Black Hills
PeopleSoft v9.2
Supplier Portal
Supplier and Bidder
Reference Guide

May 2020
## DOCUMENT HISTORY

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</tr>
</tbody>
</table>


# TABLE OF CONTENTS

1.0 OVERVIEW .................................................................................................................. 5
   1.1 Background Information on the Supplier Portal ...................................................... 5
   1.2 Supplier Portal System Access ................................................................................. 5

2.0 SUPPLIER PORTAL FUNCTIONALITY ........................................................................ 7
   2.1 Public vs. Secure Supplier Portal ............................................................................. 7
   2.2 Public Supplier Portal Functionality .......................................................................... 7
   2.3 Secure Supplier Portal Functionality ......................................................................... 14
   2.4 General Navigation .................................................................................................. 16
   2.5 Multi-Factor Authentication (MFA) .......................................................................... 19
   2.6 Forgot Password Processing ..................................................................................... 25

3.0 REGISTER AS A BIDDER ............................................................................................. 31
   3.1 Register as a Bidder .................................................................................................. 31

4.0 REGISTER AS A SUPPLIER ......................................................................................... 46
   4.1 Register as a Supplier ............................................................................................... 46

5.0 REGISTER AS A NEW USER FOR AN EXISTING SUPPLIER .................................. 59
   5.1 Register as a New User ............................................................................................ 59

6.0 PERFORM A SUPPLIER CHANGE REQUEST .......................................................... 63
   6.1 Supplier Change Request ......................................................................................... 63

7.0 REVIEW TRANSACTIONS WITH BLACK HILLS ....................................................... 74
   7.1 My Preferences ....................................................................................................... 74
   7.2 Purchase Orders ....................................................................................................... 76
   7.3 POs with Overdue Shipments .................................................................................. 79
   7.4 Receipts .................................................................................................................. 82
   7.5 Invoice Inquiry ....................................................................................................... 84
   7.6 Payment Inquiry ..................................................................................................... 86
   7.7 Bidding Opportunities ............................................................................................ 88
   7.8 My Event Activity ................................................................................................... 94
   7.9 Awarded Events ...................................................................................................... 96

8.0 SUPPLIER PORTAL ADMINISTRATIVE FUNCTIONS ............................................... 98
   8.1 Manage Profile – Update Profile .............................................................................. 98
1.0 OVERVIEW

1.1 Background Information on the Supplier Portal

Black Hills has re-deployed the PeopleSoft Supplier Portal with additional functionality activated in order to facilitate increased Supplier engagement and self-service. The Supplier Portal provides suppliers with an intuitive, easy to use system that supports their interactions with Black Hills. Suppliers can check on orders, respond to proposals, and check on the status of invoices and payments. They can also request changes to their Supplier record. Bidders can register so they can respond to Requests for Proposals they have been invited to.

This Supplier Portal Reference Guide is designed to provide Suppliers and Bidders with the information required to understand and use the functionality and features available in the Supplier Portal. We will also discuss the procedures and business rules you should keep in mind as you start to work in this system.

1.2 Supplier Portal System Access

The Supplier Portal system in the PROD environment is accessed via the Black Hills Corporate website. Follow this link https://www.blackhillsenergy.com/services/become-supplier-and-contractor to reach the Supplier Portal in order to view general information about transacting with Black Hills and to register as a Bidder.
A Supplier or Bidder can also access the Supplier Portal directly via the following link once they have been set up in the system with a valid User Id and Password:

https://supplier.blackhillscorp.com

*Tip:* For Performance reasons, you are encouraged to use either an Edge or Chrome Browser rather than the Internet Explorer Browser.
2.0 SUPPLIER PORTAL FUNCTIONALITY

2.1 Public vs. Secure Supplier Portal

The Supplier Portal has two views associated with it. One is known as the Public Supplier Portal, and one is known as the Private, or Secure Supplier Portal. The Public view is where you are first taken when you access the Supplier Portal. There are a number of Tiles available that when clicked provide applicable information as described on the Tile. From this view, a User can click the Sign In Tile to sign into the Private Supplier Portal. Once logged in, the User can see information directly pertinent to the Supplier or Bidder they are associated with.

2.2 Public Supplier Portal Functionality

The Public Supplier Portal provides the initial view of the Supplier Portal and is comprised of a series of Tiles that provide general information regarding usage of the Supplier Portal.

![Supplier Public Home Page]

These Tiles are:

- Sign In
- Registration
- FAQs / Contact Us
- Announcements
- Events Calendar

Details regarding these Tiles follow.
The Sign In Tile allows a given user to login to the Private Supplier Portal, where they can view information specific to the Supplier or Bidder they are associated with.
The Registration Tile allows someone to register as a Bidder in the Black Hills Procurement system. Once registered and approved, a Bidder can receive invitations to bid on specific Requests for Proposal relevant to their business.
The FAQ Tile provides general information about the Supplier Portal and Black Hills including Who We Are, Registration information, and Support Questions. Additionally, Contact information is provided so that an individual can reach out to Black Hills for more information or support regarding the Supplier Portal.
Contact Us

If you have questions about how to use the various features of the Supplier Portal, please contact the Supplier Support Helpdesk at suppliersupport@blackhills corp.com
The Announcements Tile is updated periodically with relevant information for our Supplier base. Check it for the latest information regarding Procurement activities and Supplier impacts. Click the Announcement of interest to access the pop-up.
The Events Calendar Tile is also updated periodically with upcoming information that impacts our Suppliers and Bidders. Click the topic of interest to access the pop-up.
2.3 Secure Supplier Portal Functionality

**Supplier User**

Once a User logs in via the Sign In Tile accessed on the Public Supplier Portal view, they are granted access to a number of Tiles representing different types of transactions and information relevant to the Supplier they are associated with. They are now in the Secure Supplier Portal view.

