LOG820 Supplier Self-Service eLearning

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Supplier Self-Service

LOG820

Course Audio

Course Audio

This eLearning course contains audio.

Please make sure your speakers and headset or earbuds (if applicable) are turned on and working at this time.

Important Note:

Many slides in this course contain additional information in the audio. Please listen to the audio narration or view the closed captioning by clicking the transcript button located on the bottom of this screen.

Course Navigation

Course Navigation

The buttons you need to navigate the course are located in the top right corner and along the bottom of the screen. To proceed to the next slide, click Next in the lower right corner.
If you need to go back to a slide or navigate directly to a lesson, click Menu in the top right corner of the screen.

Additional Information

Additional Information

Throughout this course, you will notice that there are arrow icons like the one pictured on the right. Please place your mouse over **every arrow** in this course to read additional infomation about the image displayed.

Try it now: Please place your mouse over the arrow on the right.

1

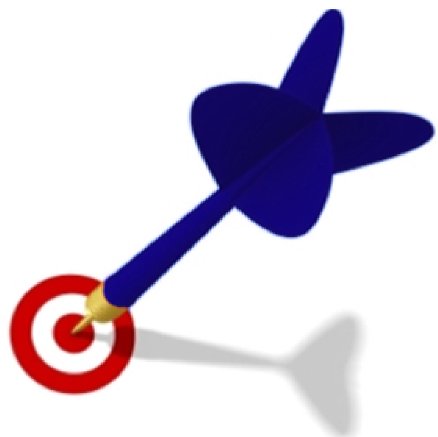
1 -
You will receive additional information in these blue boxes.

Course Objectives

Course Objectives

At the end of this course, you will be able to:

- Explain Supplier Self-Service Activities
- Maintain Company Data
- Maintain Own Data (Admin)
- Create Contact Persons
- Display RFx Documents
- Manage RFx Responses
- Display and Print Purchase Order
- Report on Vendor Spend Data



Key Terms

Key Terms

MAGIC - **M**ississippi's **A**ccountability System for **G**overnment **I**nformation and **C**ollaboration
The Mississippi State Government's Enterprise Resource Planning (ERP) solution. Powered by SAP Public Sector® software, MAGIC replaces the State's legacy administrative systems with a fully-integrated information system.
Supplier
A vendor of goods or services.
Supplier Administrator
The contact person within a supplier's company who is responsible for the supplier account

Key Terms

Key Terms

FEIN – Federal Employer Identification Number (also known as Federal Tax Identification Number)
A unique number assigned to a business which identifies the business as a taxpayer. A FEIN is unique to a business just like a Social Security Number is unique to a person.
D-U-N-S Number
A unique 9-digit identifier required for all businesses registering with the US Federal government for contracts or grants

Key Terms

Key Terms

Product Category
Categories of goods and services that your company provides to the State of Mississippi
RFx
Term used to refer to various types of documents used to request responses from suppliers (RFP, ITB, RFQ, RFI, etc.)
RFx Response
A response by the supplier to a request for goods and services from the State of Mississippi when using an RFx document

Lesson 1: Supplier Self-Service Overview

Lesson 1: Supplier Self-Service Overview

This lesson will explain:

- Supplier Registration
- Supplier Self-Service Benefits
- Supplier Self-Service Portal Logon
- Maintaining Company Data
- Upload W-9 Form
- Find User
- Additional User Creation

Supplier Registration

Supplier Registration

New suppliers must register with the SoMS.

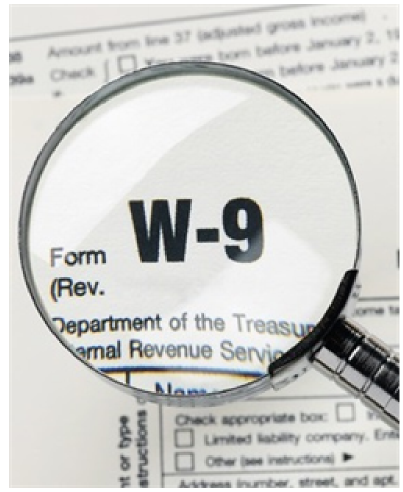
- The online registration link is located on the Mississippi Management & Reporting System website
- Once registered, suppliers are provided Self-Service Portal access

http://www.mmrs.state.ms.us

http://www.mmrs.state.ms.us - http://www.mmrs.state.ms.us

Benefits of Supplier Self-Service

Benefits of Supplier Self-Service



Registered Suppliers have access to the Supplier Self-Service Portal and are added to the SoMS Supplier List in order to:

- Respond to SoMS RFx invitations
- Review Purchase Orders issued to your company
- Receive notifications of engagements, such as Bid Awards, Purchase Orders, etc.
- Upload W-9s to your supplier record

NOTE: *You must submit a W-9 after registering before you may be awarded a purchasing agreement*

Supplier Notifications

Supplier Notifications

Registered suppliers receive e-mail notifications for various procurement activities:

- RFx Invitations based on Product Category
- New or updated Purchase Orders

Supplier Login

Supplier Login

Go to the Supplier Self-Service Portal to log on to MAGIC.

1 -
Enter your User name and Password. Click Log On.

2 -

Click the Log On button to continue.

Supplier Self-Service Portal

Supplier Self-Service Portal

After you log on you are taken to the Supplier Self-Service Home Page.

Now It's Your Turn - Exercise

Now It's Your Turn!

Log on to the Portal
In this exercise you will:

- Log on to the Supplier Self-Service Web Portal

To complete this exercise, please click this link.

click this link -
http://uperform.magic.ms.gov/ucontent/a8202484df8349938d992d6b9dda3d39_en-US/sim/html/sim_standard.htm

Knowledge Check

Knowledge Check

*Directions: Select the best answer to the question, and click **Continue** to submit your answer.*

What must the supplier submit before they can submit a bid?

A W-4

B W-16

C W-2

D W-9

Maintain Company Data

Maintain Company Data

Keeping your supplier record current is essential for doing business with the SoMS.

- Avoid documents being sent to an incorrect e-mail address
- All changes will be reviewed and approved by the State of Mississippi
- If changes are rejected, the Supplier Administrator will receive an e-mail notification and the supplier record will revert back to how it was before the changes were submitted

Maintain Company Data

Maintain Company Data

From the Supplier Self-Service home page, you can maintain your supplier information record.

1 -
Then, select **Company Data** from the Navigation Menu.

2 -

First, go to the **Administration** tab.

3 -

Click Process to start making changes to your Company Data.

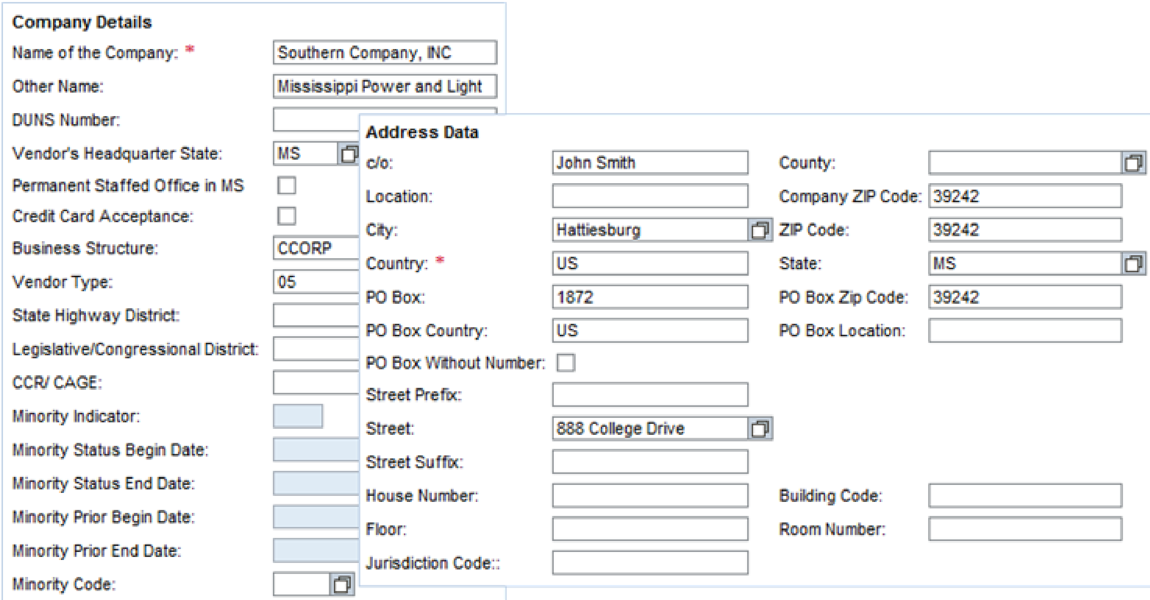
Maintain Company Data

Maintain Company Data

The supplier record has multiple sections.
The first section, Company Details, enables you to maintain your company name and address, FEIN and/or D-U-N-S Number, and vendor type.

- D-U-N-S Number will help identify supplier locations (optional)
- Use your company's main address (the same one used on the W-9 form)

Company Details



Company Details

You can update any of the information in a white field.

Supplier Ordering Address Change

Supplier Ordering Address Change

The Supplier Ordering Address Submission/ Change Form is used for requesting a change for alternate ordering addresses.

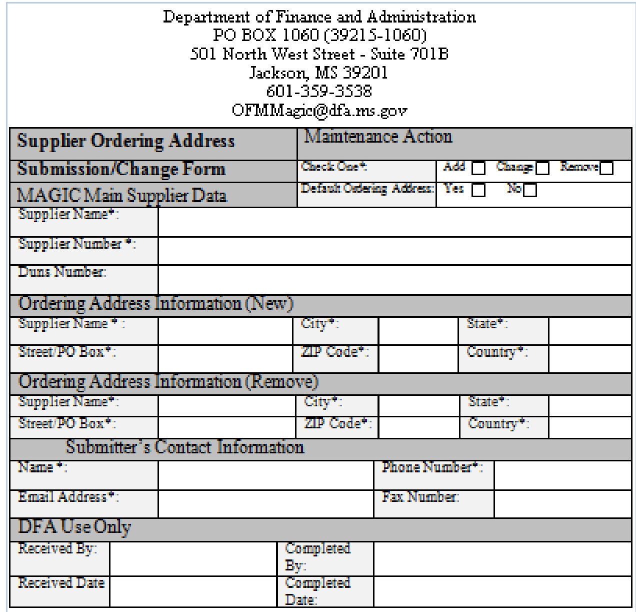
- Use when you have a main office address and alternate addresses for receiving purchase orders
- This form is specifically for the alternative address(es)
- The form cannot be used for changing the W-9 address
- E-mail the completed forms to: OFMMagic@dfa.ms.gov

