



# CH2MHILL

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## Help Guide for ePortal

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If you require additional help, or have questions, contact:

[CMASHelpDesk@ch2m.com](mailto:CMASHelpDesk@ch2m.com)

# CH2M HILL Supplier / Subcontractor ePortal

## **Introduction:**

CH2M HILL's ePortal provides Suppliers and Subcontractors the ability to do much of their business with CH2M HILL in a secure online environment. The CH2M HILL ePortal integrates Supplier / Subcontractor information into the CH2M HILL Materials and Subcontract Management System (CMAS) which is utilized for Procurement on projects across company business groups.

The ePortal registration system provides an easy way for contractors and suppliers to register and continuously maintain qualifications online. The ePortal also allows suppliers and subcontractors to submit bids online and, once an agreement is issued, execute agreements online. The ePortal also will facilitate interactive communications, submittals, and administration of subcontracts on projects.

As the first step, CH2M Hill invites companies to register online via the Suppliers and Subcontractor ePortal. Companies may use this tool register with CH2M HILL, to indicate that they are a certified diversity supplier or contractor, to fill out our supplier/subcontractor questionnaire and attach certification documents, and to identify the types of materials or services which they provide, all of which will make it easier to do business with CH2M HILL.


The Supplier / Subcontractor registration process consists of 3 steps:

1. The initial Logon Request establishes basic company information and obtain a User ID and Password.
2. The Company Profile is submitted to further establish your company's line of business and certifications.
3. The Qualification Statement provides additional detailed information to better enable you to work with CH2M HILL.

## **Glossary of Terms:**

ePortal – Internet portal, accessed from the CH2M HILL Procurement Website, by which Suppliers and Subcontractors can access our CMAS software system for bidding on project inquiries after their LOGIN REQUEST, COMPANY PROFILE and QUALIFICATIONS have been approved.

CMAS - CH2MHILL Materials and Subcontract Management System (software application)

LOV – list of values; use the  button in the menu bar or your F2 key to activate any existing LOV for a field. If arrow is 'greyed out' (not active) it indicates that there is no list of values available.

Material/Work Groups – numeric, predefined categories we use to define specialization of potential bidders

If you run into any difficulties not explained in this document, please contact our help desk (provide screenshots of the error and a phone number where you can be reached. Providing this, we can work quickly to resolve your issue): [CMASHelpDesk@ch2m.com](mailto:CMASHelpDesk@ch2m.com)

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## **Helpful Hints for successful installation and use of ePortal (aka FAQ)**

Using Firefox may cause a "Need Plug-In" loop – we are working to fix, but until then, the solution is to download and use different browser software (IE7, etc.).

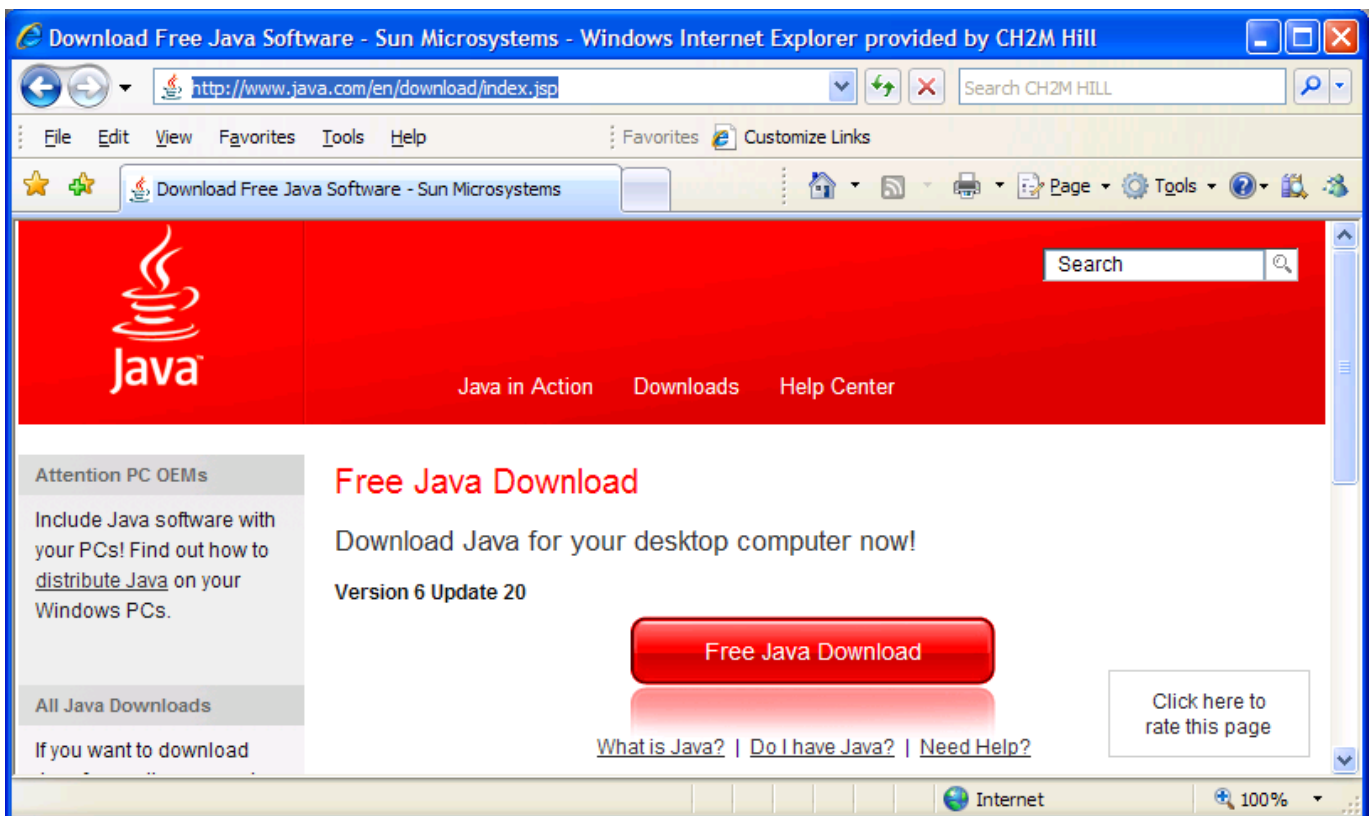
If you do not have ADMINISTRATIVE right on your computer, it may not allow you to install the ePortal software. You will get errors that - .DLL file did not install.