These Tiles represent:

- Purchase Orders – Orders sent to a Supplier over a specified timeframe
- POs with Overdue Shipments – Orders that reflect overdue items
- Receipts – Shipments that have been received at Black Hills
- Invoice Inquiry – Invoice listing and status over a specified timeframe
- Payment Inquiry - Payment listing and status over a specified timeframe
- Bidding Opportunities – RFPs that the Supplier / Bidder is currently invited to bid on
- My Event Activity – All RFP activity between Black Hills and the Supplier / Bidder
- Awarded Events – RFPs that have been awarded to the Supplier
- Manage Profile – An Administrative Tile that allows the Supplier / Bidder to maintain their Profile
- Terms and Conditions – The Terms and Conditions applicable to doing business with Black Hills
- FAQs / Contact Us – Frequently Asked Questions about the Supplier Portal and how to contact us

Details regarding each of these Tiles will be presented later in this document.
**Bidder User**

Once a User logs in via the Sign In Tile accessed on the Public Supplier Portal view, they are granted access to a number of Tiles representing different types of transactions and information relevant to the Bidder they are associated with. They are now in the Secure Supplier Portal view.

![Secure Supplier Portal Tiles](image)

These Tiles represent:

- ✓ **Bidding Opportunities** – RFPs that the Supplier / Bidder is currently invited to bid on
- ✓ **My Event Activity** – All RFP activity between Black Hills and the Supplier / Bidder
- ✓ **Manage Profile** – An Administrative Tile that allows the Supplier / Bidder to maintain their Profile
- ✓ **Terms and Conditions** – The Terms and Conditions applicable to doing business with Black Hills

Details regarding each of these Tiles will be presented later in this document.
2.4 General Navigation

As we have shown, utilizing the Supplier Portal involves clicking appropriate Tiles that are displayed, and then navigating around the transaction that is presented. Here are some representative system screens for reference:
Menu Item

Menu Collapse

Function buttons

Menu Item

Update fields and Save.
Use links as needed.
2.5 Multi-Factor Authentication (MFA)

Authy is the Multi-Factor Authentication product that Black Hills is using to prevent unauthorized access to the Supplier Portal. This section details how Authy should be set up, followed by screenshots depicting how you will use it.

Authy provides MFA via the following methods:

- ✓ Phone call to your Mobile phone or Landline. You are provided with a code that you then key in to the Authy Verification page on the Supplier Portal.
- ✓ SMS Text Message to your Mobile phone. You are provided with a code that you then key in to the Authy Verification page on the Supplier Portal.
- ✓ Onetouch Authentication sent to the Authy App on your Mobile Phone from the Authy Verification page on the Supplier Portal. You then click an Approval button on the popup message you receive. This is the easiest method to use of the four.
- ✓ Entering a Token / PIN generated by the Authy App on your Mobile Phone into the Authy Verification page on the Supplier Portal.

This is what the various methods look like when they are presented to you:
**Authy Setup**

The first thing that you should do is download the Authy App to your Mobile phone, if you will be using it to assist you in accessing the Black Hills Supplier Portal. This way, the first time you get an SMS Text to your Mobile phone, the Black Hills Account will be loaded to your Authy App, setting you up for future Onetouch Authentication.

At this point, you fall into one of four Registration categories:

1. A new Supplier User with an existing Supplier Contact on the Supplier record in the Black Hills ERP system.
2. A new Supplier User without a Supplier Contact on the Supplier record in the Black Hills ERP system.
3. A new Supplier, Supplier Contact, and Supplier User that are not set up in the Black Hills ERP system.
4. A new Bidder, Bidder Contact, and Bidder User that are not set up in the Black Hills ERP system.

To provide some background, a Supplier defined in our ERP system is comprised of many different types of data. One of those data types is the Supplier Contact record. You or someone in your organization is typically defined there, although there are cases where a Supplier has no Contacts associated with it. A Supplier Contact record includes information about a person such as their Name, Role within the organization, Email, and Phone Number. Bidder Contacts work the same way.

During the Registration process, you will be asked to provide a phone number. Be sure to reference the phone number that you will want to use for Authy verification. You will also be entering your First and Last Name, as well as a Description. It is important that the Description field matches to your First and Last Names as shown in the example below.

First Name: John  Last Name: Smith  Description: John Smith

This enables Black Hills to determine if a Contact record already exists for you and has other data sync implications as well. As we show you how to perform the different types of Supplier Registrations later in this document, any Authy Considerations will be pointed out in those sections.
**Authy Usage**

On the Supplier Portal Public Homepage, click the Sign In Tile, and then enter your User Id and Password. Click the Sign In button.

The Authy Verification page displays. Note the four options available: Call Phone, SMS Text, Onetouch, and Token. The first time you use Authy, you will only see the Call Phone and SMS Text Options. Once you have been successfully validated, the Authy Onetouch and Enter Token options become available as well.

Here we will enter a Code provided by an SMS Text message. First, click the Get Code button. Authy sends an SMS Text message to your Mobile phone. After entering the Code, click the Verify button.
Once you are verified by Authy, you are logged in and taken to your Secure Supplier Portal Homepage.
Let’s look at a second verification method, Authy Onetouch. On the Supplier Portal Public Homepage, click the Sign In Tile, and then enter your User Id and Password. Click the Sign In button.

The Authy Verification page displays. Click the Onetouch Verify button. A message is sent to your Mobile phone.
Until you click the Approve button on the message on your Mobile phone, the Authy Sign in status stays as ‘Verification in progress’.

Once you approve on your Mobile phone, and are verified by Authy, you are logged in and taken to your Secure Supplier Portal Homepage.

**Tip:** Note that there are two other Authentication methods that work as follows:

- **Call Phone:** Enter the Code provided over your mobile phone or landline and then click the Verify button.
- **Token:** Enter the Token that appears on the Authy App on your mobile phone and then click the Verify button.
2.6 Forgot Password Processing

**Initial Setup**

Click the Change or set up Forgotten password help link.