OFMMagic@dfa.ms.gov - mailto:OFMMagic@dfa.ms.gov

Ordering Address Data

Ordering Address Data

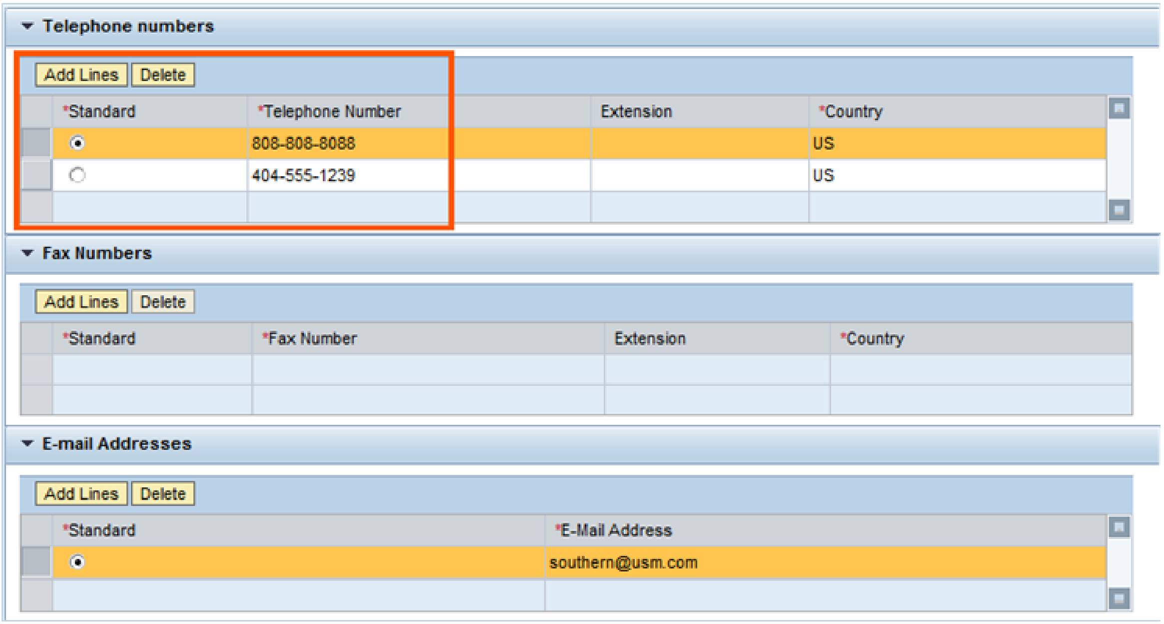
This form is only used to create, change or delete alternative order address data. All other changes can be maintained from the Supplier Self-Service Portal.



Department of Finance and Administration
PO BOX 1060 (39215-1060)
501 North West Street - Suite 701B
Jackson, MS 39201
601-359-3538
OFMMagic@dfa.ms.gov

Supplier Ordering Address		Maintenance Action			
Submission/Change Form		Check One*:	Add ☐ Change ☐ Remove ☐		
MAGIC Main Supplier Data		Default Ordering Address:	Yes ☐ No ☐		
Supplier Name*:					
Supplier Number *:					
Duns Number:					
Ordering Address Information (New)					
Supplier Name * :		City*:		State*:	
Street/PO Box*:		ZIP Code*:		Country*:	
Ordering Address Information (Remove)					
Supplier Name*:		City*:		State*:	
Street/PO Box*:		ZIP Code*:		Country*:	
Submitter's Contact Information					
Name *:		Phone Number*:			
Email Address*:		Fax Number:			
DFA Use Only					
Received By:		Completed By:			
Received Date		Completed Date:			

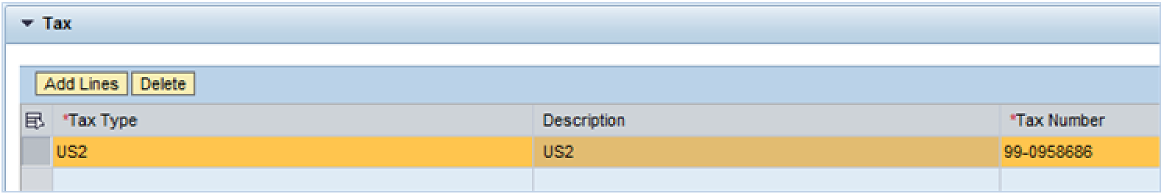
Communication Data



Communication Data

Update Contact information for your company in this section.

Tax Data



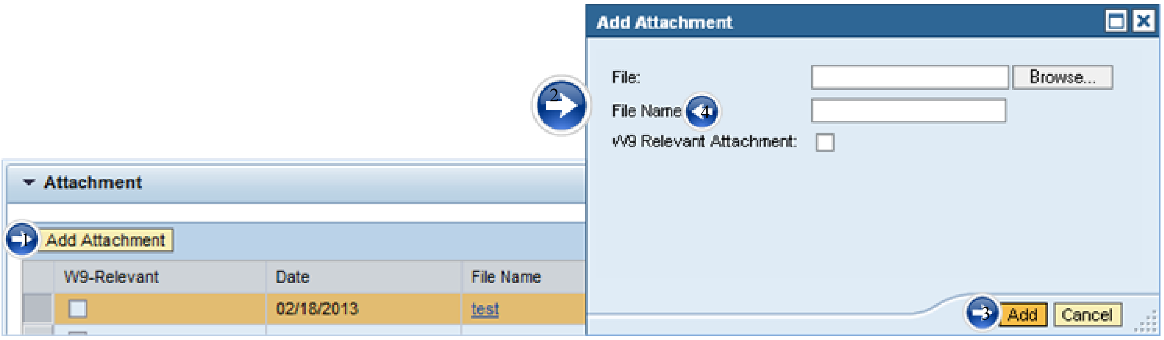
Tax Data

In this section, please enter either the company FEIN Number or Social Security Number (SSN).

- FEIN: use tax type US2
- SSN: use tax type US1

A new W-9 must be attached for any changes made to this information.

Upload W-9 Form



Upload W-9 Form

Any document relevant to your company can be attached to the supplier record.

- The W-9 (in pdf) must be attached to the record
- W-9 Relevant Attachment checkbox must be selected

1 -
Click **Add Attachment** to upload the company W-9 form

2 -

In the Add Attachment dialog box, Browse for the for the file to upload. Then, check **W-9 Relevant Attachment**.

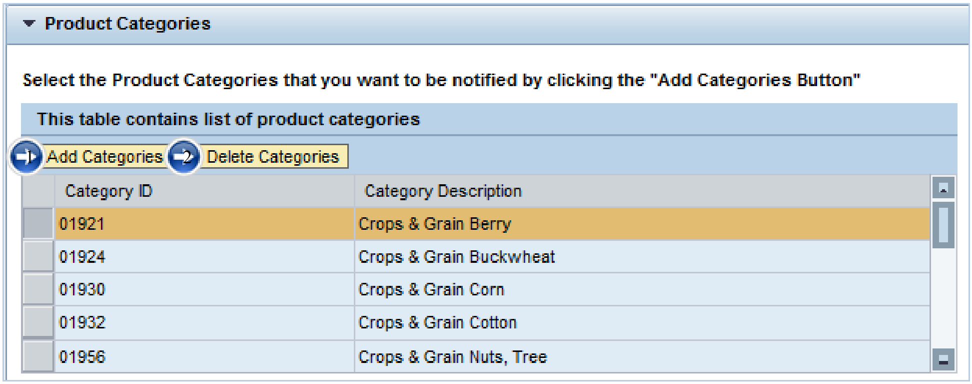
3 -

Click **Add**.

4 -

Use the **File Name** that downloads or rename accordingly.

Product Category



Product Category

Supplier records are identified by product categories that represent the goods and services provided by the supplier.

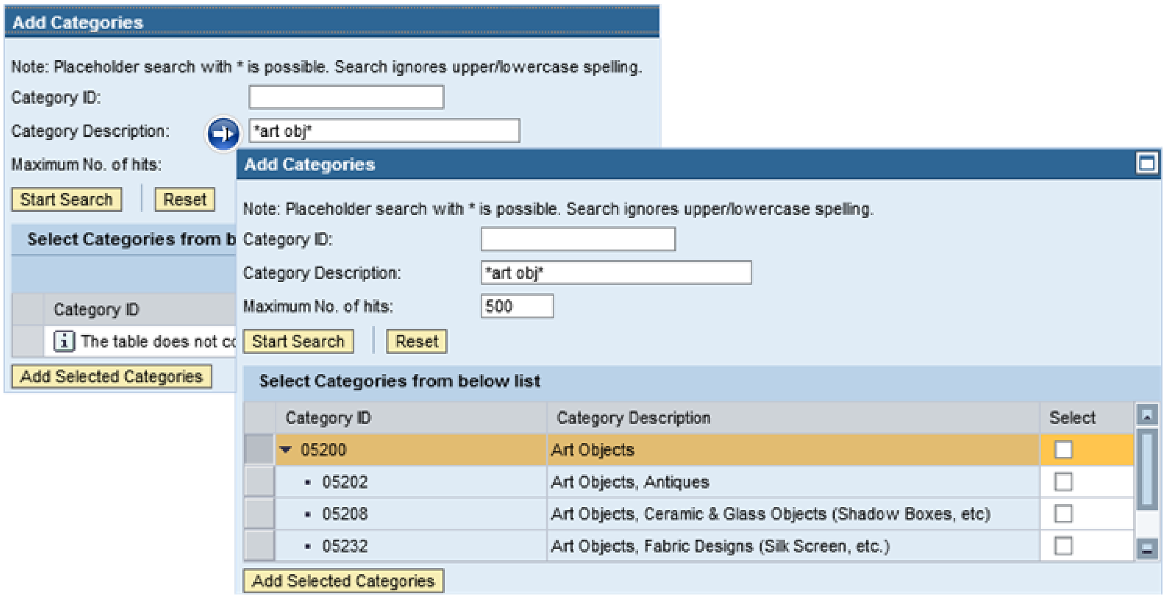
- Categories support the bidding process and drive placement on the Supplier List
- Bid Invitations are sent to suppliers according to the Categories selected

1 -
Click **Add Categories** button to add new categories to the list.

2 -

To remove product categories, select the categories that you want to delete and click **Delete Categories** button.

Add New Product Category



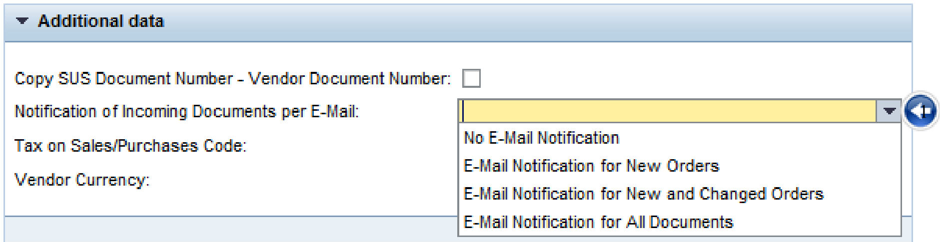
Add New Product Category

To add new product categories to your supplier record, use the key word search to find the best options.

1 -

To search for categories use **Category Description**. You can use an * (asterisk) for wild card searches. It can be used before and/or after the word to broaden your search options.

Additional Data



Additional Data

You can specify your notification preferences in the Additional data section.

1 -
Use the drop down list to see the options for notification preference.

Complete Company Data Maintenance

Complete Company Data Maintenance

You must save your changes before they are submitted to the State for review.
The State reviews and either approves or rejects the changes.