Do you have a pop-up blocker on that is preventing you from seeing messages being sent? Disable POP-UP blocking for our site.

Is your Virus Software preventing download and install? You may have to disable during installation.

If you are using Windows 7 under Internet Explorer 8 – our software has “issues” that we are working to fix; instead of letting Java download through the Procurement web site, download the latest version of Java from the <http://www.java.com/en/download/index.jsp> website (as of this PDF version it was version 6 Update 20).

Solution: Open windows explorer and go to the following directory: <C:\Program Files\Oracle\JInitiator 1.3.1.22\bin\hotspot>. Copy the file attached (jvm.dll) included in this email into the directory replacing the file that is there.



Does your firewall prevent you from downloading Java? (Contact your IT people)

Perhaps there is an existing (older version) of Java that needs to be uninstalled before this one can download. (If you feel confident uninstalling previous versions of Java, good; otherwise, contact your IT people on how to proceed.)

Once Java completes its installation you will have a window that looks like this (it may be hidden behind an open window – use ALT + TAB to switch windows until you can access it):



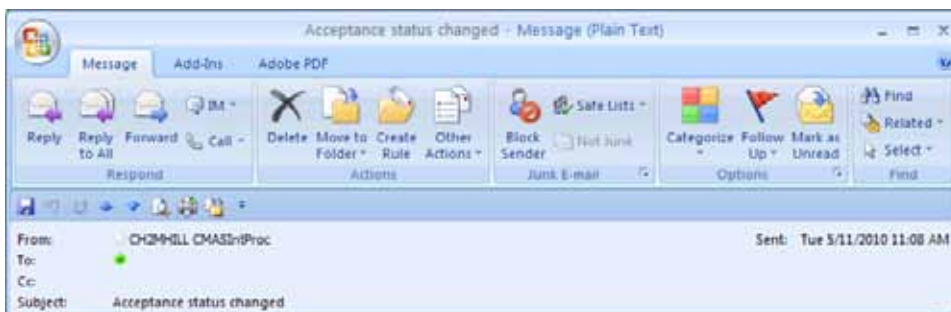
## **Tricks and Tips for Using ePortal**



When a document attachment/upload is required, do not name the document with a special character in the name [ &, %, \$, #, @, ! ] or we will be **unable to open** the file (i.e., J&B Mining OSHA Document.pdf).

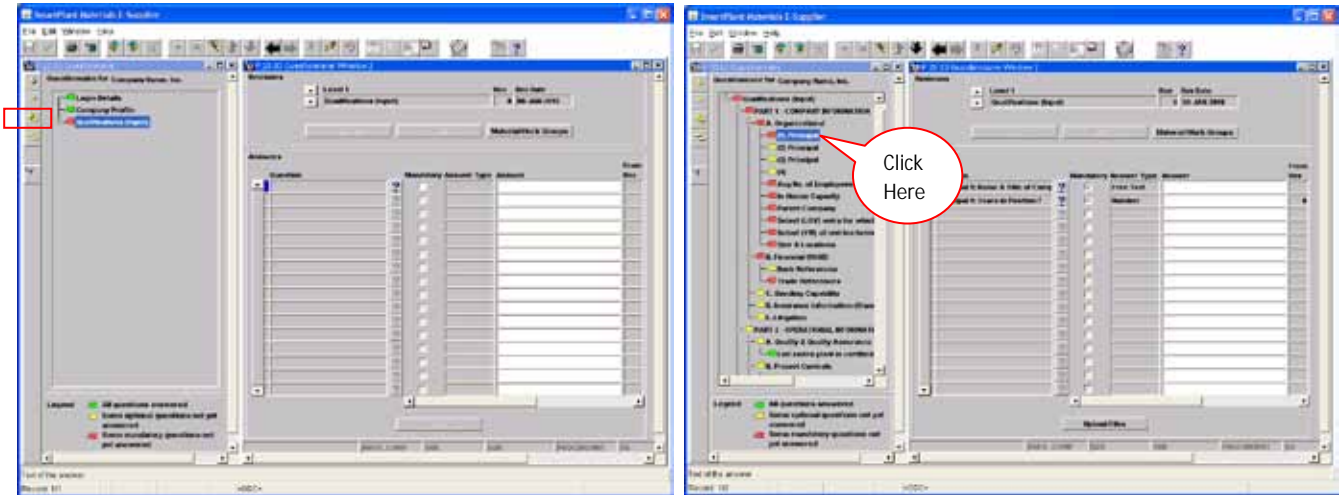
After your initial 'Submit' to our database, you will always be required to click the '**Revision**' button before making any changes, additions, or uploads to your record. After saving your changes, always click the '**Submit**' button to write your changes to our database.