You need to select one security question and response. The response is not case sensitive.

*Tip:* Perform this setup the first time you log into the Secure Supplier Portal. This will facilitate being able to easily request a temporary password in order to change your password in the future.
Forgotten Password Process

Click the Forgot Password? link on the Sign In pop-up.

Enter your User Id, and then click the Continue button.

Answer the question, then click the Email New Password button.
The following Confirmation page displays.

If you do not receive an email in your Primary Email Account please contact your Security Administrator or System Administrator to investigate the cause.

If you answered incorrectly, you will get the following email:

```
------ Forwarded message ------
From: <Company Name> security@12345.com
Date: Aug 3, 2020 at 5:00 PM
Subject: User ID Password
To: <user@example.com>

Response to Password Hint Question is not correct or was not processed. Please contact your security administrator if you need assistance resetting your password or if you did not attempt to reset your password via the Forgotten Password page. There is a delay between the processing of multiple Hint Responses. So even if you input the correct response it may not be processed unless enough time has passed.

This electronic message transmission contains information from Block Hills Corporation, an affiliate or subsidiary, which may be confidential or privileged. The information is intended to be for the use of the individual or entity named above. If you are not the intended recipient, be aware the disclosure, copying, distribution or use of the contents of this transmission is prohibited. If you received this electronic transmission in error, please reply to sender’s mailbox, then delete this message without copying it or further reading.
```

If you answered correctly, you will get the following email:

```
------ Forwarded message ------
From: <Company Name> security@12345.com
Date: Aug 3, 2020 at 5:09 PM
Subject: User ID Password
To: <user@example.com>

This is your new password 56d6kx1L--dMK
```
Go to the Public Supplier Portal page and enter your User ID and temporary Password. Click the Sign In button.

You are told your Password has expired. Click the link to change your Password.
After clicking the Change your Password link, you first receive the Authy Authentication page. Use a previously established method to verify yourself in the system.

You are then presented with the Change Password page. Enter your old and new passwords and click the Change Password button.

You are told your password has been successfully changed. Click Yes to access the Secure Supplier Portal Homepage.
Tip: When creating or updating a Password, avoid these special characters and situations:

‘ Single Quotes          “ Double Quotes          % Percent sign          zz Same character twice
3.0 REGISTER AS A BIDDER

3.1 Register as a Bidder

Bidders are organizations or individuals who would like to do business with Black Hills. Bidders can be invited to register as a Bidder, or they can just go to the Public Supplier Portal, click the Registration Tile, and sign up. What follows is a step by step guide to registering.

To get started, click the Registration Tile.

A new webpage is opened, and the CAPTCHA Dialog displays. Click the I’m not a robot checkbox.
The Captcha Challenge page displays. Do as instructed, then click the Verify button. Additional Challenge pages may display. Repeat the process.
Once you have been successfully validated, the I’m not a robot checkbox changes to a checkmark. Click the Register Now button.

The first page of the Bidder Registration Wizard displays below. Answer the questions and click Next.

**Tip:** Although you typically would select Selling goods/Services, you could select Both in anticipation of an intent to also buy surplus goods from Black Hills in the future. We would need to utilize that system functionality (currently not deployed).
On the Identifying Information page, enter your Tax ID Number and Entity Name. As you fill out the Profile Questions, note that the ones flagged with an * are required. Note that not all questions are shown in this Reference Guide.
As you attach documents to the Profile questions, please follow any Naming conventions in the Profile question. W9 shown below.

### Profile Attachments

<table>
<thead>
<tr>
<th>Attached File</th>
<th>Attachment Description</th>
<th>Upload</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Test_Document1.docx</td>
<td>Acme Survey W9_052020</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Questions

**Will you perform services on a Black Hills power generation or mine site?**
- No

**Will you perform services on Black Hills property?**
- Yes

**Will you perform services on a Black Hills Customer’s property?**
- No

**Will you have access to Personal Identifiable Information (PII) data?**
- No

**Will you provide IT services and/or IT products?**
- Yes

**If you will provide IT services and/or IT products, are the IT services or products hosted in a public cloud?**
- No

**Department or Name where you would like your PO sent.**

**Email where you would like your PO sent.**
We strongly recommend that you enter the Type of Contractor you are to help us categorize you and include you in appropriate Sourcing Events. Please go through and enter all applicable Additional Reporting Elements. When complete, click Next to be taken to the Address page.
Enter pertinent address information, then click Next to be taken to the Contacts page.

Click the Add Contact button to add an appropriate Contact(s).
When filling out the Contacts page, it is important that the First and Last Names in the Contact Information section match exactly to the Description in the User Profile Information section. Same spelling, same case, etc. This insures that the Authy recognizes you and that the Bidding Opportunities Tile in the Private Supplier Portal (to be discussed later) displays all pending Strategic Sourcing Events for your organization to bid on. Click OK to proceed.

**Business Rule:** When entering your User Id, it should be in all CAPS and start with SP_ followed by your first initial and last name. If that User Id already exists, you will receive an error message. To resolve, just add a 2, 3, 4, etc. at the end of your Last Name until it is accepted.
**Authy Considerations:** The Phone Number you enter here will be used to establish your Authy account at Black Hills and subsequent access to our Supplier Portal. Be sure to select a Phone Number that you wish to use to receive one or more of the following authentication methods: Phone calls, SMS Text messages, Onetouch, or Token requests.

Click Next to proceed to the Payment Information page.
Enter your Payment and Banking information as shown, and then click Next to go to the Categorizations page.
On the Categorizations page, select all Categories that are applicable to represent the goods and services you provide. Information selected here will help to insure you are included in Sourcing Events relevant to your business.

**Tip:** Selecting Child Categories allow you to be more specific in indicating what goods and services you provide.
Click the Terms of Agreement link to review them prior to clicking the checkbox to accept the Terms and Conditions. When all set, click the Submit button.