Now It's Your Turn - Exercise

Now It's Your Turn!

Maintain Company Data
In this exercise you will:

- Change Company Information

To complete this exercise, please click this link.

click this link -
http://uperform.magic.ms.gov/ucontent/634a0212533e4ecfbfe3f4b8cd30a193_en-US/sim/html/sim_standard.htm

Knowledge Check

Knowledge Check

*Directions: Select the best answer to the question, and click **Continue** to submit your answer.*

When do you use the Supplier Ordering Address Submission / Change Form?

A When you have a main office address and alternate addresses for receiving purchase orders

B When changing the W-9 address

C When changing your physical mailing address

Knowledge Check

Knowledge Check

Directions: Select the best answer to the question, and click ***Continue*** *to submit your answer.*

A change to the FEIN or SSN requires a new W-9.

A True

B False

Maintain Own Data

Maintain Own Data

Along with Company Data, personal contact information can be maintained in the Own Data section.

1 -
Then, choose **Own Data** on the menu tree.

2 -

First, go to the **Administration** tab.

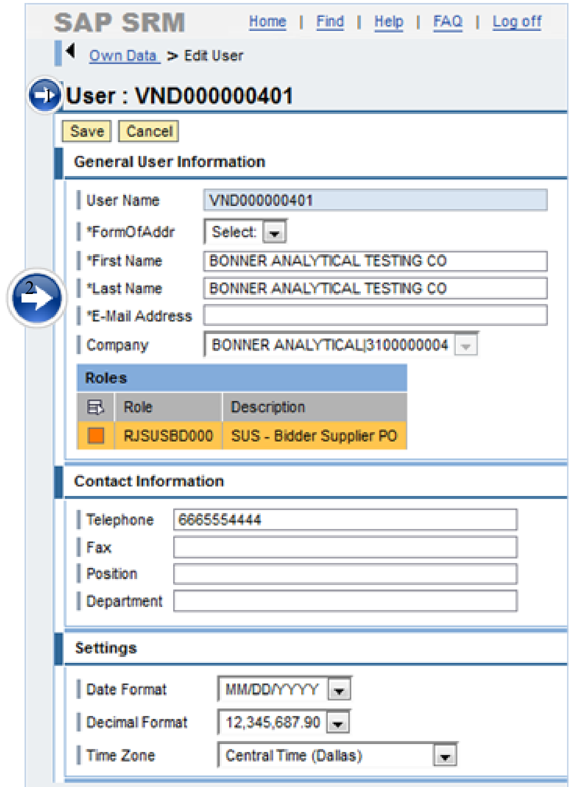
3 -

Click **Process** to make changes to your own data.

Maintain Own Data

Maintain Own Data

The information in this section is person specific.



1 -
User Name is system generated and cannot be changed.

2 -

You can make changes to the **General User Information** such as e-mail address. You can also make changes to your contact information and select your setting preferences such as **Date Format** and **Decimal Format**.

Now It's Your Turn - Exercise

Now It's Your Turn!

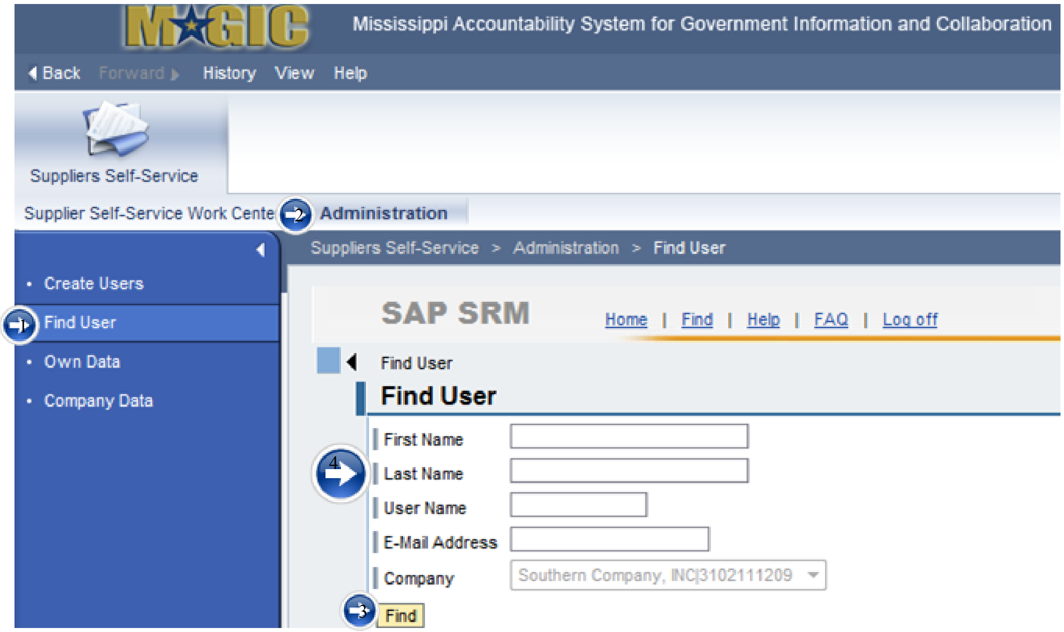
Maintain Own Data
In this exercise you will:

- Change Own Data

To complete this exercise, please click this link.

click this link -
http://uperform.magic.ms.gov/ucontent/0e7e99b76c5547bb80d39609353d736c_en-US/sim/html/sim_standard.htm

Find Users



Find Users

You can find the users that have been created for your company.

1 -
Then, choose **Find User** on the menu tree.

2 -

First, go to the **Administration** tab.

3 -

Click **Find** to look for that user.

4 -

Enter user **First Name**, **Last Name** and/or **E-Mail Address**, etc.

Now It's Your Turn - Exercise

Now It's Your Turn!

Find Users
In this exercise you will:

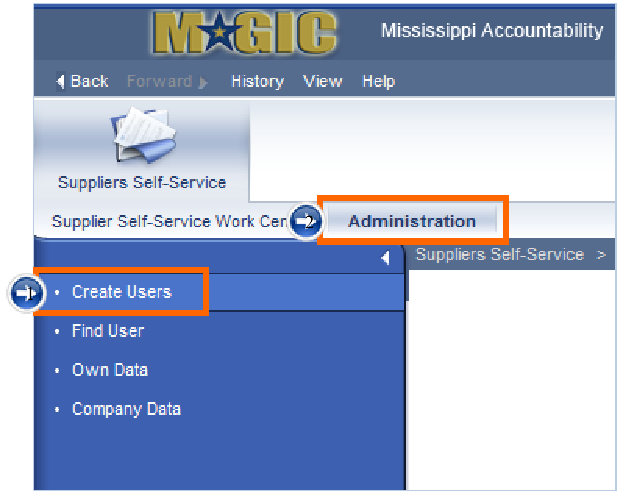
- Find Additional Users

To complete this exercise, please click this link.

click this link -
http://uperform.magic.ms.gov/ucontent/62afbe2ae7c7405b84381ff25f7d0497_en-US/sim/html/sim_standard.htm

Create Additional Users

Create Additional Users



Additional users may be added to the record. These users have access to the following:

- View RFx and Purchase Orders
- Create RFx Responses
- Maintain their Own Data

1 -
Then, select **Create Users** to create additional users.

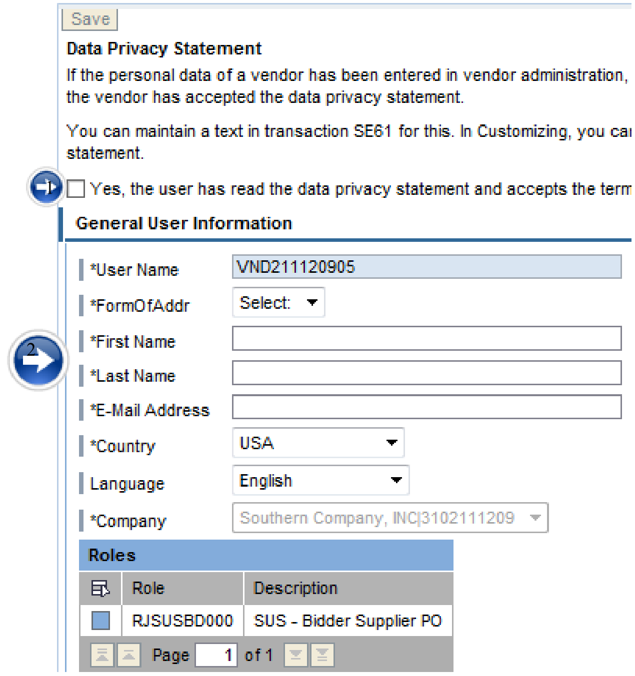
2 -

Select **Administration** to create additional users.

Create Additional Users

Create Additional Users

From this screen, you can enter General User Information such as name and e-mail address. You may also select the security role for the user.



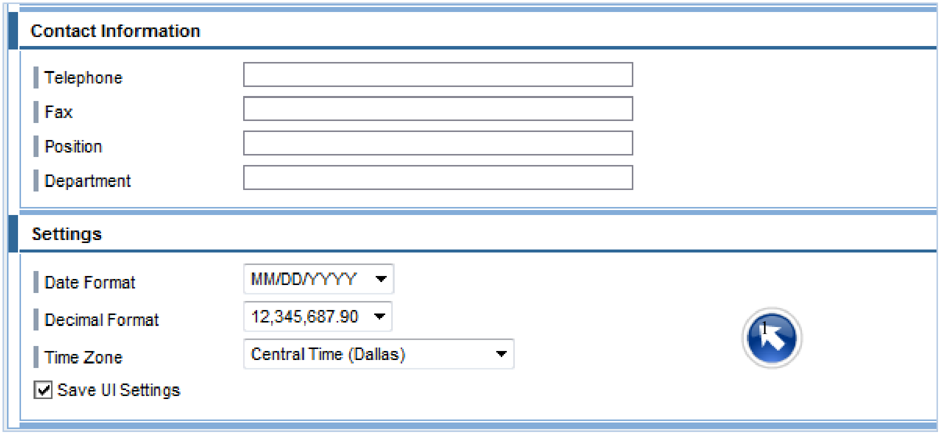
1 -

Must click the**YES** check box at the top of the screen in the privacy statement section.

2 -

Enter **General User Information** for the new user you are creating. The **User Name** is system generated and cannot be changed. All other fields are required, including the **Roles**.

Create Additional Users



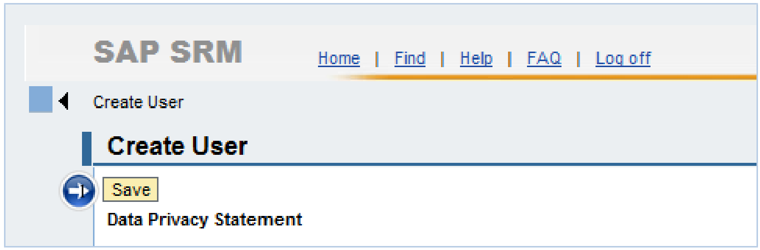
Create Additional Users

You will scroll down the page to view the Contact Information and Settings sections.

