relevant categories that represent the products or services your company offers.

</td></tr>
<tr><td>5.</td><td>Click OK to confirm your selection.</td></tr>
<tr><td>6.</td><td>To delete products and services, highlight the line item, then click the cross delete icon.</td></tr>
</table>

	
	This completes the section.

12. How to submit changes for approval

System steps

Step	Action
1.	When all the changes are complete, provide a brief description of the changes you have made in the **Change Description** field. 
2.	Click on **Review Changes** to view a list of all the changes you have made, click **Submit**. 
	Note: Changes made to your organization's profile through the Supplier Portal will be submitted for the Ministry of Social Development's approval. Only approved changes will be reflected in the Supplier Portal. For urgent changes, please contact NAC_Suppliers@msd.govt.nz.

<table>
<tr>
<td></td>
<td>You can edit or cancel the change request at any time by selecting the appropriate options in the top right-hand corner.

</td>
</tr>
<tr>
<td>3.</td>
<td>Click Done to return to the Supplier Portal homepage.</td>
</tr>
<tr>
<td></td>
<td>Congratulations! You have successfully submitted your changes for approval.

What’s next?

You will receive a notification regarding the status of your changes. You will be notified both within the application and via email for the following scenarios:
Approved: Your changes have been approved and will be reflected in the Supplier Portal.
Cancelled: Your changes have been cancelled and will not be implemented.
Information Requested: MSD requires more information regarding the changes you have made. Please provide the necessary information to proceed.
If you have any further questions or concerns, please reach out to the support team at NAC_Suppliers@msd.govt.nz.</td>
</tr>
</table>