Tip: Click the Review button to review all the information you have entered prior to Submission for Bidder Registration Approval by Black Hills.
The Terms and Conditions associated with using the Black Hills Suppler Portal are displayed below. Click the Return button to go back to the Submit page.
After clicking the Submit button, your Bidder Registration is submitted to Black Hills Supply Chain personnel for review and approval.

**Registration Submit Details**

**Submitted**

✔️ You have successfully submitted your registration.

Your registration ID: 0000000047

Any email regarding the registration status will be sent to: sdavis@acmesurvey.com

**Example of Registration Submission Email**

Your Bidder Registration form, Registration ID 0000000047 has been submitted for approval.

You will be notified at this email address of any changes in your Registration status.

If you have any questions or feedback regarding your Registration ID 0000000047, please contact the Supplier Support Helpdesk at suppliersupport@blackhills corp.com.

Thank you.

Black Hills Energy

**Example of Registration Approval Email**

Your Bidder Registration application, Registration ID 0000000047 has been approved.

Bidder Name: Acme Survey Co.
Bidder ID: 0000000048

If you have any questions or feedback regarding your Registration ID 0000000047, please contact the Supplier Support Helpdesk at suppliersupport@blackhills Corp.com.

Note: Separate notifications containing logon information will be sent to all approved contacts created for this Bidder ID.

Thank you.

Black Hills Energy
Example of New User Account Created Email

Click the provided Supplier Portal link to get started.
4.0 REGISTER AS A SUPPLIER

4.1 Register as a Supplier

Suppliers are organizations or individuals who provide goods and services to Black Hills. Suppliers at Black Hills are either currently doing business with Black Hills (an Existing Supplier), or Black Hills wants / expects to do business with them in the future (a New Supplier). Here we are focused on setting up a New Supplier in the Black Hills Procurement system and providing that supplier access to the Supplier Portal. We will discuss the handling of an Existing Supplier in Section 5.

New Suppliers must be invited to register as a Supplier. They cannot register directly on the Supplier Portal like Bidders can. What follows is a step by step guide to registering.

You will need to receive an Invite Email (like the following) to get started. Make note of the Access Code, and click the Register as Supplier link.

Dear Tom Rollins,

You have been invited to register as a Supplier for Black Hills Energy. Once your Supplier Registration is complete, you will be eligible for consideration in providing goods or services to our company.

Please use the link below and access credentials to self register on our website.

Register as Supplier:

Access Code: B44C9SUPPLIER
Expiration Date: 2010-01-01

If you have any questions or feedback, please contact the Supplier Support Helpdesk at suppliersupport@blackhills corp.com.

Thank you,
Black Hills Energy
The first page of the Supplier Registration Wizard displays below. Enter the Access Code as indicated, answer the Entity question, and click Next.
On the Identifying Information page, enter your Tax ID Number and Entity Name. As you fill out the Profile Questions, note that the ones flagged with an * are required. As you attach documents to the Profile questions, be sure to follow any Naming conventions specified there. Note that not all Profile Questions are included in this Reference Guide.
We strongly recommend that you enter the Type of Contractor you are to help us categorize you and include you in appropriate Sourcing Events. Please go through and enter all applicable Additional Reporting Elements. When complete, click Next to be taken to the Address page.
Enter pertinent Address information, then click Next to be taken to the Contacts page.
When filling out the Contacts page, it is important that the First and Last Names in the Contact Information section match exactly to the Description in the User Profile Information section. Same spelling, same case, etc. This insures that Authy recognizes you and that the Bidding Opportunities Tile in the Private Supplier Portal (to be discussed later) displays all pending Strategic Sourcing Events for your organization to bid on. Click OK to proceed.

**Business Rule:** When entering your User Id, it should be in all CAPS and start with SP_ followed by your first initial and last name. If that User Id already exists, you will receive an error message. To resolve, just add a 2, 3, 4, etc. at the end of your Last Name until it is accepted.

**Authy Considerations:** The Phone Number you enter here will be used to establish your Authy account at Black Hills and subsequent access to our Supplier Portal. Be sure to select a Phone Number that you wish to use to receive one or more of the following authentication methods: Phone calls, SMS Text messages, Onetouch, or Token requests.
Click Next to proceed to the Payment Information page.
Enter your Payment and Banking information as shown, and then click Next to go to the Categorizations page.
On the Categorizations page, select all Categories that are applicable to represent the goods and services you provide. Information selected here will help to insure you are included in Sourcing Events relevant to your business.

**Tip:** Selecting Child Categories allow you to be more specific in indicating what goods and services you provide.
Click the Terms of Agreement link to review them prior to clicking the checkbox to accept the Terms and Conditions. When all set, click the Submit button.

**Tip:** Click the Review button to review all the information you have entered prior to Submission for Supplier Registration Approval by Black Hills.
The Terms and Conditions associated with using the Black Hills Suppler Portal are displayed below. Click the Return button to go back to the Submit page.

After clicking the Submit button, your Supplier Registration is submitted to Black Hills Supply Chain personnel for review and approval.
Example of Registration Submission Email

Your Supplier Registration form, Registration ID 0000000048 has been submitted for approval.

You will be notified at this email address of any changes in your Registration status.

If you have any questions or feedback regarding your Registration ID 0000000048, please contact the Supplier Support Helpdesk at suppliersupport@blackhillsenergy.com.

Thank you.

Black Hills Energy
5.0 REGISTER AS A NEW USER FOR AN EXISTING SUPPLIER

5.1 Register as a New User

If you are an existing Supplier, you need to be invited to Register as a New User in order to get a User Id and access your Supplier information. If you have not already received a Registration Request email from your Supply Chain contact, simply reach out to them to get an invite generated. Once you receive your email invitation, make note of your Supplier Id, and click the link as indicated to Register as a New User.