1 -

Complete the **Contact Information** fields such as telephone and fax. If you want to change your display settings such as **Date Format** or**Time Zone**, make your selections here.

Create Additional Users



Create Additional Users

You will scroll down the page to view the Contact Information and Settings sections.

1 -
After entering all the user information, page up to the top of the screen and click **Save** to create the user.

Now It's Your Turn - Exercise

Now It's Your Turn!

Create Additional Users
In this exercise you will:

- Create a New User in the Supplier Self-Service Portal

To complete this exercise, please click this link.

click this link -
http://uperform.magic.ms.gov/ucontent/247d9c4ae6c84f779b382b614309280e_en-US/sim/html/sim_standard.htm

Knowledge Check

Knowledge Check

*Directions: Select the best answer to the question, and click **Continue** to submit your answer.*

All registered users will have authorization to complete which of the following?

A Maintain own data, view and respond to RFxs and purchase orders

B Maintain own data and company data, view RFx, submit RFx responses

C Maintain company data, view purchase orders and RFxs

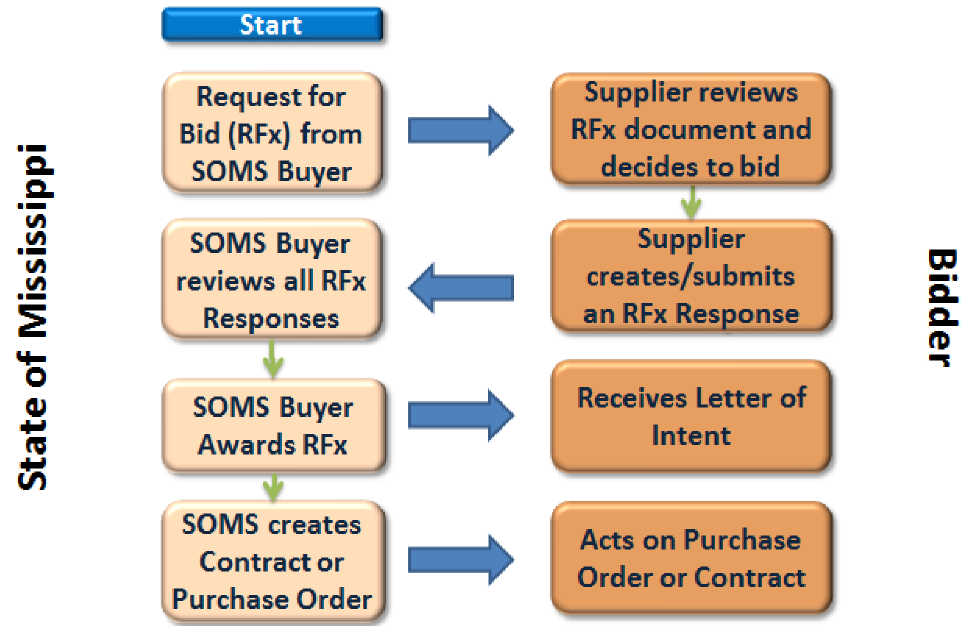
Lesson 2: RFx

Lesson 2: RFx

This lesson will explain:

- RFx Process Overview
- RFx Notification
- RFx Document Information
- RFx Response

RFx Process Overview



RFx Process Overview

This process starts with the Buyer creating an RFx and making it available to the supplier. The supplier reviews the RFx and decides whether or not to participate.

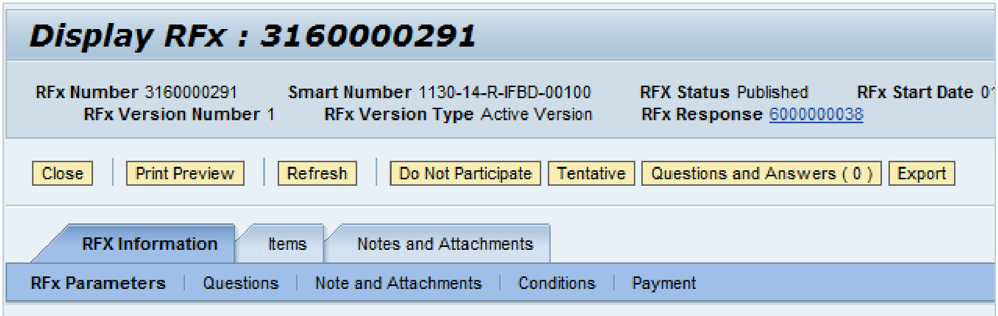
RFx Notification

RFx Notification

The notification for an RFx invitation is provided to suppliers by one or more of the following methods:

- E-mail sent to the Supplier Contact Person
- Newspaper
- Mississippi Public Bid Board Website
- Supplier Self-Service Portal for registered suppliers

RFx Document Information



RFx Document Information

RFx documents provide relevant information:

- RFx Information (i.e. submission date, opening date, buyer contact information)
- Item details (i.e. item description, quantity requested, delivery dates, ship to address)
- Notes and Attachments (i.e. material or service specs, terms and conditions)

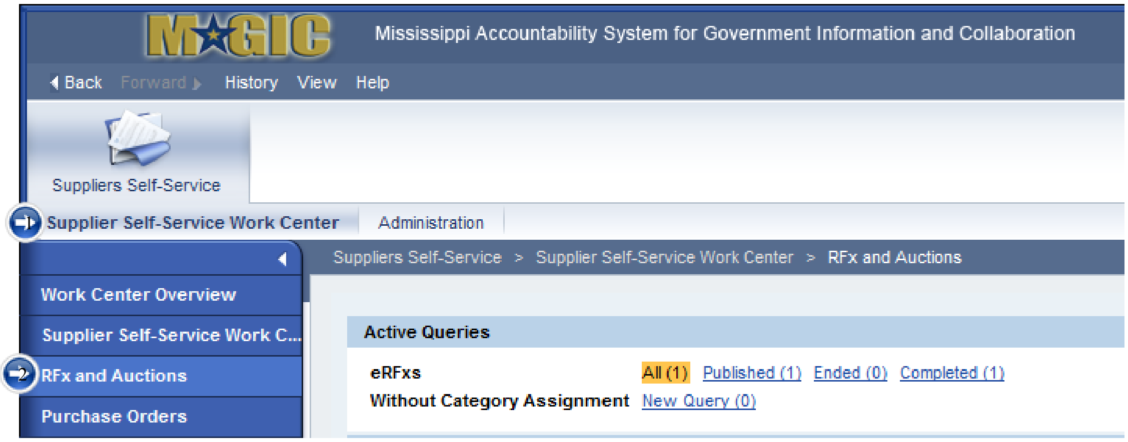
RFx Response

RFx Response

With the RFx Response feature, suppliers are able to:

- Respond to an RFx electronically through Supplier-self-service or submit a paper response
  NOTE: Submit RFx responses prior to the bidder submission deadline date/time
- Update the RFx Response electronically at any time (as allowed), up to the bidder submission deadline date/time

Search & Display an RFx



Search & Display an RFx

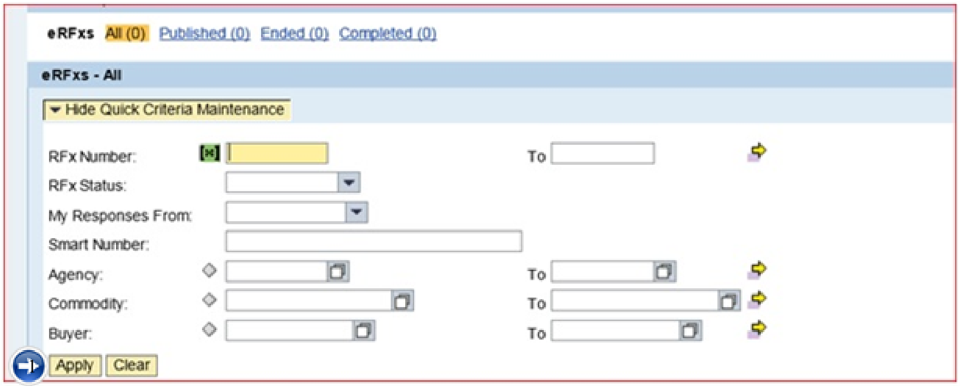
MAGIC provides search functionality to enable looking up RFx information.

1 -
Click **Supplier Self-Service Work Center**.

2 -

Next, click **RFx and Auctions** to search and display.

RFx Search Fields



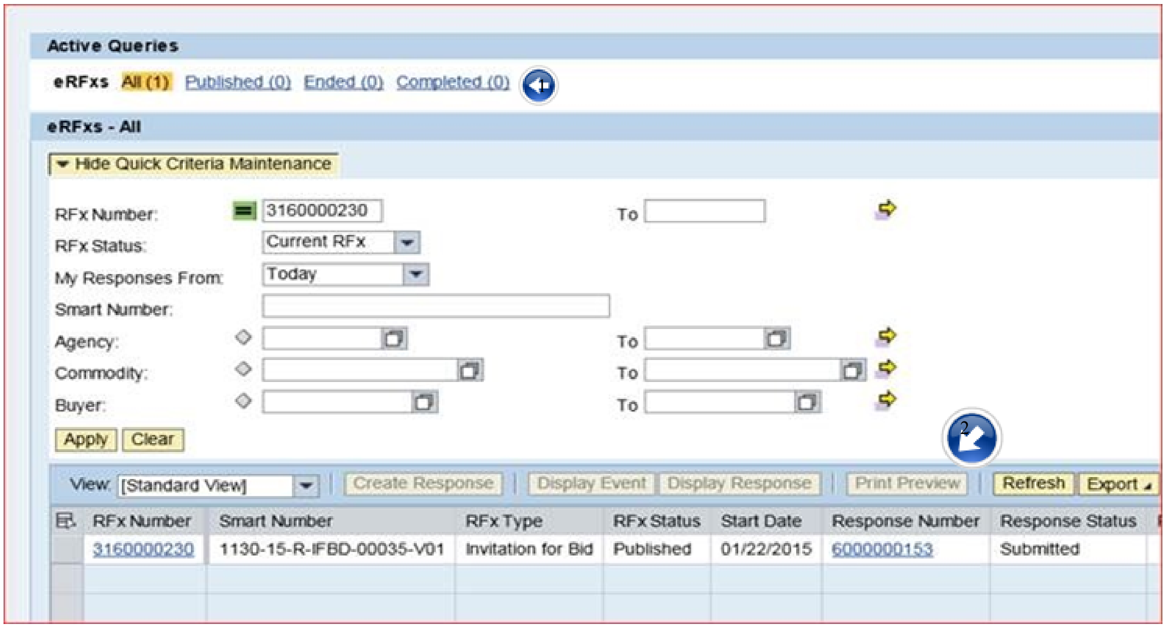
RFx Search Fields

You have many options available to aid in your search:

- RFx Number
- RFx Status
- Agency
- Commodity
- My Response From
- Buyer
- Smart Number

1 -
Enter the search criteria and click **Apply**.

