



iSupplier User's Guide

Forms and Guidelines

- [iSupplier Naming Convention Guide](#) (PDF)
- [Form W-9 Request for Taxpayer Identification Number and Certification](#) (PDF)
Form W-9 must be completed and submitted to Department of Contracting and Purchasing prior approval of registration.
- [California Form 590 Withholding Exemption Certificate](#) (PDF)
- [Independent Contractor Questionnaire](#) (PDF)
- [City of Oakland Required Business Tax License Guidelines](#)

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Introduction

The City of Oakland has upgraded its Procurement system by implementing new software called Oracle **iSupplier** by. Oracle. This User's Guide is intended to help suppliers understand and use this new system.

iSupplier portal is the internet interface by which suppliers can view their purchase orders, deliveries, invoices, and payment status. This system also allows the City of Oakland to send suppliers electronic notification of bid opportunities for the commodity categories the suppliers have indicated on their supplier profiles.

iSupplier portal is a completely electronic interface. No special software, aside from an up-to-date web browser such as Microsoft's Internet Explorer, is required to access this system.

The following conventions are used in this Guide:

[Links](#)

Clicking a link will take you to another location or drill down to other information


[Buttons]

Clicking a button will perform an operation

Registering in the iSupplier System

A link to the URL for new suppliers can be found by going to www.oaklandnet.com.

1. Click on the link "[Doing Business with the City of Oakland](#)", which will bring you to the proper page.
2. Click on the link "[Register New Supplier](#)", which will take you to the registration page.
3. Enter your company details. Field names that have an asterisk ("*") are mandatory fields and must be completed in order to register.
4. Please be sure to use the "[iSupplier naming convention](#)" guide to enter your business name.
5. Click **[Register]** after completing all fields. Your company's detailed information will be submitted to the City of Oakland for approval.


Close

Supplier Registration

Please enter the details for your company and then press **Register** to submit your request. At least one tax id is required to complete the registration.

* Indicates required field

Company Details

Enter the details for your company and provide an address that is suitable for receiving RFQ documents.

<p style="margin: 0; font-size: x-small;">* Company Name <input style="width: 90%;" type="text"/></p> <p style="margin: 0; font-size: x-small;">* Taxpayer ID <input style="width: 80%;" type="text"/></p> <p style="margin: 0; font-size: x-small;">Tax Registration Number <input style="width: 70%;" type="text"/></p> <p style="margin: 0; font-size: x-small;">DUNS Number <input style="width: 70%;" type="text"/></p>	<p style="margin: 0; font-size: x-small;">* City/Town/Locality <input style="width: 90%;" type="text"/></p> <p style="margin: 0; font-size: x-small;">County <input style="width: 90%;" type="text"/></p> <p style="margin: 0; font-size: x-small;">* State/Region <input style="width: 90%;" type="text"/></p> <p style="margin: 0; font-size: x-small;">Province <input style="width: 90%;" type="text"/></p> <p style="margin: 0; font-size: x-small;">* Postal Code <input style="width: 80%;" type="text"/></p>
--	--

* Address Name

Provide a suitable nickname for the address.

Country United States

* Address

Note

Note to Approver

Include any additional details about the address (such as the type of address) that will be useful to the registration approver.

User Details

Enter user's personal information.

<p style="margin: 0; font-size: x-small;">* Email Address <input style="width: 90%;" type="text"/></p> <p style="margin: 0; font-size: x-small; color: #000080;">Your email address will be your UserID for the system.</p> <p style="margin: 0; font-size: x-small;">* First Name <input style="width: 80%;" type="text"/></p> <p style="margin: 0; font-size: x-small;">* Last Name <input style="width: 80%;" type="text"/></p>	<p style="margin: 0; font-size: x-small;">* Phone Number <input style="width: 90%;" type="text"/></p> <p style="margin: 0; font-size: x-small;">Phone Extension <input style="width: 80%;" type="text"/></p>
--	--

Register

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Close
Privacy Statement

Before the City of Oakland can approve your supplier registration your company must fill in and submit by fax, email or mail the following forms:

- [Form W-9 Request for Taxpayer Identification Number and Certification](#) (PDF)
- [California Form 590 Withholding Exemption Certificate](#) (PDF)

When approved, you will receive an email confirmation with your iSupplier username and password.