You may have perfectly good attachments, but if they are uploaded to the wrong question, you will not be able to 'Submit' your data. There is a one-to-one relationship between questions and attachments. You will never be required to have **more than one** attachment on ANY question in the entire questionnaire. NOTE: Multiple document uploads are allowed per a single question, if multiple files rather than a single one will satisfy the question.

You won't see the last qualifications section (Qualifications) in your file tree until after you have submitted your Company Profile, we have examined it, and you receive an email notification that there has been an "Acceptance Status Change" to your Company Profile.

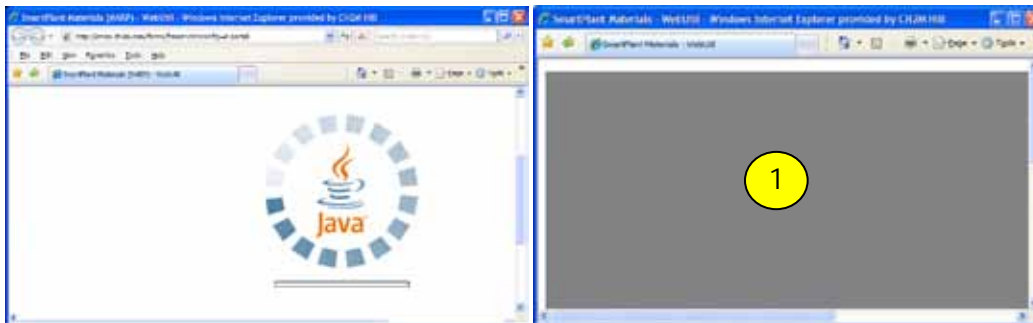


When you first click on the Qualifications folder, click the double plus  to expand all folder levels, or it will appear as if there are no questions. Then you may navigate the folder tree by clicking on the lowest folder level to show the questions. Save often .



## The First Time You Log Into the ePortal

- 1) Every time you use the URL for ePortal a similar window will open. First it loads Java, then it turns gray, **please leave it open**, or this will immediately close your ePortal session. If you close this window, the session will immediately end.



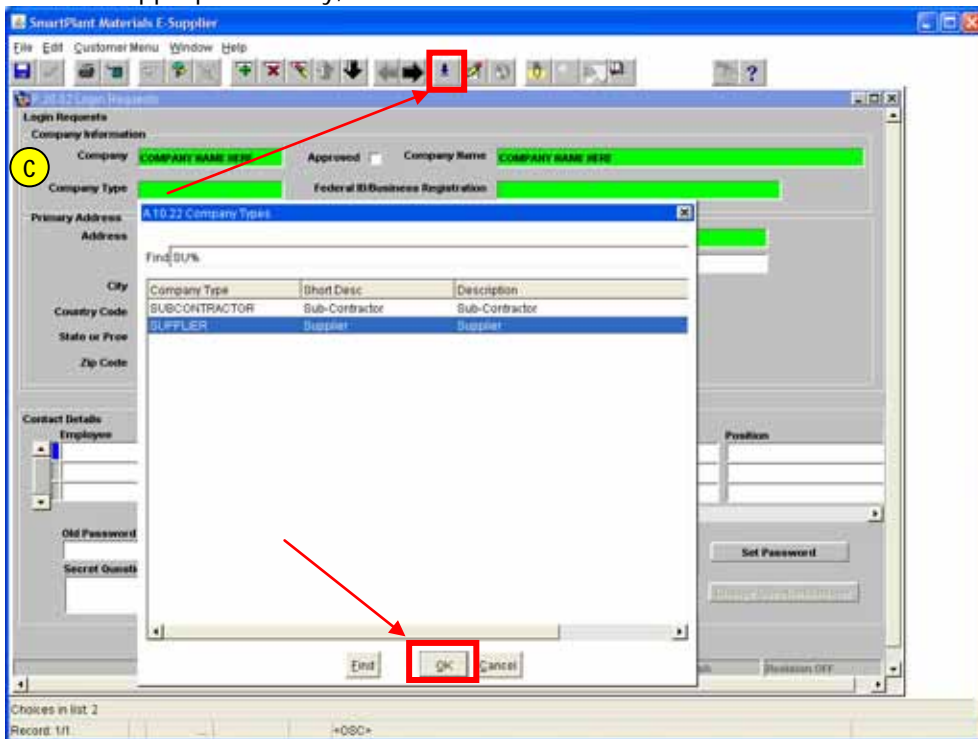
- 2) The first time you enter the ePortal site, if you have not been provided a login ID and Password, click on the New Company button