RFx Lists



RFx Lists

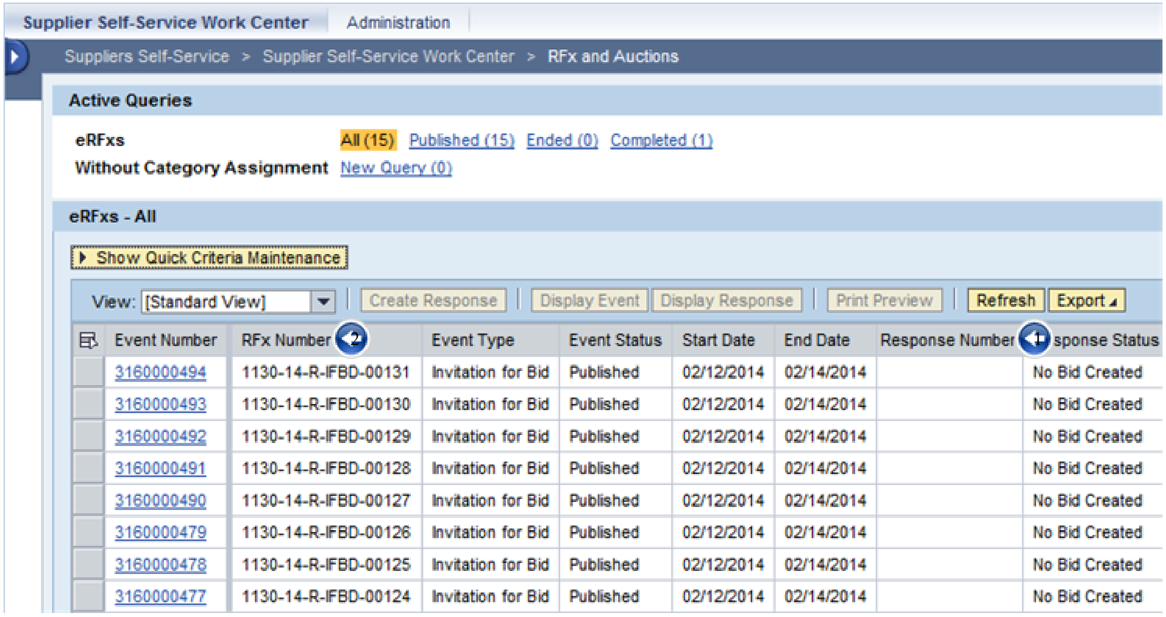
Search queries provide a list of results from which to choose.

1 -
Active Queries are pre-defined searches to help you easily display information.

2 -

This screen displays the RFx from a supplier’s view.

Respond to an RFx



Respond to an RFx

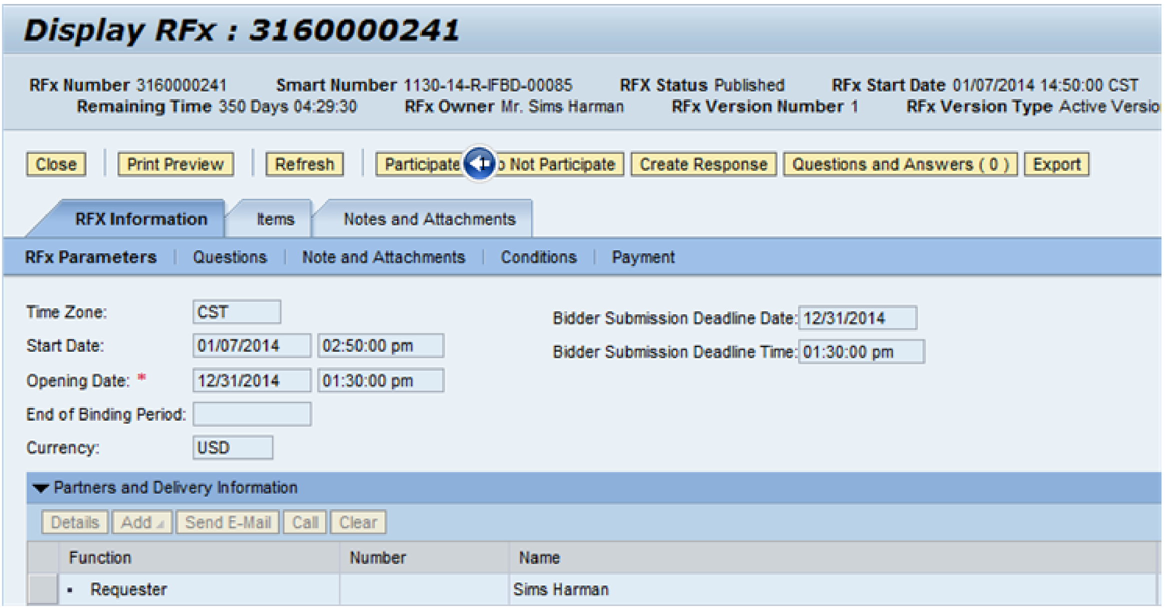
When you receive an RFx notification you may respond to it via the RFx document found on the RFx list.

1 -
Review the status to see if a bid response has been created.

2 -

Click the RFx number to display for review.

Choose to Participate

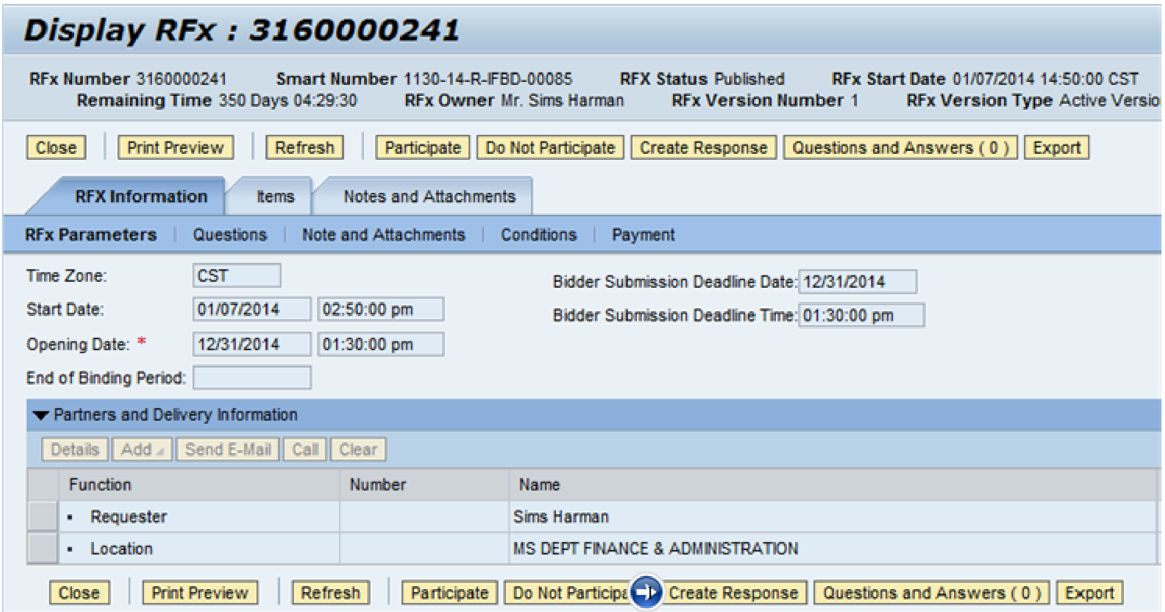


Choose to Participate

After you have reviewed the RFx, you may notify the agency of your plan to participate or not.

1 - Click **Participate** to notify agencies you plan to create an RFx response.

Create an RFx Response

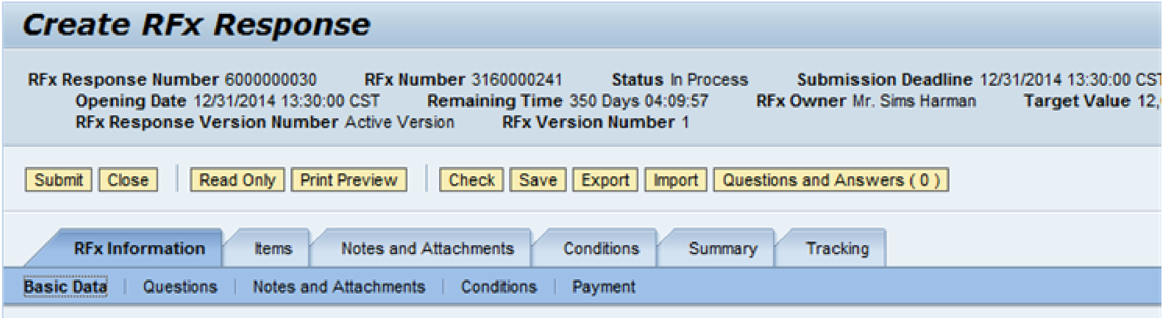


Create an RFx Response

You have signified your plan to participate and now you can create the response.

1 -
Click **Create Response**.

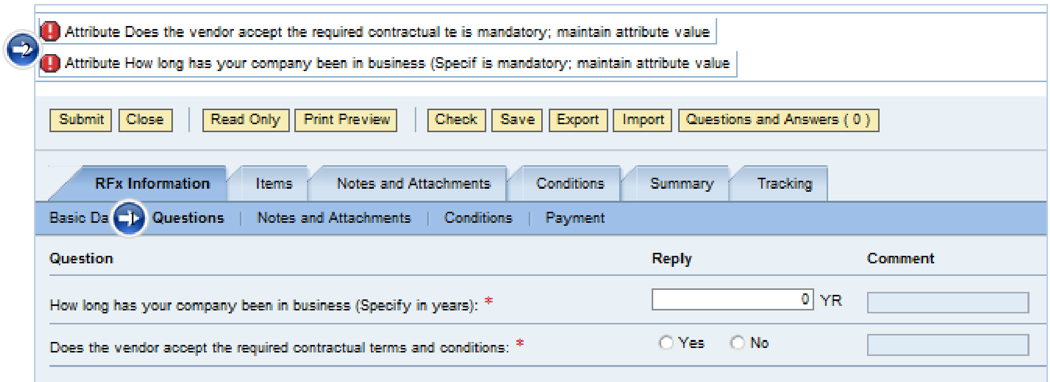
Create an RFx Response: Buttons



Create an RFx Response: Buttons

If there are questions from purchaser, you can display and respond to them here.