Future changes to your business' profile will require approval by the City of Oakland. You will receive an email confirmation of such approvals.

<p>Form W-9 (Rev. October 2007) Department of the Treasury Internal Revenue Service</p>	<p>Request for Taxpayer Identification Number and Certification</p>	<p>Give form to the requester. Do not send to the IRS.</p>
<p>Print or type See Specific Instructions on page 2.</p>	<p>Name (as shown on your income tax return)</p> <p>Business name, if different from above</p> <p>Check appropriate box: <input type="checkbox"/> Individual/Sole proprietor <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ <input type="checkbox"/> Exempt payee <input type="checkbox"/> Other (see instructions) ▶</p> <p>Address (number, street, and apt. or suite no.) Requester's name and address (optional)</p> <p>City, state, and ZIP code</p> <p>List account number(s) here (optional)</p>	
<p>Part I Taxpayer Identification Number (TIN)</p> <p>Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see <i>How to get a TIN</i> on page 3.</p> <p>Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.</p>		
		<p>Social security number</p> <p>OR</p> <p>Employer identification number</p>
<p>W9 Form</p>		

<p>YEAR</p> <p>20 <input type="text"/> <input type="text"/></p>	<p>Withholding Exemption Certificate</p> <p>(This form can only be used to certify exemption from nonresident withholding under California R&TC Section 18662. This form cannot be used for exemption from wage withholding.)</p>	<p>CALIFORNIA FORM</p> <p>590</p>
<p>File this form with your withholding agent. (Please type or print)</p>	<p>Withholding agent's name</p>	
<p>Vendor/Payee's name</p>	<p>Vendor/Payee's <input type="checkbox"/> Social security number <input type="checkbox"/> S.O.S. no. <input type="checkbox"/> California corp. no. <input type="checkbox"/> FEIN</p>	<p>Note: Failure to furnish your identification number will make this certificate void.</p>
<p>Vendor/Payee's address (number and street)</p>	<p>APT no. Private Mailbox no. Vendor/Payee's daytime telephone no.</p>	<p>()</p>
<p>City State ZIP Code</p>		
<p>I certify that for the reasons checked below, the entity or individual named on this form is exempt from the California income tax withholding requirement on payment(s) made to the entity or individual. Read the following carefully and check the box that applies to the vendor/payee:</p>		
<p><input type="checkbox"/> Individuals — Certification of Residency: I am a resident of California and I reside at the address shown above. If I become a nonresident at any time, I will promptly inform the withholding agent. See instructions for Form 590, General Information D, for the definition of a resident.</p>		
<p><input type="checkbox"/> Corporations: The above-named corporation has a permanent place of business in California at the address shown above or is qualified through the California Secretary of State to do business in California. The corporation will withhold on payments of California source income to nonresidents when required. If this corporation ceases to have a permanent place of business in California or ceases to be qualified to do business in California, I will promptly inform the withholding agent. See instructions for Form 590, General Information E, for the definition of permanent place of business.</p>		
<p>California Form 590</p>		

****Important Note:** If you get a message saying that you are already a supplier with the City of Oakland, you will need to contact the Department of Contracting and Purchasing at isupplier@oaklandnet.com or (510) 238-3970, and they will send you a username and password to begin using the iSupplier system.

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Logging in to the iSupplier Portal

A link for existing suppliers can be found by going to www.oaklandnet.com.

1. Click on the link "[Doing Business with the City of Oakland](#)", which will bring you to the proper page.
2. Click on the link "[Existing iSupplier Customers Sign in Here](#)".

The first time you log in, you will need the username and password that was sent to you by the City of Oakland in the email confirming your registration.

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Password Maintenance

You will be required to change your password the first time you log in. The password requirements are:

- Password must be at least 8 characters long.
- Password must contain at least one letter and at least one number.
- Password can not contain the username.
- Password can not contain consecutively repeating characters.
- Password is case sensitive.