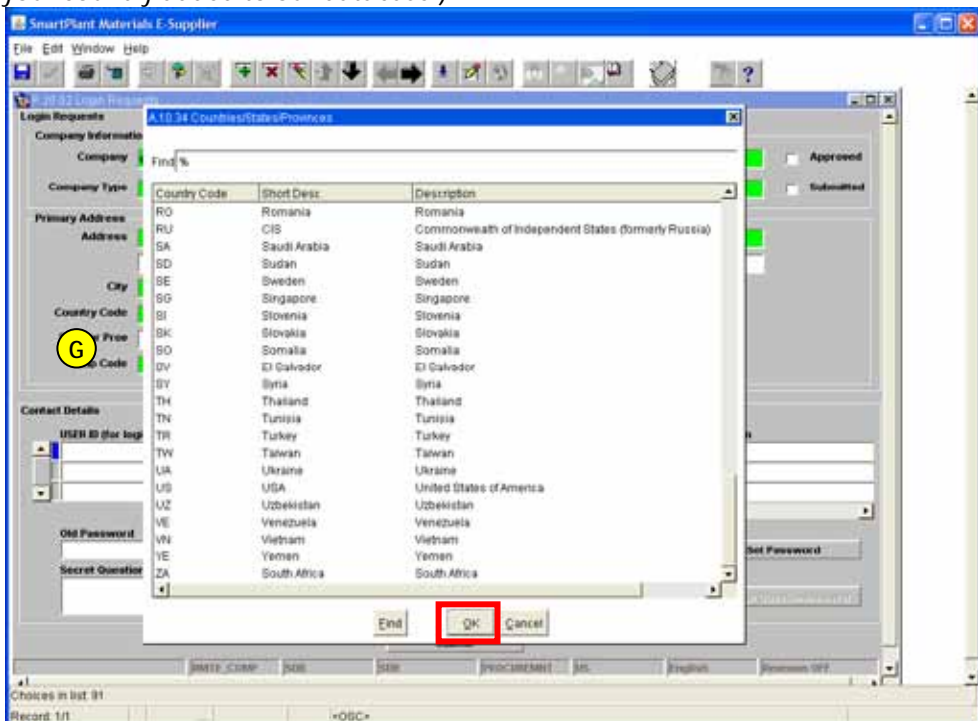
3) Enter your company information into the form that opens (additional explanations of Steps A-U follow)

- A) Company Name (accepts up to 20 characters, used as unique identifier for your company in our system)
- B) Your Legal Entity Name (enter this name as you would have your name appear on contracts)

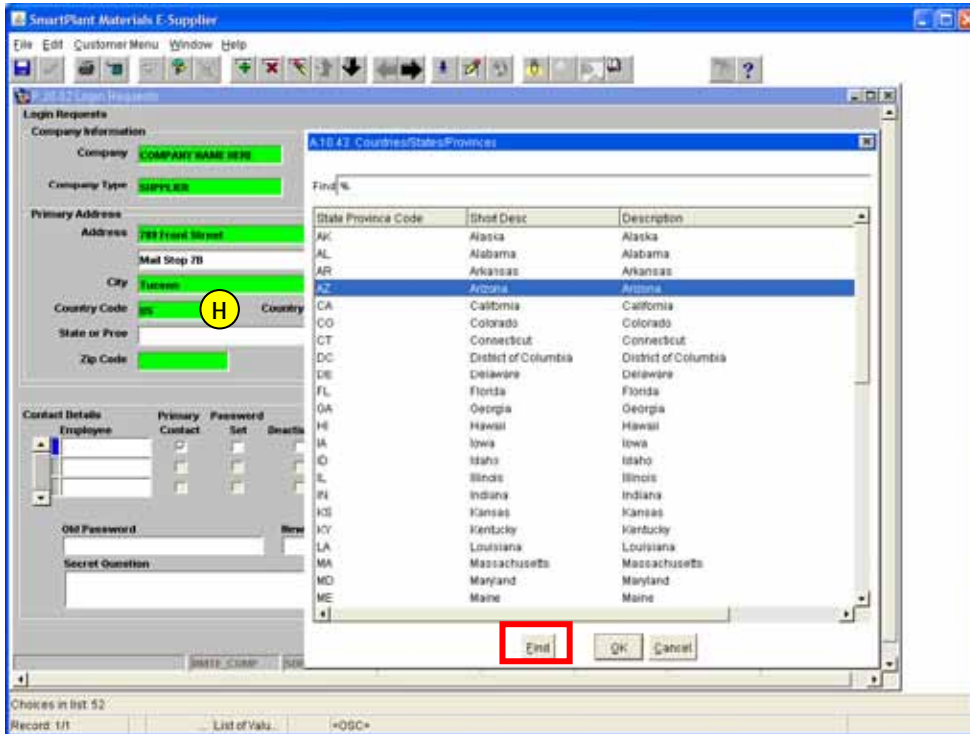
- C) Company Type: The LOV will open when you tab into this field, or use LOV arrow from the menu bar, select the appropriate entry, click OK