Create an RFx Response: Questions



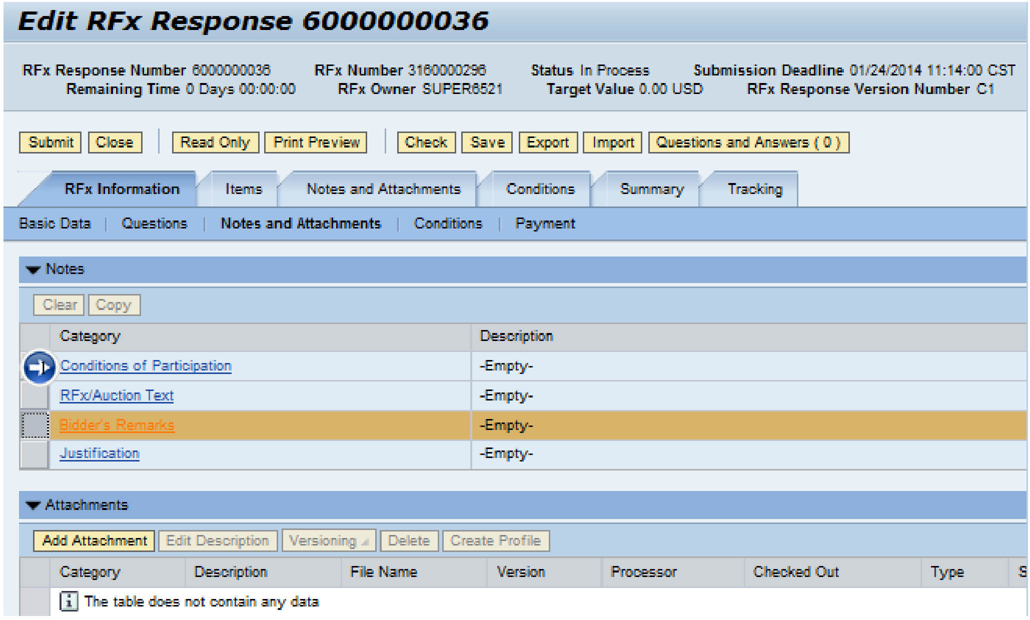
Create an RFx Response: Questions

If there are questions from purchaser, you can display and respond to them here.

1 -
Use the **Questions** tab to respond to the buyer's questions.

2 -Error messages are generated when the required questions are not answered.

Create an RFx Response: Notes and Attachments



Create an RFx Response: Notes and Attachments

The Notes and Attachments section allows you to provide additional information to the buyer.

1 -There are several categories of notes. Bidder can add remarks for the buyer.

Now It's Your Turn - Exercise

Now It's Your Turn!

Create an RFx Response
In this exercise you will:

- Display an RFx
- Create an RFx Response
- Add Attachment

To complete this exercise, please click this link.

click this link -
http://uperform.magic.ms.gov/ucontent/3d60f5f6b49642659d95464cd0a5e424_en-US/sim/html/sim_standard.htm

Knowledge Check

Knowledge Check

*Directions: Select the best answer to the question, and click **Continue** to submit your answer.*

Which of the following is not used to provide RFx invitation to the suppliers?

A) E-mail sent to the Supplier Contact Person

B) Fax

C) Mississippi Public Bid Board Website

D) Supplier Self-Service Portal for registered suppliers

Knowledge Check

Knowledge Check

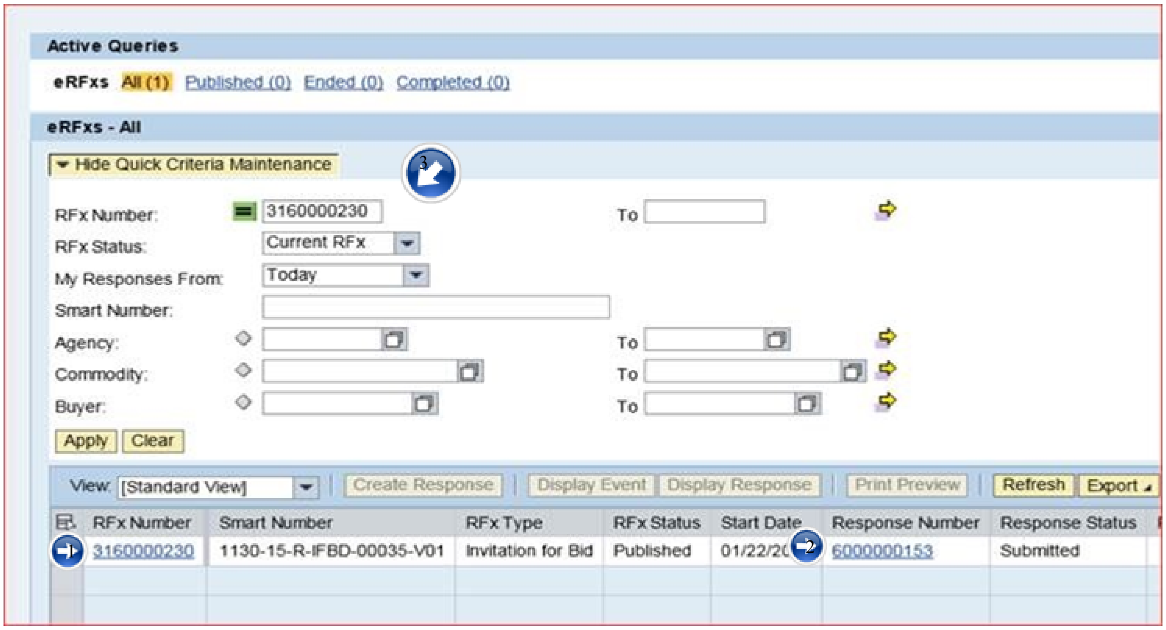
*Directions: Select the best answer to the question, and click **Continue** to submit your answer.*

True or False. You must notify SoMS of your plan to participate in the RFx process.

A True

B False

View RFx Response

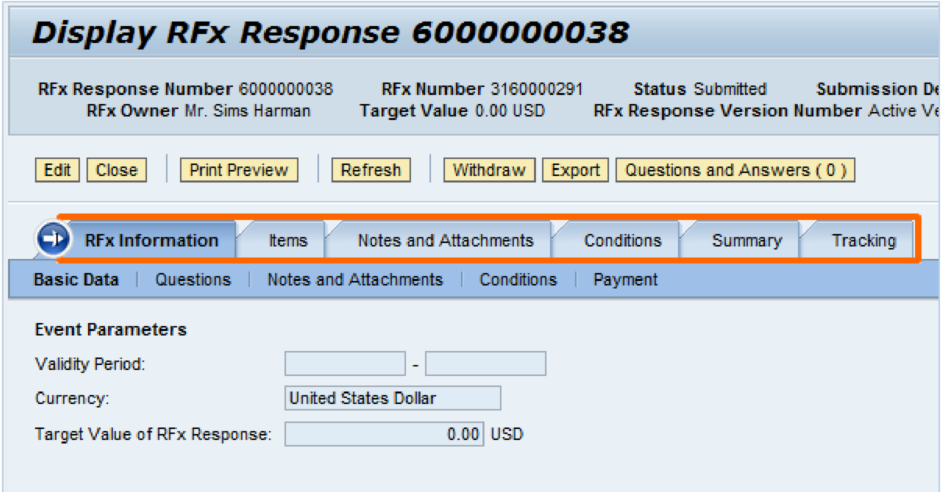


View RFx Response

To view RFx responses you will return to the Supplier Self-Service Work Center > RFx and Auctions screen.

1 -To view an RFx click the Event Number.
2 -To view a Response click the Response Number.
3 -You can search for a specific RFx response or you can view a list.

View RFx Response Details

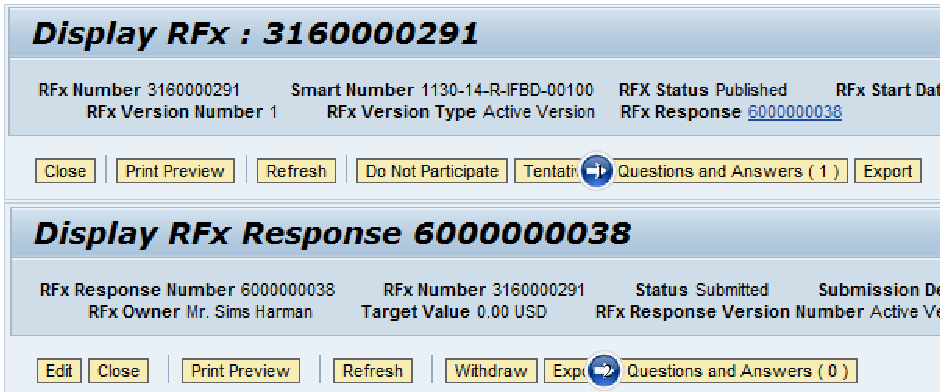


View RFx Response Details

The RFx Response screen has several tabs to organize the information.

1 -
Tabs that organize the information.

Ask the Buyer a Question



Ask the Buyer a Question

Questions and Answers can be accessed from the RFx or the RFx Response.

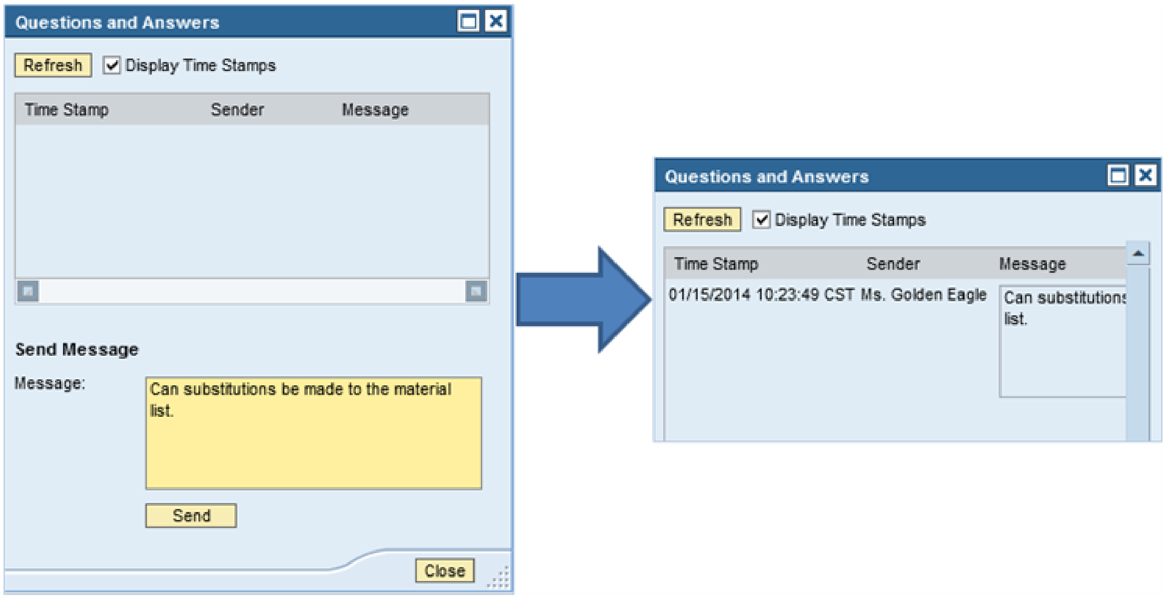
1 -

Click **Questions and Answers**.

2 -

Click **Questions and Answers**.

Ask the Buyer a Question



Ask the Buyer a Question

Enter the question in the Message text box. Click the Send button and the time stamp will be updated.

Now It's Your Turn - Exercise

Now It's Your Turn!