Password Change Screen

To change the password, do the following:

1. Enter old password.
2. Enter new password.
3. Repeat password entry.
4. Click **[Apply]** to save your changes.

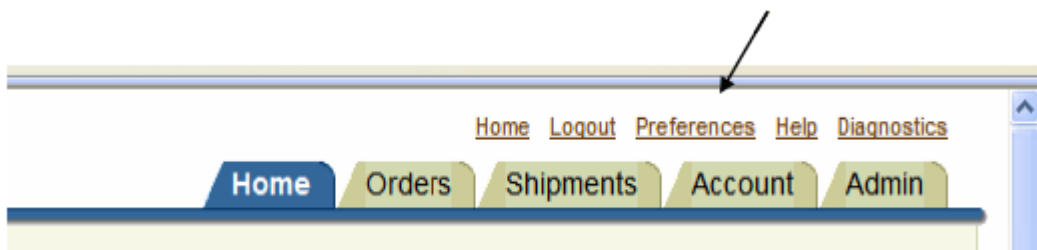
****Important Note:** Your account will be locked after 5 failed tries to log in. If this happens, please email the Oracle Manager at oraclemanager@oaklandnet.com to have your account unlocked.

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Managing User Preferences

Setting up User Preferences

Change your user settings or preferences at any time by using the [Preferences](#) link on the iSupplier Home Page.



User Preferences Link

Preferences Page

Change the following preferences from this page as needed:

General and Regional:

Select your language, territory, time zone, date and number formatting, client character encoding (character set used in your page display), and accessibility features (such as screen reader use).

Notification:

Select how you want to receive your notifications (for example, in HTML or plain text e-mail).

City of OAKLAND California
E-Business Suite

Home Logout Preferences Help

Home Orders Shipments Account Admin

General
• Display Preferences
• Access Requests

General Preferences

Cancel Reset to Default Apply

Languages

Current Session Language American English ⓘ
Default Application Language American English ⓘ

Accessibility

Accessibility Features None ⓘ

Regional

Territory United States
Date Format dd-MMM-yyyy (26-Jan-2009)
Timezone
Number Format 10,000.00
Currency US dollar
Client Character Encoding Western European (Windows) ⓘ

Change Password

Known As fhuang@yahoo.com
Old Password
New Password
Repeat Password

Start Page

Responsibility Page

Notifications

Email Style HTML mail with attachments ⓘ
Notifications will be sent in your current default language, American English.

Cancel Reset to Default Apply

Home | Orders | Shipments | Account | Admin | Home | Logout | Preferences | Help

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Preferences Page

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Using iSupplier Tabs

iSupplier Tabs are available on every screen, and help you navigate to the various data screens. The relevant information from each tab is explained in detail later in this Guide.

- **Home:** Takes you back to the homepage.
- **Orders:** Takes you to your POs and RFQs.
- **Shipments:** View a summary of your delivery schedules, past receipts, returns, historical delivery performance, and create Advanced Shipping Notices.
- **Account:** View the status of invoices and payments.
- **Admin:** Update your supplier and contact information. (**This tab is very important and should be setup first)

Home Page Features

DRACLE[®] iSupplier Portal

Home Logout Preferences Help Diagnostics

Home Orders Shipments Account Admin

Search PO Number

Notifications

Subject	Date
No results found.	

Orders At A Glance

PO Number	Description	Order Date
1005072	Sign shop inventory	29-Jul-2008 09:32:15
1001015	Standard, PC63279, HQ, ends 12/31/10, Plastic Pavement Marking Materials (3M)	29-Jul-2008 09:19:01
1004818		22-Jul-2008 09:31:18
1004770		21-Jul-2008 09:47:32
1004271	SHEETING PERFORATED PRESSURE SENSITIVE HI-INTENSITY 30 IN WIDE X 50 YD ROLL SILVER, sign shop inventory	08-Jul-2008 09:55:04

Shipments At A Glance

Shipment Number	Shipment Date	Packing Slip
No results found.		