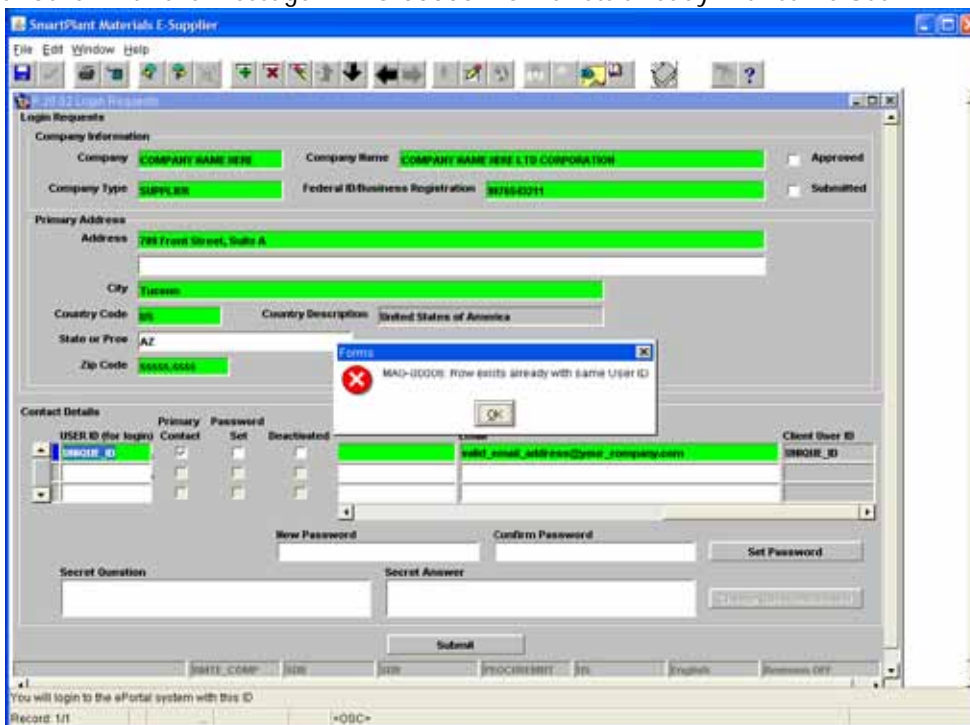
- D) For USA companies this is the unique Federal Identification number or tax identification number assigned to a business. For non-USA companies this is the unique identification number used in that country to identify and register that company to do business.
- E) Street address (2<sup>nd</sup> line is optional)
- F) City
- G) Country code - When you initially enter the field, the LOV automatically opens, (later, use LOV icon if you need to change your answer) – if your country is not in this list, select US (until we can enter your country code in this list – then, notify the help desk ([CMASHelpDesk@ch2m.com](mailto:CMASHelpDesk@ch2m.com)) that you require your country added to our database.)



- H) When you tab into this field the List of Values opens – filtered by your entry in the Country Code; we have tried to populate the correct provinces for countries. (For US: Select the 2 Character US State (i.e., AL, CA, SC); if you need to enter a Province (i.e., Alberta) enter the text %Alberta% into the Find field and click on the Find button. The '%' character is a wildcard for search in our software.)



- I) Zip or Postal Code  
 J) Use your mouse to enter the USER ID (for login) field; using Tab will loop your cursor to the first entry. Enter a unique User ID you will use to log into the system (up to 10 characters, i.e., MROBERTS, XB\_LOG6, X-PIComp); should you select a user id already in use, the software will ask you to enter another with the message "MAG-00006: Row exists already with same User ID."



- K) Check box if you will be the Primary Contact for Inquiries & Bids (one entry should be checked)  
 L) Last Name  
 M) First Name

- N) Your position within your company (title)
- O) Your department within your company
- P) 10-digit US phone, or country code and phone for non-US phone numbers
- Q) Your valid email address (this will be used to notify you that your login request has been approved, bidding is available online, etc.)

If you try to enter the Password fields, you will get the following message "Save the Changed Record First": (Click Okay to the dialog box before you Save your record)

This message will appear at the bottom of your screen

FRM-40400: Transaction complete: 2 records applied and saved.  
Record: 1/1 ... <OSC>

- R) Enter a password (up to 8 characters, i.e., Zulo\_123), then confirm with the same password. Passwords are case sensitive.

- S) Click 'Set Password' to write your selection in our system (a confirming message comes up and the set password box becomes checked now); Click OK to close the confirming message. You should now receive an email with your User ID and Password – *keep it in a safe place – or use the "Forgot Password" button on the login page – you only need to enter your email address.*

After clicking confirming message, the Password Set checkbox on your row is now checked and the system has accepted your Employee/User ID as unique.