Ask a Buyer a Question
In this exercise you will:

- Display an RFx
- Ask a Buyer a Question

To complete this exercise, please click this link.

click this link -
http://uperform.magic.ms.gov/ucontent/04724da43aa2430881ef868281cf3526_en-US/sim/html/sim_standard.htm

Knowledge Check

Knowledge Check

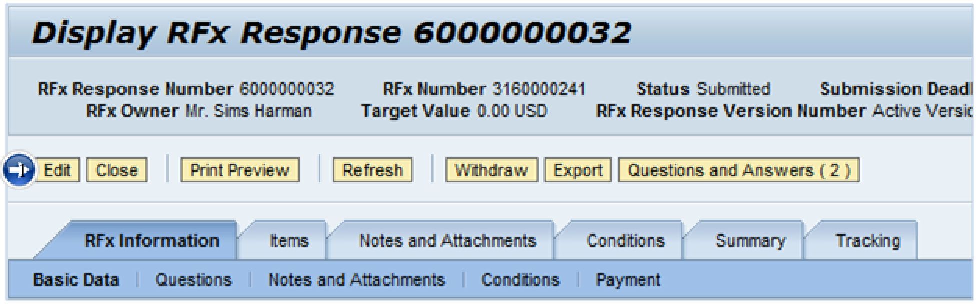
*Directions: Select the best answer to the question, and click **Continue** to submit your answer.*

True or False. You can only view the questions and answers in the RFx.

A True

B False

Change RFx Response



Change RFx Response

Click the Edit button to make changes to the RFx Response.

- Changes can be made to price, delivery time, and new attachments can be added.
- All versions of the RFx response can be accessed.

NOTE: Not all RFx Notifications allow for changes to the initial RFx Response.

1 -
Click **Edit** to make changes to the RFx Response.

Change RFx Response Details

Change RFx Response Details

When you have completed the changes to the RFx Response you must submit it for review by the State.

1 -

After making changes, click **Submit** to re-submit the RFx response.

Now It's Your Turn - Exercise

Now It's Your Turn!

Change an RFx Response
In this exercise you will:

- Display an RFx Response
- Edit an RFx Response

To complete this exercise, please click this link.

click this link -
http://uperform.magic.ms.gov/ucontent/911d581da4c046ac838b96ca7e8b3a43_en-US/sim/html/sim_standard.htm

Sample of RFx Award Letter

Notification for Rfx Response Number 6000000420

Created

State of Mississippi

MS IFORMATION TECHNOLOGY SERVICES
EASTWOOD DR.
JACKSON MS 39211

Date 01/08/2014

@DFA.MS.GOV

TEST VENDOR2
FIRST2 LAST2
123 STATE ST
JACKSON MS 39211

RE:6000000420, (1601-14-R-PREQ-00017)

Dear First2 Last2

On behalf of the State of Mississippi and the MS IFORMATION TECHNOLOGY SERVICES, I want to thank you for the solicitation response you submitted for **6000000420, (1601-14-R-PREQ-00017)**

The State has completed the review process and has recommended Test Vendor2 for award. It is important to note that the Intent to Award does not become final until the contract is executed.

Should you have any questions, please do not hesitate to contact me.

Sincerely,

Sample of RFx Award Letter

Should you be selected to provide the product or service you will receive an award letter.

- Letter of intent will be e-mailed to company
- Letter of intent is not final until a contract is executed

Lesson 3: Purchase Order

Lesson 3: Purchase Order

This lesson will explain:

- Display Purchase Orders
- Print Purchase Orders

View Purchase Orders

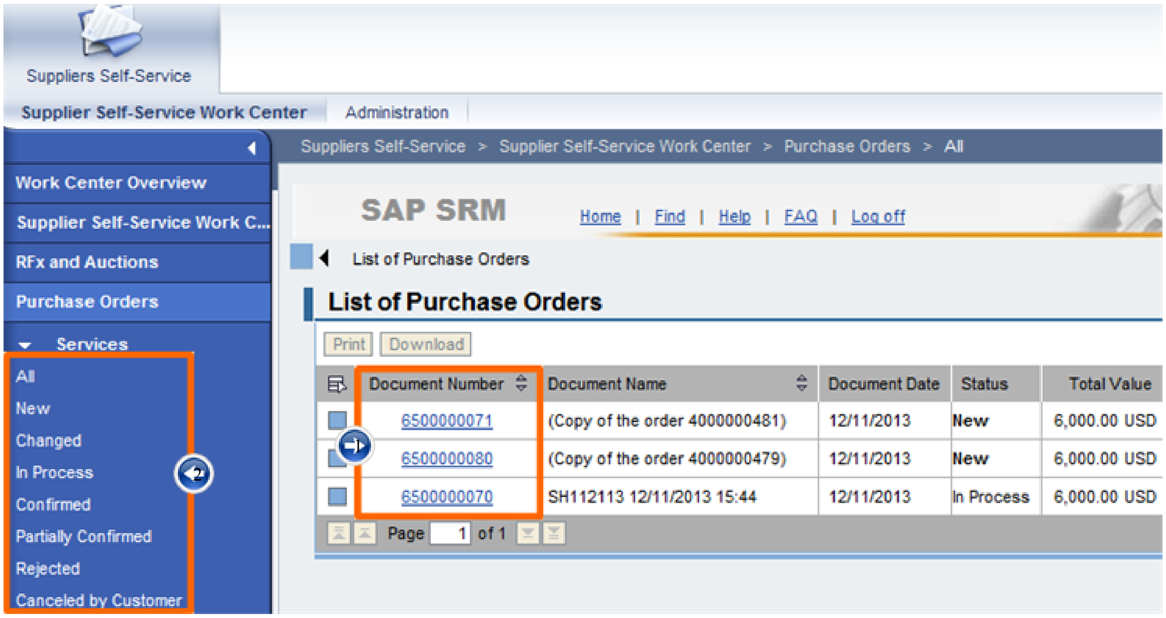
View Purchase Orders

You can view the purchase order but cannot make any changes.

1 -

Select **Purchase Orders** to view a list of Purchase Orders.

View Purchase Orders



View Purchase Orders

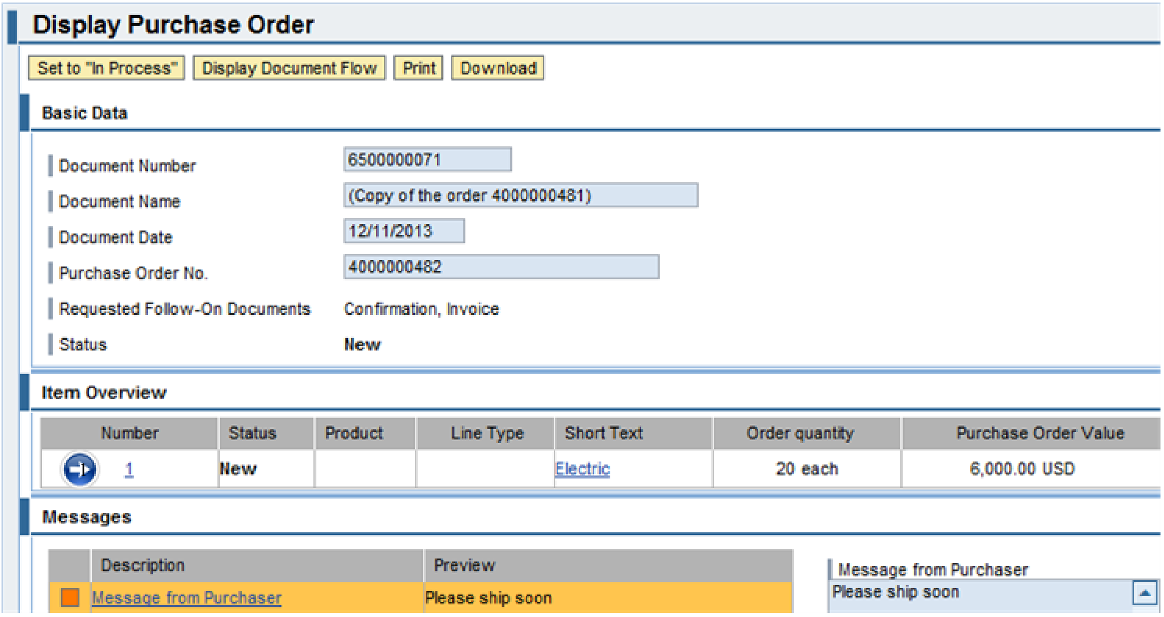
All purchase orders for a supplier display as a default. Filter the list by selecting a status.

1 -
Click a **Document Number** to view the Purchase Order.

2 -

Select a status to filter the results list.

View Purchase Orders



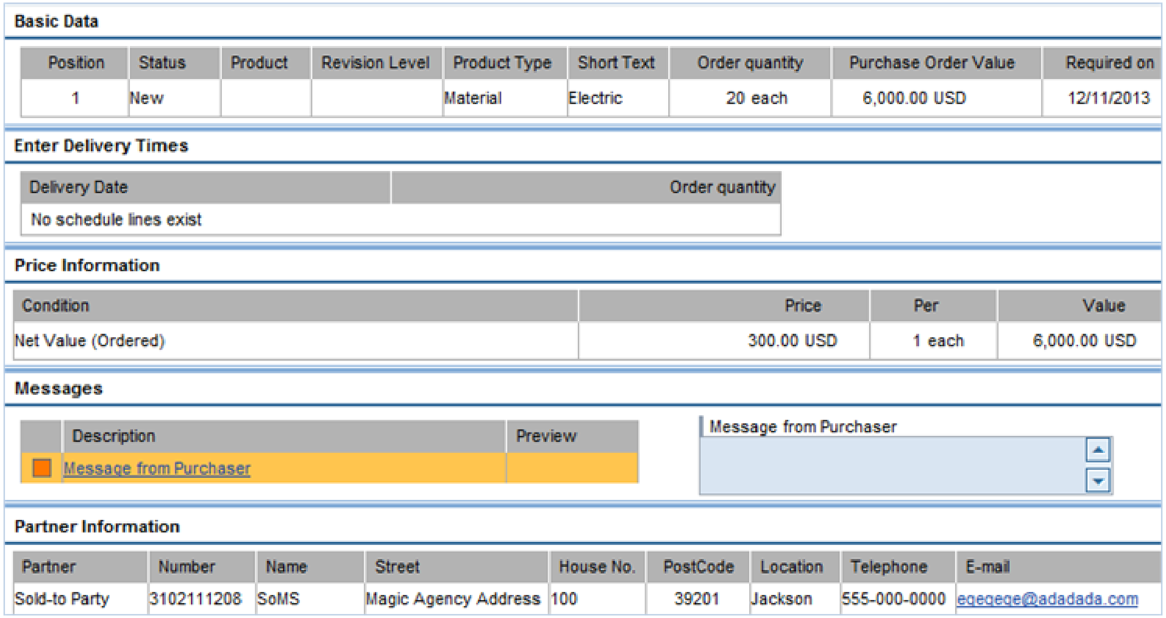
View Purchase Orders

You can view details of the purchase order. Scroll down to view all of the information.

1 -

Click a line item in the **Item Overview** section to view item details.