Home | Orders | Shipments | Account | Admin | Home | Logout | Preferences | Help | Diagnostics

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iSupplier Home Page

You can click on the information displayed on the iSupplier Home Page to drill down to recent data and information related to Orders, Shipments, Receipts, and Payments. Use the Quick-Links at the right of the screen to link directly to desired functions. The percent sign (%) is used as the wildcard character in any search field within this application.

Notifications

Notifications are messages waiting for your review. Some notifications are view-only, while other notifications require action. To view your notifications, click the linked subject to open the Notification Details page.

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Administration (Admin) Tab

The screenshot shows the Oracle iSupplier web application in Internet Explorer. The browser title is "Supplier Details - Windows Internet Explorer". The address bar shows the URL: http://water.oaklandnet.com:8033/OA_HTML/OA.jsp?page=/oracle/apps/pos/profile/webui/SupDetailsPG&_ri=177&OASF=F. The page features a navigation menu with tabs: Home, Orders, Shipments, Negotiations, Planning, Account, Product, and Admin. The Admin tab is highlighted in blue. A red arrow points to the Admin tab with a text box that says "This is the Admin Tab".

The main content area is titled "Profile Management" and includes a "Warning" message: "Low-level logging is currently enabled. Your application will not perform as well while low-level logging is on." Below this is the "Supplier Details" section with the following information:

Supplier Name	We Do Demo
Supplier Number	89544
Taxpayer ID	321654987
Tax Registration Number	
DUNS Number	

There is also a "New to Supplier Profile Management?" section with a "Learn more..." link. Below the supplier details is a "Search" section with a text input field and a "Go" button. At the bottom, there is an "Attachments" section with a table header:

File Name	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

The footer of the page contains navigation links: Home | Orders | Shipments | Negotiations | Planning | Account | Product | Admin | Home | Logout | Preferences | Help. Copyright (c) 2006, Oracle. All rights reserved. Privacy Statement

Administration Tab

Supplier Details

View your company information.

The following links are located on the left side of the Admin Page.

Address Book

View your address information and make updates if needed.

To change your company address, do the following:

1. Review your company address information.
2. If needed, click on the **Edit** icon.
3. Make applicable edits.
4. Click **[Apply]**.
5. Receive confirmation that your address has been changed.

Contact Directory

View your contact information and make updates if needed.

1. Review your contact information.
2. If needed, click on the **Edit** icon.
3. Make applicable edits.
4. Click **[Apply]**
5. Receive confirmation that your contact information has been changed.

Business Classifications

This section displays the vendor's business classification information. Identify the classifications that apply to your company. This section also displays the certification application questionnaires for vendors that wish to be certified with the City of Oakland as a Local Business Enterprise (LBE) or Small Local Business Enterprise (SLBE).

To add or update your Business Classification, do the following:

1. Click on the [Business Classification](#) link.
2. Enter your business classification information. Complete all fields.
3. Click **[Save]**.
4. Receive a confirmation message.

Products and Services

This section displays the vendor's products and services that are registered in the iSupplier system. By registering products and services, your company will be electronically notified when the City of Oakland is in need of those products or services, and you will have an opportunity to submit a quote.

Construction services suppliers and professional services suppliers select the products and service offerings using the **North American Industry Classification System (NAICS)*** code and for commodity suppliers, the **National Institute of Governmental Purchasing (NIGP)*** code descriptions, which is a descriptive/numeric system used for identifying products and services. The City of Oakland utilizes this system for vendor registration and bid solicitation purposes. It is best to select your products and service at the sub category level.

***Important Note:** This copy of the NIGP Code is the copyrighted property of the National Institute of Governmental Purchasing, Inc., is licensed through Periscope Holdings, Inc., and is protected under the copyright laws of the United States. Unauthorized download, duplication or copying is prohibited.

The screenshot displays the iSupplier Portal interface. At the top, there is a navigation bar with links for Home, Orders, Shipments, Account, and Admin. Below this is a 'Profile Management' section with a sidebar menu containing links for Supplier Details, Address Book, Contact Directory, Business Classifications, Products and Services (highlighted), Bank Accounts, and User Accounts. The main content area is titled 'Products and Services' and features an 'Add' button. Below the button is a table with the following structure:

Select Products and Services	Effective Date	View Sub-Category
No results found.		