On the Register New User Accounts form (next page), fill out the requested information. Start by entering your Supplier Id (from the email), along with your TIN, which you will need to know. The Name field represents your First and Last Name, along with your Contact First and Last Name fields in our system exactly. This insures that Authy recognizes you and that the Bidding Opportunities Tile in the Private Supplier Portal (to be discussed later) displays all pending Strategic Sourcing Events for your organization to bid on. Once you are in the Supplier Portal, you will click the Manage Profile Tile to create or update your Supplier Contact record. You will validate that the Contact Name field on the Supplier contact record matches to the Contact Name field entered here. See Section 8.5 for more information. After completing the form, and accepting the Terms and Conditions, submit the New User Registration for approval.
**Business Rule:** When entering your User Id, it should be in all CAPS and start with SP_ followed by your first initial and last name. If that User Id already exists, you will receive an error message. To resolve, just add a 2, 3, 4, etc. at the end of your Last Name until it is accepted.
**Authy Considerations:**

The Phone Number entered on this New User Registration page is strictly to facilitate Authy processing. If the Phone Number field is initially blank, that means that either a Supplier Contact record does not exist for you, or one exists, but the Phone Number field on it is blank. When processing this page, the system reacts differently when a Supplier Contact record already exists vs. when it does not.

**Supplier Contact record exists for you:**

The Phone Number field on the New User Registration page is auto-populated only if your Contact record exists and a Phone Number is present. This is determined by a comparison of the Contact Name entered here on the New User Registration page to the Supplier Contact record. If you change the Phone Number on the New User Registration, it will be updated on the Supplier Contact record.

**Supplier Contact record does not exist for you or does not match your New User Registration:**

You must enter a Phone Number on the New User Registration to support Authy processing. Secondly, you should validate your Supplier Contact record when you login for the first time. Navigate to the Manage Profile Tile, Contacts menu item, and verify if a Supplier Contact record exists for you. If it does, update it as necessary to reflect the information you just added on the New User Registration page so they are in sync. If a Supplier Contact record does not exist, add one to reflect the information you just added on the New User Registration page so they are in sync. The Contact Name fields need to match between your New User Registration and your Supplier Contact record.
Example of User Registration Approval Email

Your User ID SP_NIELSON associated with Supplier ID 0000096146 has been approved.

You will be notified at this email address of any changes.

If you have any questions or feedback regarding your User ID SP_NIELSON, please contact the Supplier Support Helpdesk at suppliersupport@blackhillscorp.com.

Thank you.
Black Hills Energy
6.0 PERFORM A SUPPLIER CHANGE REQUEST

6.1 Supplier Change Request

A Supplier Change Request is used to request an update to your Supplier record in the Black Hills Procurement system. It is a good practice to review your information once a year to insure it is up to date. Additionally, when an existing Supplier registers as a New User and receives their Approval Notification email, that is an excellent time to review your existing Supplier information and request any required changes. The Supplier Change Request Wizard does just that. It displays existing information to you which can be reviewed and updated as required. To start, access the Public Supplier Portal view, and Sign In with your User Id and Password.

**Tip:** If you just registered as a New User for an Existing Supplier, and are accessing the system for the first time, make sure your Contact information is up to date on your Supplier record. You can do this either by reviewing the Supplier Contacts on the Manage Profile Tile, or by creating a Supplier Change Request (SCR). On the Manage Profile Tile, Contact information, in particular the Name field, needs to match exactly to the Description field on your User Security record (the way you registered). If you use the SCR, Contact information, in particular the Contact Name field, needs to match exactly to the Description field on your User Security record (the way you registered). Regardless of your update method, this ensures that you will receive Bid Requests under the Bidding Opportunities Tile and that you are recognized by Authy.
The Private Supplier Portal Tiles are displayed. Click the Manage Profile Tile.

Select the Supplier Change Request menu item. Click the Next button to begin.
Review and update any information on the Company Profile page. When done, click Next to continue.

**Tip:** Be sure to update the Type of Contractor field. This helps us to properly categorize you and include you in appropriate Sourcing Events. Filling in other relevant Additional Reporting Elements is also advantageous as we work to meet Federal Reporting Requirements in these areas.
Note that there are new Profile Questions, and that required ones (flagged with an *) must be answered before you can move on to the next page. Note that not all Profile Questions are displayed in this Reference Guide.
When done, click Next to move to the Address page.
Click the Edit icon to edit an existing Address, or the Add New Address button if required. Here we click the Edit icon.

Here is the Edit Address Information page. Update as required. Click OK, and Next to proceed to the Contact Information page.
Click the Edit icon to edit an existing Contact, or the Add New Contact button if required. Here we click the Edit icon.

Here is the Edit Contact Information page. We are updating the Phone Information. When done, click OK, and Next to proceed to the Payment Profile page.

**Business Rule:** To support Multi-Factor Authentication, a Supplier User must have a Business Phone registered here to match to information stored in their MFA Account at our Security Vendor.

**Tip:** Validate that the Contact Name field exactly matches the Description field on your User Security record (the way you registered). This ensures that you receive Bid Requests under the Bidding Opportunities Tile and that Authy properly recognizes you.
Click the Edit icon to edit existing Payment Information.

In this case we are updating the Payment Terms. When done, click OK, and Next to proceed to the Categorization page.
Use the Categorization page to indicate the goods and services you can provide to Black Hills. You can select more than one category, and the more specific you can be, the better. Click Next to proceed to the Review and Submit page.

Click the Review button to see your requested changes.
The requested changes are displayed. They can be edited if necessary. Click the Return button to go back to the Review and Submit page.

On the Review and Submit page, click the Confirm Changes checkbox, and then click the Submit button.
Your requested Supplier Changes have been submitted to Black Hills for approval and subsequent Supplier updating in our system.