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P-20 02 Login Request

Login Request

Company Information

Company: COMPANY NAME HERE Company Name: COMPANY NAME HERE L3L Corporation Approved

Company Type: SUPPLIER Federal ID/Business Registration: 947660211 Submitted

Primary Address

Address: 198 Fred Street, Suite A

City: Tucson

Country Code: US Country Description: United States of America

State or Prov: AZ

Zip Code: 85705-0505

Contact Details

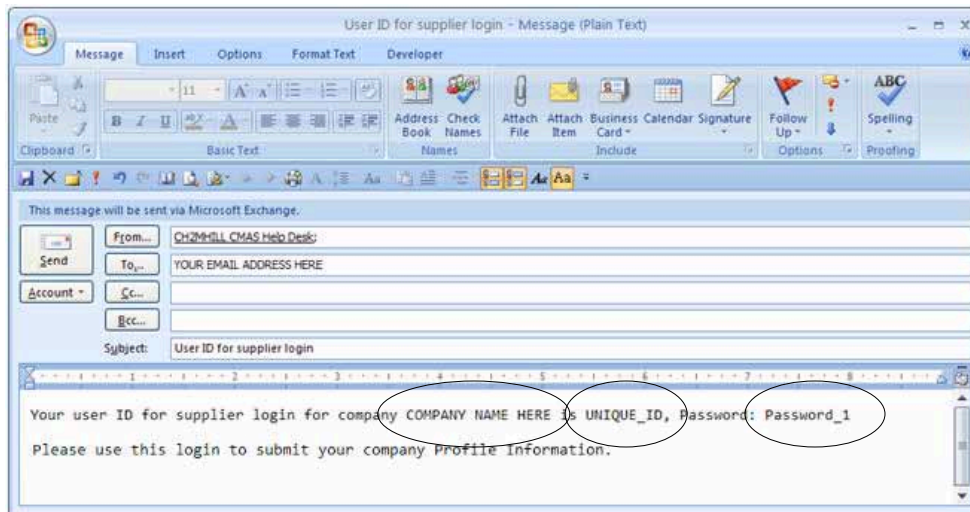
Primary Contact	Password Set	Inactivated	Email	Clear User ID
USER ID for login	<input checked="" type="checkbox"/>	<input type="checkbox"/>	valid_email_address@your_company.com	<input checked="" type="checkbox"/>

Old Password: New Password: Confirm Password: Change Password

Secret Question: Secret Answer: Submit

You will login to the ePortal system with this ID: Record 1/1 <OBC>

Immediately, an email will arrive (looking something like this) when your Request for Logon has been submitted.



T) At this time you will not be providing a secret question and secret answer.

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P.20.02 Login Requests

Login Requests

Company Information

Company: COMPANY NAME HERE Company Name: COMPANY NAME HERE Ltd. Corporation  Approved

Company Type: SUPPLIER Federal ID/Business Registration: 9876543211  Submitted

Primary Address

Address: 789 Fred Street, Suite A

City: Tucson

Country Code: US Country Description: United States of America

State or Prov: AZ

Zip Code: 85655-5555

Contact Details

USER ID (for login)	Contact	Primary	Password	Set	Deactivated	Email	Client User ID
UNIQUE_ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	valid_email_address@your_company.com	UNIQUE_ID

Old Password: New Password: Confirm Password:

Secret Question: Secret Answer:

You will login to the ePortal system with this ID: Record: 1/1

U) Check all entries for accuracy, 1. click the Submit button to submit your login data to our system.  
2. A confirming message will open. Whether you wish to continue to Step 2 (Company Profile); Click Yes to continue, or No to return to the login screen.

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P.20.02 Login Requests

Login Requests

Company Information

Company: COMPANY NAME HERE Company Name: COMPANY NAME HERE Ltd. Corporation  Approved

Company Type: SUPPLIER Federal ID/Business Registration: 9876543211  Submitted

Primary Address

Address: 789 Fred Street, Suite A

City: Tucson

Country Code: US Country Description: United States of America

State or Prov: AZ

Zip Code: 85655-5555

Contact Details

USER ID (for login)	Contact	Primary	Password	Set	Deactivated	Email	Client User ID
UNIQUE_ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	valid_email_address@your_company.com	UNIQUE_ID