A red arrow points from a red-bordered box with the text 'Use the add button to browse the Products and Services' to the 'Add' button. At the bottom of the page, there is a footer with copyright information and a privacy statement link.

Products and Services Page

To add your company's products and services, do the following:

1. Click **[Add]** to add and view sub-categories.
2. Enter the name of the service or product. You can also enter a partial name of the service or product using the % wildcard character (i.e. %tire%)
3. Click **Go** and review the results.
4. Select the proper service or product by clicking on the **Applicable** box for all items that you want to add, and then click **Apply**.
5. You will receive a confirmation message that the service or product has been added to your profile.

Select the applicable Product and Services.

- Click **[Apply]**.
- Receive a confirmation that the Product and Services were added to your profile.

User Accounts

This section displays users from your company that have access to the iSupplier portal.

If you need to add or delete a user, contact the Department of Contracting and Purchasing at isupplier@oaklandnet.com or (510) 238-3970.

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Orders Tab

This section displays the most recent purchase orders the City of Oakland has issued to your company. Click on the [Purchase Order Number](#) link to drill down to order detail from this window.

Purchase Order Detail

Drill down from the **Orders-At-A-Glance** window to view links to your purchase orders. Note the Orders tab is automatically designated – use this window to view the details of the purchase order.

Click on the **Home** tab to return to the iSupplier Home Page.

Using Orders Page for reviewing purchase order details

Clicking on the **Orders** tab brings you to the Orders Page. Automatic retrieval of the most recent 25 purchase orders, in summary form is shown if they exist.

City of OAKLAND California
iSupplier Portal

Home Logout Preferences Help

Home **Orders** Shipments Negotiations Account Admin

Purchase Orders Work Orders Agreements Purchase History RFQ Deliverables Timecards

Purchase Orders

Export

Views

View Purchase Orders Within Last 6 Months Go Advanced Search

Select PO Number	Rev	Business Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
No results found.											

Export

Home | Orders | Shipments | Negotiations | Account | Admin | Home | Logout | Preferences | Help

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Purchase Orders Page

To review or export all your City of Oakland purchase order data, do the following:

1. Click on the **[Export]** to export into Excel format for printing and review if needed.
2. Click **[Open]**.
3. Review spreadsheet information as needed. Return to iSupplier Orders page by minimizing window.

Purchase Order Search Options

- Open drop-down window to select from other pre-defined views of purchase order data. Select "**All Purchase Orders**" from list and click **[Go]**.

Note the summary information provided for each purchase order.

- Click on the individual [PO Number](#) link to access purchase order information.

Purchase Order Information

- Review purchase order detail – you can **[View Change History]** to drill down to PO change history from this point on screen, or use [Related Information](#) links for receipts, invoices, and payments as applicable.
- Scroll down screen to review detail PO information, and use the [Details](#) link to access and show shipment detail information.
- Review additional shipment detail information – use the [Ship-to-Location](#) link for further drill down if needed.

City of Oakland Purchase Agreements

- Use the **Agreements** region on the Orders page to access agreement information. Enter Agreement (PO) number.
- Click **[Go]** to retrieve record.
- Note the summary information related to agreement listed. To view detail, click on the [Agreement](#) (PO Number) link.

Agreement and Release Details

- Note detail information related to agreement.
- Note Releases listing for agreement. You can drill down to release PO information through [PO Number](#) (Release) link.

Purchase Order Revisions

View all revisions for purchase orders.

- Enter PO Number and Click **[Go]** to execute query.
- Note summary information for PO retrieved. Links are available to [PO](#), [Buyer](#), and [Ship-To Information](#).
- Click on **Show all PO Changes** to review all revisions to purchase order.

PO Comparison Results

- Use this window to view all PO revisions by Revision Number and lines. Note detail on fields altered, including From / To values.
- Or use buttons to compare revisions to Original PO or Previous PO if more than one revision PO exists.