**Business Rule:** Note that on occasion, you may receive an email notification from Black Hills asking you to review and update when appropriate your Supplier information. Use the link provided in the email to access the Supplier Portal. Navigate to the Supplier Change Request to perform this task.
7.0 REVIEW TRANSACTIONS WITH BLACK HILLS

7.1 My Preferences

One of the most useful features of the Private Supplier Portal is the ability for a Supplier to review their transactional activity with Black Hills. As the Secure Homepage below shows, this information ranges from Purchase Orders to Invoices and Payments. Additionally, a Supplier can see Sourcing Events they have been invited to bid on. Let’s review these transactions in more detail.

Before we begin, it is important to note the My Preferences page, accessible via the Menu icon in the upper right-hand corner of the page.
The My Preferences page provides you with the ability to set your initial Default options for the different Tiles available on the Secure Portal Homepage.
7. 2 Purchase Orders

The Purchase Order Tile provides a listing of the Purchase Orders issued to you over a timeframe. You can adjust the Filter (Green icon) to specifically target POs you are looking to display. Clicking the PO Details > icon (or the whole row) expands the Purchase Order so you can see more detail.

There are various Filters you can use to limit your answer set.
When a Purchase Order is drilled into from the Initial page display, this is the data that becomes available for review:

**Purchase Order Details**
- Po Number: 123456789
- Po Status: Dispatched
- Buyer: John Doe
- Billing Location: COMP
- Payment Terms: 30/90

**Purchase Order Total**
- Merchandise Amount: $200.00
- Freight/Tax/ Misc.: $0.00
- Total Amount: $200.00 USD

**Purchase Order Lines**
<table>
<thead>
<tr>
<th>Line</th>
<th>Status</th>
<th>Item ID</th>
<th>Description</th>
<th>Quantity</th>
<th>Merchandise Amt</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Active</td>
<td>00000001</td>
<td>FILTER, AIR</td>
<td>1.0000 EA</td>
<td>49.99 USD</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Active</td>
<td>00000002</td>
<td>BREATHER</td>
<td>4.0000 EA</td>
<td>195.72 USD</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Active</td>
<td>00000003</td>
<td>FILTER, AIR</td>
<td>1.0000 EA</td>
<td>34.79 USD</td>
<td></td>
</tr>
</tbody>
</table>

**Invoice List**
- Invoice: 00000001
- Amount: $800.00
- Due Date: 04/23/2020
- Appr. Date: 04/23/2020
- Voucher: 00000001

PO Line Information below.
Note the Actions that are available on the Initial display page. The Acknowledge POA is currently disabled (potential future functionality) but the View PO Dispatch Document is available.

Click the View PO Dispatch Document Action to see the page below. Click the View PDF to see the PO in .pdf format.
7. 3 POs with Overdue Shipments

The POs with Overdue Shipments Tile provides a listing of the Purchase Orders issued to you over a timeframe, with a focus on Overdue Schedules. You can adjust the Filter (Funnel icon) to specifically target POs you are looking to display. Clicking the Schedules Overdue icon displays that information.

There are various Filters you can use to limit your answer set.
When the Purchase Order Schedules are drilled into from the Initial page display, this is the data that becomes available for review:

<table>
<thead>
<tr>
<th>Line</th>
<th>Schedule</th>
<th>Item Description</th>
<th>Supplier Item ID</th>
<th>Ship To</th>
<th>Order Quantity</th>
<th>Pending Quantity</th>
<th>Due Date</th>
<th>Overdue Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>FILTER, OIL, (384)</td>
<td>WYODAK STOREROOM</td>
<td>1.000</td>
<td>1.000</td>
<td>04/17/2020</td>
<td>33 days</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>FILTER, CAB, INSIDE</td>
<td>WYODAK STOREROOM</td>
<td>1.000</td>
<td>1.000</td>
<td>04/05/2020</td>
<td>0 days</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>FILTER, AIR, GENSET, UNIT 156</td>
<td>WYODAK STOREROOM</td>
<td>1.000</td>
<td>1.000</td>
<td>04/16/2020</td>
<td>34 days</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>1</td>
<td>FILTER, FUEL, GENSET, UNIT 156</td>
<td>WYODAK STOREROOM</td>
<td>1.000</td>
<td>1.000</td>
<td>04/17/2020</td>
<td>35 days</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>1</td>
<td>FILTER, FUEL</td>
<td>WYODAK STOREROOM</td>
<td>2.000</td>
<td>2.000</td>
<td>04/22/2020</td>
<td>28 days</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>1</td>
<td>FILTER, AIR (AIR 100) 1 (351473)</td>
<td>WYODAK STOREROOM</td>
<td>2.000</td>
<td>2.000</td>
<td>04/23/2020</td>
<td>30 days</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>1</td>
<td>FILTER, ELEMENT, HAA, TRUCK, UNIT 302, KOMATSU 933: AG</td>
<td>WYODAK STOREROOM</td>
<td>4.000</td>
<td>4.000</td>
<td>04/16/2020</td>
<td>34 days</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>1</td>
<td>FILTER, OIL, HAA, TRUCK, UNIT 302, KOMATSU 933: AG</td>
<td>WYODAK STOREROOM</td>
<td>4.000</td>
<td>4.000</td>
<td>04/17/2020</td>
<td>33 days</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>1</td>
<td>FILTER, ELEMENT, HAA, TRUCK, UNIT 302, KOMATSU 933: AG</td>
<td>WYODAK STOREROOM</td>
<td>6.000</td>
<td>6.000</td>
<td>04/16/2020</td>
<td>34 days</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>1</td>
<td>FILTER, ELEMENT, HAA, TRUCK, UNIT 302, KOMATSU 933: AG</td>
<td>WYODAK STOREROOM</td>
<td>4.000</td>
<td>4.000</td>
<td>04/21/2020</td>
<td>29 days</td>
<td></td>
</tr>
</tbody>
</table>
Note the Actions that are available on the Initial display page. We have already reviewed the View PO Dispatch Document Action.