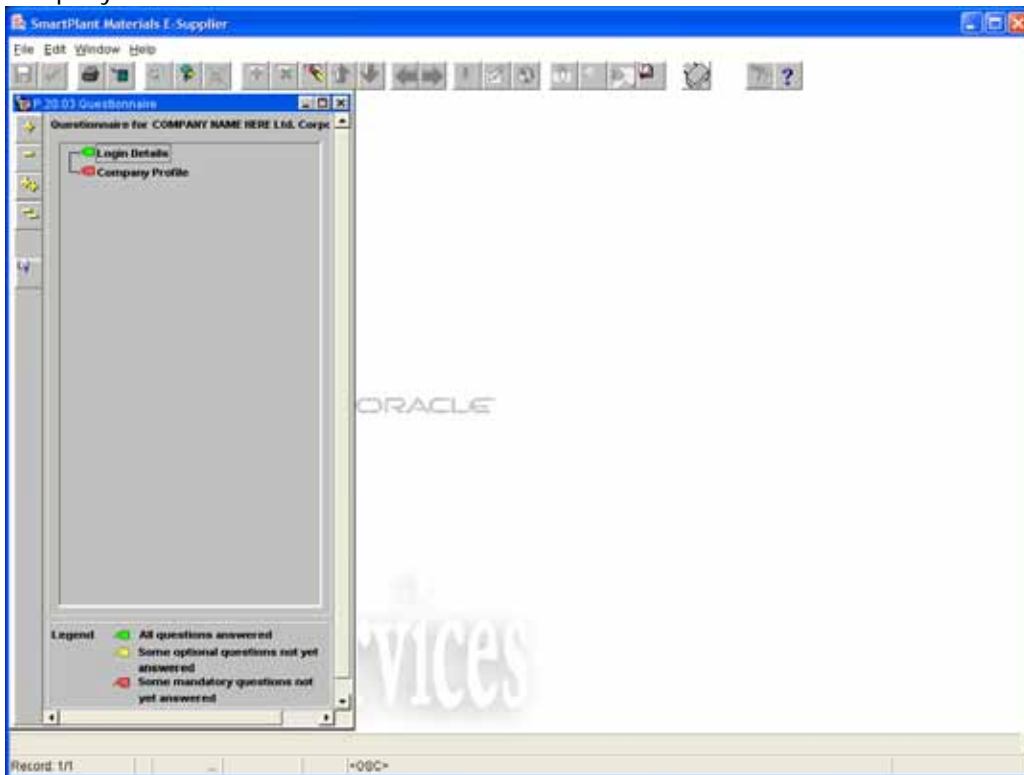
Old Password: New Password: Confirm Password:

Secret Question: Secret Answer:

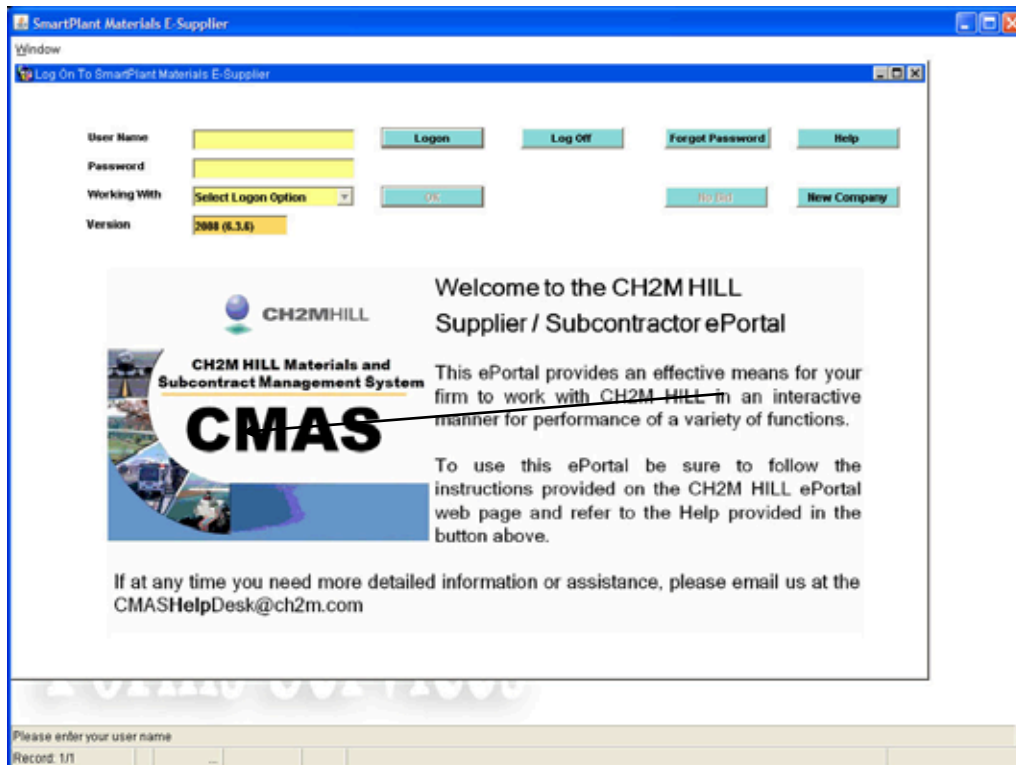
Note: Your user ID and password have been sent to you. Do you wish to continue with the next step?

You will login to the ePortal system with this ID: Record: 0/1

On 'Yes' – you will see this screen, which will allow you to continue answering questions in Step 2 – Company Profile



On 'No' - the screen closes and you will be returned to the login screen. You may close this screen by clicking on the red "X" or clicking the Log Off button.