View Purchase Orders Line Item Details



Basic Data

Position	Status	Product	Revision Level	Product Type	Short Text	Order quantity	Purchase Order Value	Required on
1	New			Material	Electric	20 each	6,000.00 USD	12/11/2013

Enter Delivery Times

Delivery Date	Order quantity
No schedule lines exist	

Price Information

Condition	Price	Per	Value
Net Value (Ordered)	300.00 USD	1 each	6,000.00 USD

Messages

	Description	Preview
	Message from Purchaser	

Message from Purchaser

Partner Information

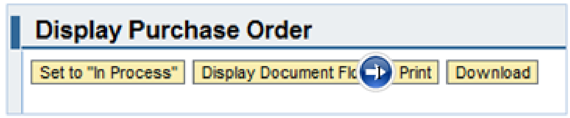
Partner	Number	Name	Street	House No.	PostCode	Location	Telephone	E-mail
Sold-to Party	3102111208	SoMS	Magic Agency Address	100	39201	Jackson	555-000-0000	egegege@adadada.com

View Purchase Order Line Item Details

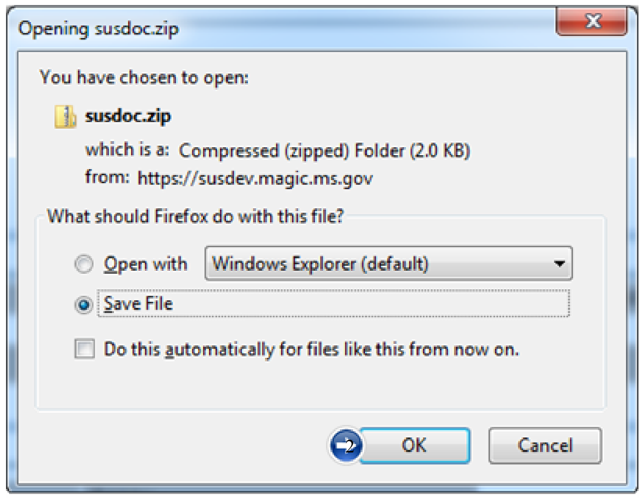
All information on this screen applies only to the line item selected.

Print or Download Purchase Order

Print or Download Purchase Order



Both Print and Download functions are available.



1 -

You can select Print to print your document or Download to save your Document on your computer.

2 -

With either selection, Print or Download, a prompt displays. Select Open with or Save File and Click OK.

Now It's Your Turn - Exercise

Now It's Your Turn!

Print a Purchase Order
In this exercise you will:

- Display a Purchase Order
- Print a Purchase Order

To complete this exercise, please click this link.

click this link -
http://uperform.magic.ms.gov/ucontent/ad23195bc0fd4e2f8144bd22345952b8_en-US/sim/html/sim_standard.htm

Knowledge Check

Knowledge Check

Directions: Select the best answer to the question, and click ***Continue*** *to submit your answer.*

Which of the following statuses may be used to display purchase orders?

A Confirmed

B New

C In Process

D Rejected

E All of the Above

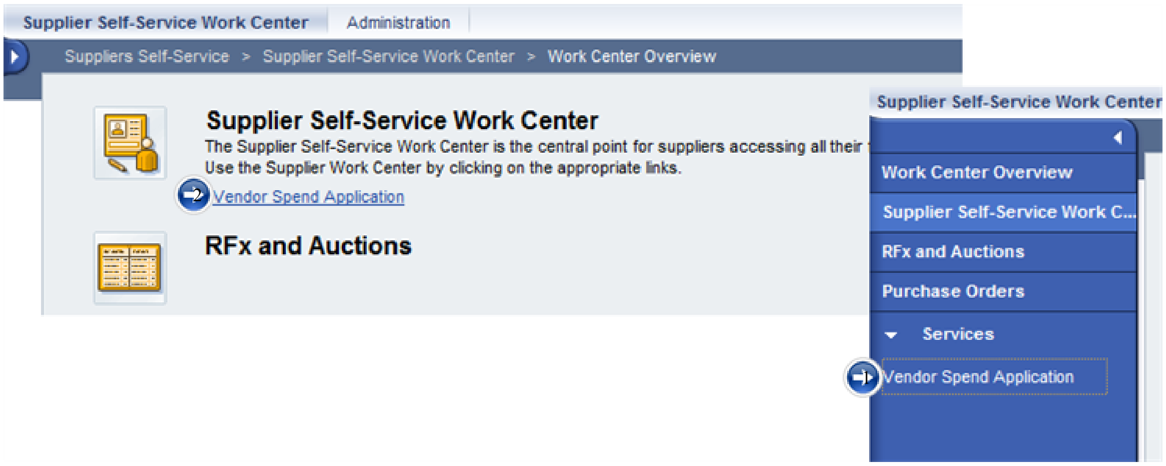
Lesson 4: Vendor Spend Report

Lesson 4: Vendor Spend Report

This lesson will explain:

- Vendor Spend Report

Vendor Spend Application



Vendor Spend Application

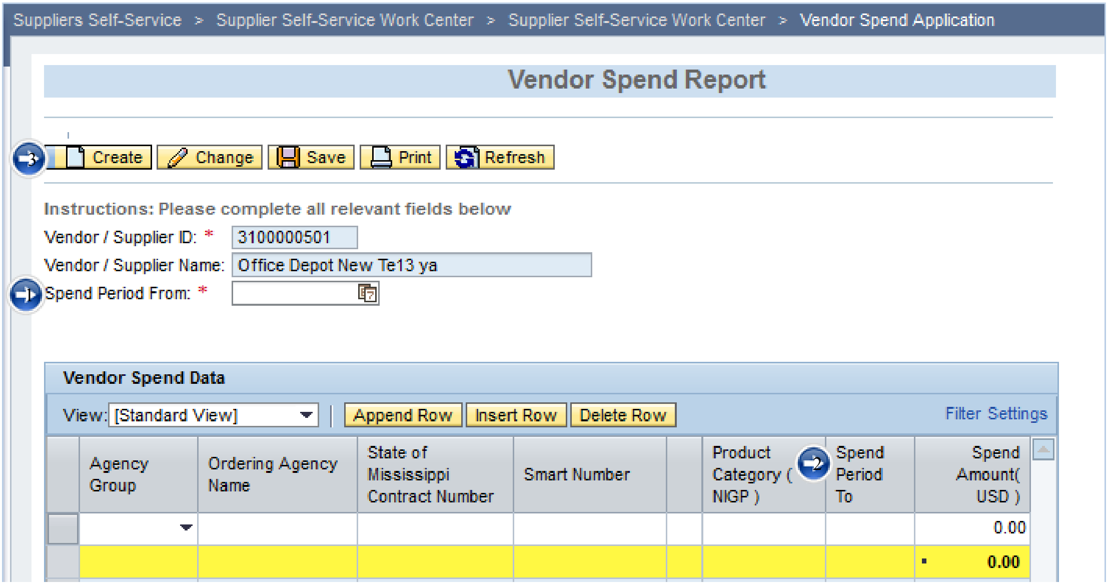
This provides a report of a supplier's spend period and amount based on the ordering agency name and SoMS contract number.

1 -
Click the **Vendor Spend Application** link to view report selections.

2 -

In Supplier Self-Service Work Center, select the **Vendor Spend Application** link to view report selections.

Vendor Spend Application



Vendor Spend Application

Complete the fields to select the Spend Period From date, the Agency Group, Ordering Agency Name, Contract Number, Product Category, and Spend Amount.

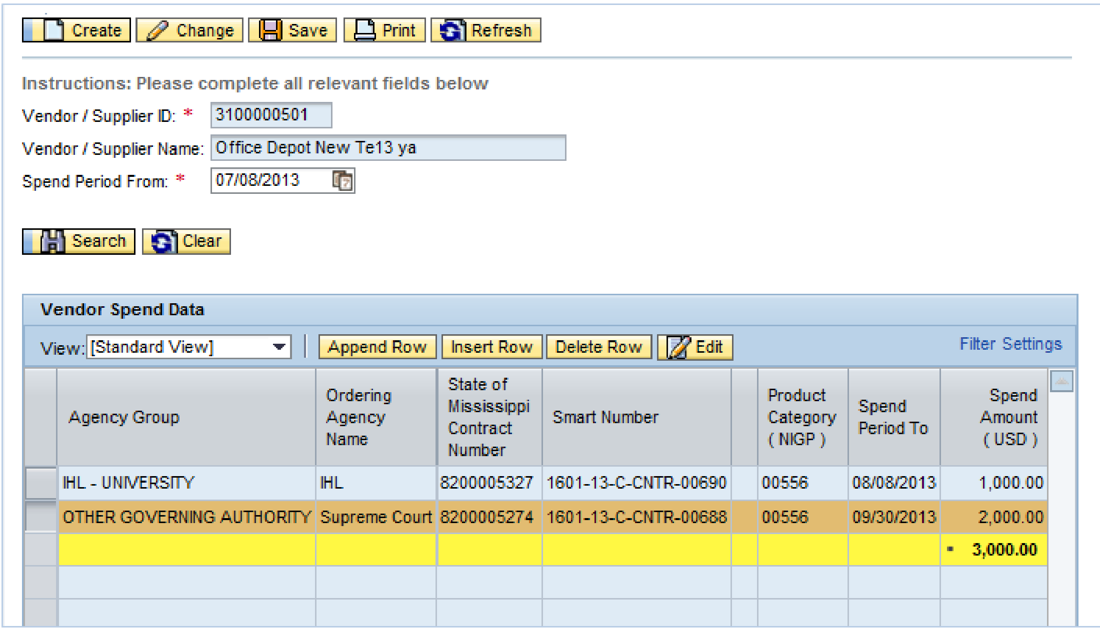
1 -
Select a **Spend Period From** date.

2 -

Enter Spend Data based on the same **Spend Period From** date.

3 -You can create, change, save, print a report or refresh the screen. Refresh the fields to re-enter a new **Spend Period From** date.

Vendor Spend Application



Vendor Spend Application

Above is an example of the fields populated.

Now It's Your Turn - Exercise

Now It's Your Turn!

Create a Vendor Spend Report
In this exercise you will:

- Create a Vendor Spend Report

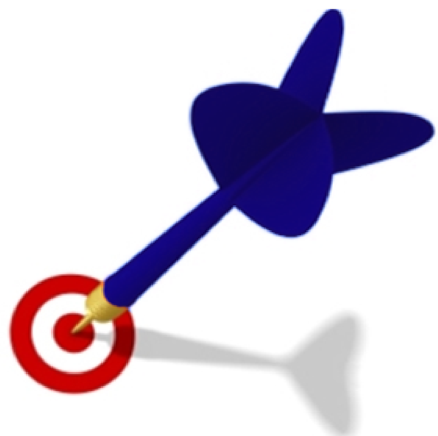
To complete this exercise, please click this link.

click this link -

http://uperform.magic.ms.gov/ucontent/7422ca4344c3454da1552600d3ed0fdf_en-US/sim/html/sim_standard.htm

Course Summary

Course Summary



This course is complete. You should now be able to:

- Explain Supplier Self-Service Activities
- Maintain Company Data
- Maintain Own Data (Admin)
- Create Contact Persons
- Display RFx Documents
- Manage RFx Responses
- Display and Print Purchase Order
- Report on Vendor Spend Data

Support Information

Support Information

Please go to the MMRS website for the latest Customer Support information.