Let’s look at the View PO Information page below. The PO Details are displayed.
7.4 Receipts

The Receipts Tile provides a listing of the Receipts created against your shipments to Black Hills over a timeframe. You can adjust the Filter (Green icon) to specifically target Receipts you are looking to display. Clicking the Receipt Details > icon (or the whole row) expands the Receipt so you can see more detail.

There are various Filters you can use to limit your answer set.
When a Purchase Order is drilled into from the Initial page display, this is the data that becomes available for review:

### Receipt Details
- **Receipt Number:** 02001037
- **Packaging Slip Number:** 
- **Receipt Date/Time:** 02/21/2020 9:27AM
- **Receipt Status:** Moved to Destination
- **Item ID:** 000007004
- **Supplier Item ID:** 
- **Quantity Received:** 5.0000 EACH
- **Quantity Inspected:** 0.0000 EACH
- **Quantity Accepted:** 0.0000 EACH
- **Quantity Returned:** 0.0000 EACH
- **Quantity Rejected:** 0.0000 EACH
- **Net Receipt Quantity:** 5.0000 EACH
- **Reason for Rejection:** 
- **RBA Number:** 
- **RBA Line:**

### Purchase Order Schedule

<table>
<thead>
<tr>
<th>PO Number</th>
<th>Due Date</th>
<th>Quantity</th>
<th>Ship To</th>
<th>Ship Via</th>
<th>Freight Term</th>
<th>Price</th>
<th>Merchandise Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>120010307</td>
<td>02/14/2020</td>
<td>5.0000</td>
<td>WYCKOFF STOREROOM</td>
<td>COMMON CARRIER</td>
<td>FREIGHT COLLECTOR</td>
<td>111.36000</td>
<td>$256.80 USD</td>
</tr>
</tbody>
</table>
7. 5 Invoice Inquiry

The Invoice Inquiry Tile provides a listing of your invoices to Black Hills over a timeframe. There are other fields available to limit the search results as well. It provides comprehensive information including status and display of / links to related documents, including Payments, Purchase Orders, and Receipts.

Click the Invoice Number link to see more details about that invoice.
7.6 Payment Inquiry

The Payment Inquiry Tile provides a listing of your Payments from Black Hills over a timeframe. There are other fields available to limit the search results as well. It provides detailed Payment information as well as references to the invoices that were paid on a given payment.

Click a specific Payment to drill into it.
The Payment Details as well as the Invoices paid are displayed for your review.
7. 7 Bidding Opportunities

The Bidding Opportunities Tile provides a listing of all Sourcing Events that are currently active that your company has been invited to enter a Bid Response for. Click this tile to see your Events.

**Tip:** To see active Events under the Bidding Opportunities Tile, ensure that the Description field in your User Profile exactly matches the Name field on your Supplier Contact record. Otherwise the system cannot accurately identify you, and this Tile will not show any active Events. You can still see all your Event History under the My Event Activity Tile if you are having display issues with the Bidding Opportunities Tile. Look to the User Profile and Contact sections of this document for more information.
Your active Events display on this page. The Bid Status, along with when the Event started and ends are displayed for your reference. Click the Event Details > icon to drill into the Event. Menu items along the left side of the page allow you to limit the Results list.

Click the View Bid Package link to access more information about the Event. Click the Bid on Event button to start your Bid Response. The Upload Bid button is discussed in the following Tip.
**View Bid Package link:** Instructions to Bidders and RFP Requirements are displayed in the Comment section. The Attachment Files can be downloaded by clicking on them. Some of them may need to be filled out as part of your response to the RFP. If needed, you would come back here to retrieve them. The Terms and Conditions of the Event, which you will need to verify that you read, can be found in the .pdf document which details the Event.

![Attachments Table]

**Tip:** Make special note of the .xml file. This is a file which you can download so you can create your Bid Response offline. You would then come back into the Supplier Portal and upload the .xml file via the Upload Bid button displayed on the previous page. This is an optional process that you can use instead of filling out the Bid Response online, which will be discussed in the next section.

**Bid on Event button:** This starts your Bid Response. You are taken to the page below. Scroll through it and answer the questions presented to you.

![Event Details Page]

---

Page 90
Questions relating to the whole Event display. Answer to the best of your ability. Questions flagged with an * are required.
As you scroll down the Bid Response, you will come to Line Level questions. Drill into them by clicking the Bid link.

Scroll down each Line and answer the questions to the best of your ability. Questions flagged with an * are required. When done, click the Next Line button until you have completed all Lines. When done, click the Start Page button.
Click the Validate Entries button, correct any errors that are found, and then click the Submit Bid button.
7. 8 My Event Activity

The My Event Activity Tile is similar to the Bidding Opportunities Tile, with the main difference being that it allows you to call up historical information, such as previously submitted bids. Here we click on all Events that the Supplier was invited to.

Click on the Event expansion triangle to see the Event Summary; click on an Event link to see the related details.
Event expansion triangle displays Award Summary.

Event link displays Event Details.
7. 9 Awarded Events

The Awarded Events Tile provides a listing of the Events that have been awarded to you. You can adjust the Filter (Green icon) to specifically target Events you are looking to display. Clicking the Award Details icon displays some additional detail.

There are various Filters you can use to limit your answer set.
When an Event is drilled into from the Initial page display (Award Details icon), this is the data that becomes available for review:

![Award Details Table]

<table>
<thead>
<tr>
<th>Bid Number</th>
<th>Award Date</th>
<th>Award Type</th>
<th>Buying Organization</th>
<th>Purchase Order/Contract ID</th>
<th>Transaction Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>06/19/2020</td>
<td>Purchase</td>
<td>BH SERVICE COMPANY LLC</td>
<td>800881767</td>
<td>Open</td>
</tr>
</tbody>
</table>
8.0 SUPPLIER PORTAL ADMINISTRATIVE FUNCTIONS

8.1 Manage Profile – Update Profile

Access the Public Supplier Portal, then login to the Private Supplier Portal. Here we are logging in as a Supplier.