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Shipments Tab

Utilize the iSupplier Shipments Page to access all City of Oakland shipment information.

The screenshot displays the 'Shipments' tab in the iSupplier application. At the top, there is a navigation bar with links for Home, Orders, Shipments, Negotiations, Account, and Admin. Below this is a secondary navigation bar with links for Delivery Schedules, Shipment Notices, Shipment Schedules, Receipts, Returns, Overdue Receipts, On-Time Performance, and Quality. The main content area is titled 'Delivery Schedules' and features a search interface. A red box highlights the 'Use Advanced Search Button' text, with a red arrow pointing to the 'Advanced Search' button. The search interface includes a 'Simple Search' section with input fields for Organization, Supplier Item, Due Date, and Item Number, along with 'Go' and 'Clear' buttons. To the right, there are input fields for PO Number, Item Description, and Ship-To Location. Below the search fields is a table with the following columns: Organization, PO Number, Supplier Item, Item Description, UOM, Quantity Ordered, Quantity Received, Ship-To Location, Carrier, Item Number, Supplier Config ID, Supplier, Supplier Location, and Due Date. The table currently shows 'No search conducted.' at the top. At the bottom of the page, there is a footer with copyright information and a Privacy Statement link.

Shipments Pages (Advanced Search Function)

Receipt Transactions

- Use the search criteria, or click **[Go]** to execute full query.
- Receipt information is retrieved, shown in summary form. Links are available for drill down to [PO Number](#) and [Receipt Number](#).
- Click on [Receipt Number](#) link to view additional receipt information.

Shipments Page – Returns

To investigate City of Oakland returns, use the Returns Summary window for query and analysis of return transactions. This window enables you to view return history, cause for returns, and includes additional basic information concerning the transaction.

- You can use additional criteria for searching on return transactions. To see all return transactions, click **[Go]**.
- Return transaction data (if it exists) will be displayed in summary form.

The return information displayed includes RMA Number, return quantity and date, and return reason. [Receipt Number](#) and [PO](#) links are available for drill down.

Shipments Page – Overdue Receipts

Use the Overdue Receipts window for queries on items shipped by you but not received by the City of Oakland.

- Note the standard fields for query.
- Use the **[Advanced Search]** function to enter additional / different criteria.
- Use Due Date field to query all overdue shipments after a specific date.
- Click **[Go]** to execute the query.
- Review the information related to shipment and due date, and other data. Drill down via the links to [PO](#), [Ship-To](#) or [Buyer](#) detail if desired.

Shipments Page – On-Time Performance

The On-Time Performance window provides the delivery status of timely shipments you have made against purchase orders. You can view performance data for timeliness of deliveries.

- Note the multiple criteria for basic search – use the criteria to narrow the search if applicable.
- Click **[Go]** to execute search.

Performance Information

- View summary information, including Due Date and Receipt Date for each transaction. Drill down via [PO](#) link as needed.

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Account Tab

Account Page – View Invoices

- Use the View Invoices search screen to find invoice information for processed invoices.

Invoice Search

- Enter search criteria using listed fields. Use **[Advanced Search]** for additional query fields.
- Click **[Go]** to execute search.

Invoice Summary

- Review summary invoice information. Note Status column for invoices On Hold. Note Payment Number column for paid invoice information.
- To review invoice with Status of “On Hold” click on the [On Hold](#) link to drill down to hold detail information.

Invoice Payment Information

- Review invoice payment information by clicking on [Check](#) link.
- Review payment information – note [Invoice Number](#) cross-reference link at bottom of screen.

View Payments

- Use the View Payments Window to view payment information related to City of Oakland invoices.
 - Search criteria are used for payment queries.
 - Click **[Advanced Search]** to search by Invoice Number.

Query by Invoice Number

- Enter Invoice Number.
- Click **[Go]** to execute search.

Query Results and Payment Detail

- Review results of query - summary payment information. Click on [Payment](#) link to access payment detail information.
- Review payment information – note [Invoice Number](#) cross-reference at bottom of screen.

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