Once in the Secure Supplier Portal, click the Manage Profile Tile.
The Manage Profile Tile is used to support a number of Supplier Administrative functions. These include items such as Update Profile, add / update new Supplier Users, create / update a Supplier Change Request, review Address, add / update Contacts, and update Supplier Categorizations. The Update Profile page is shown below, accessed by clicking the Update Profile menu item. Supplier Users can update their password and perform general maintenance on their Profile.
8.2 Manage Profile - Add a New User

Access the Public Supplier Portal, then login to the Private Supplier Portal. Here we are logging in as a Supplier.

Once in the Secure Supplier Portal, click the Manage Profile Tile.
Click the User Profiles menu item, and add a New User as shown below.

Business Rule: When entering your User Id, it should be in all CAPS and start with SP_ followed by your first initial and last name. If that User Id already exists, you will receive an error message. To resolve, just add a 2, 3, 4, etc. at the end of your Last Name until it is accepted.

Additionally, to facilitate the proper operation of Authy and the Bidding Opportunities Tile, navigate to the Manage Profile Tile, Contacts menu item and add a matching Contact record for the User Id you just created. Note that the Name field on the Contact needs to match the Description field on the User Profile (above) exactly (same spelling, same case, etc.). See Section 8.5 for more information.
There are two types of Users that you can set up for your organization:

- **Admin User** - Full access; can do anything in the Supplier Portal
- **General User** - Can see all transactions in the system (POs, Invoices, and Payments), respond to Bid Requests, and update Categorizations

The User Security Roles needed for each type of User are specified in this grid:

```
<table>
<thead>
<tr>
<th>User Role</th>
<th>Sup Admin</th>
<th>General</th>
</tr>
</thead>
<tbody>
<tr>
<td>BHC Supplier-CSR - Level 2</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>BHCES_EVENT_BIDDER</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>BHCES_SP_SCR</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>BHCES_SUPPLIER_ADMIN</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>BHCES_SUPPLIER_USER</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>BHCSP_PRIVATE_PRTL_FL</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>PAPP_USER</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
```

Select from the roles indicated below to set up a new User for your organization. We will set up a new Supplier Admin User.
Click the Add a Supplier button to associate your new User with your organization.

Select your Supplier Name and click OK.
Click Save to create your new User Id. The new User will receive an email from Black Hills indicating that they have been set up and can access the Supplier Portal.
8.3 Manage Profile – Bidder Profile

Access the Public Supplier Portal, then login to the Private Supplier Portal. Here we are logging in as a Bidder.

Once in the Secure Supplier Portal, click the Manage Profile Tile.
Click the Bidder Profile menu item. You have the ability to update your Bidder information. View information on the Main tab, then click the Addresses Tab.
Here we perform an update to Address Line 2 and save the Bidder record. Click the Contacts Tab to review the information stored there.
Note that the Contact information displayed here was established when you filled out the Bidder Registration Wizard to initially register as a Bidder. Importantly, the Name fields match exactly to the Description on the User Profile, ensuring you will see the Events you are invited to on the Bidding Opportunities Tile and that Authy properly recognizes you.
8.4 Manage Profile - Maintain Address

Access the Public Supplier Portal, then login to the Private Supplier Portal. Here we are logging in as a Supplier.

Once in the Secure Supplier Portal, click the Manage Profile Tile.
Click the Addresses menu item. Click the Description link to access Address information.

Note that Addresses can only be viewed, not maintained here. To maintain or add an Address, perform a Supplier Change Request.
8.5 Manage Profile - Maintain Contacts

Access the Public Supplier Portal, then login to the Private Supplier Portal. Here we are logging in as a Supplier.

Once in the Secure Supplier Portal, click the Manage Profile Tile.
Contacts can be edited, or a new Contact added via this transaction.
Note that information entered here is directly updated on your Supplier record in the Black Hills Procurement System. The Contact below was established to match to the User ID created by the Supplier Administrator in Section 8.2. Importantly, the Name field matches exactly to the Description on the User Profile, ensuring this User will see Events they are invited to on the Bidding Opportunities Tile and that Authy properly recognizes them.

**Tip:** Be sure to add all your relevant Contacts to the system using these pages. When you register as a new Supplier or Bidder, your Contact information is added to the system automatically. However, if you registered as a New User for an Existing Supplier (Section 5.1), or you added a New User as the Supplier Admin (Section 8.2), Contact information was not created. You will need to add or update it manually here.
8.6 Manage Profile - My Categorizations

Access the Public Supplier Portal, then login to the Private Supplier Portal. Here we are logging in as a Supplier.

Once in the Secure Supplier Portal, click the Manage Profile Tile.
Click the My Categorizations menu item. Select all relevant categories that describe the goods and/or services you can provide to Black Hills. Information you enter here is automatically reflected on your Supplier record in the Black Hills Procurement system.
8.7 Terms and Conditions

Access the Public Supplier Portal, then login to the Private Supplier Portal. Here we are logging in as a Supplier.

Once in the Secure Supplier Portal, click the Terms and Conditions Tile.
The Terms and Conditions associated with doing business with Black Hills are displayed. Note that the last three Sections (13-15) pertain to your usage of the Supplier Portal.
8.8 FAQs / Contact Us

Access the Public Supplier Portal, then login to the Private Supplier Portal. Here we are logging in as a Supplier.

Once in the Secure Supplier Portal, click the FAQs / Contact Us Tile. Note that this Tile is also available on the Public Supplier Portal view as well.
The FAQ Tile provides general information about the Supplier Portal and Black Hills including Who We Are, Registration information, and Support Questions. Additionally, Contact information is provided so that an individual can reach out to Black Hills for more information or support regarding the Supplier Portal.