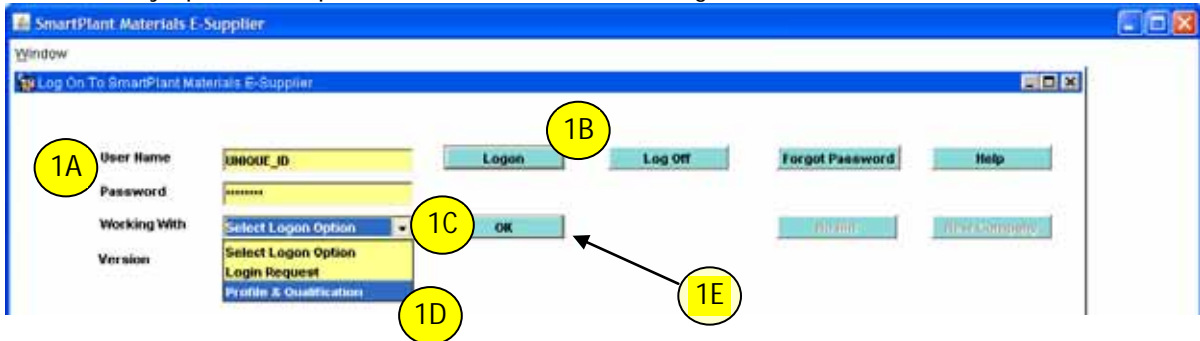


You are now able to log back into the ePortal portal at a later time to submit a Company Profile and, only after approval, the Qualifications information for your company.

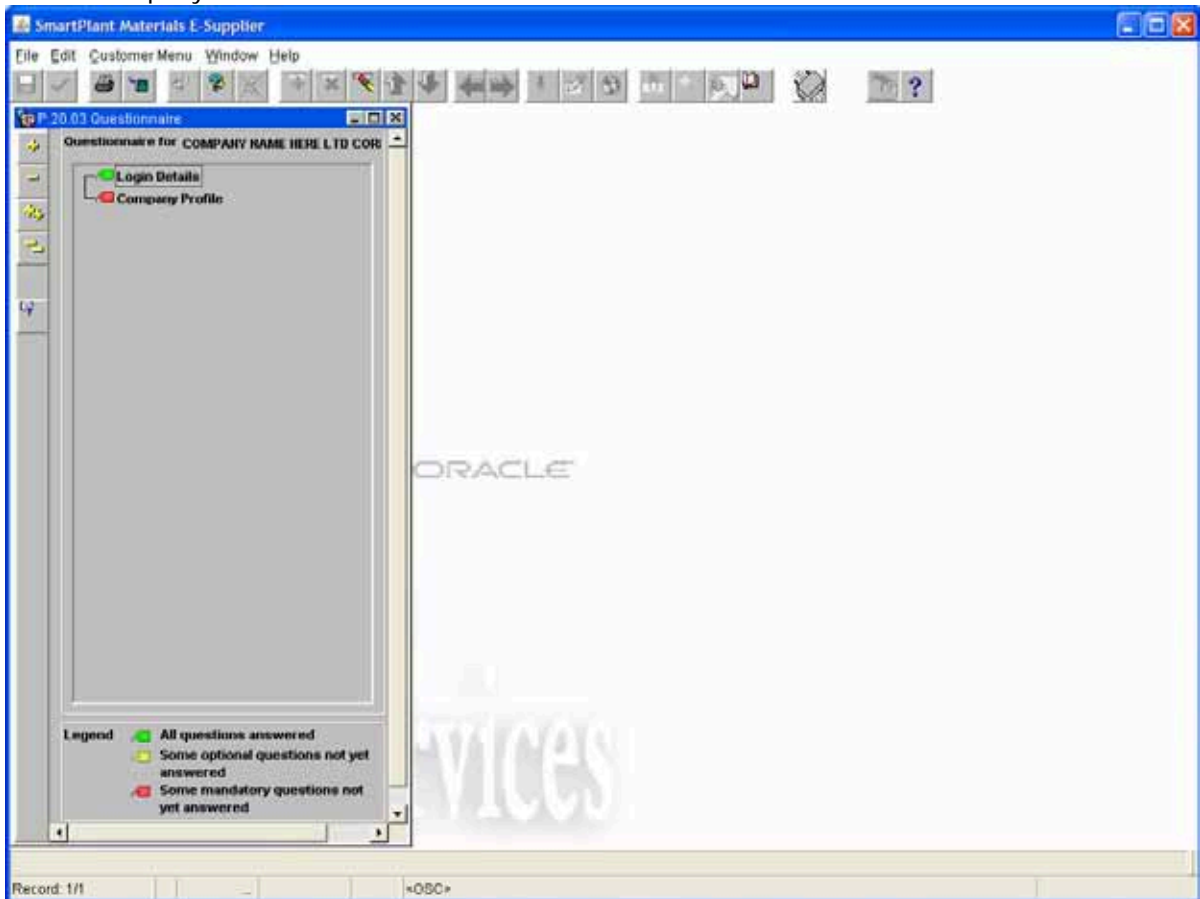
# Submitting a Company Profile

## Login to Create a Company Profile

- 1) A. Enter your *User Name* and *Password* (from the email sent); B. Click the Logon button C. use the pull down arrow next to the *Working With* entry to D. select Profile & Qualification, if the screen does not automatically open, do step E. click on the *OK* button to login.

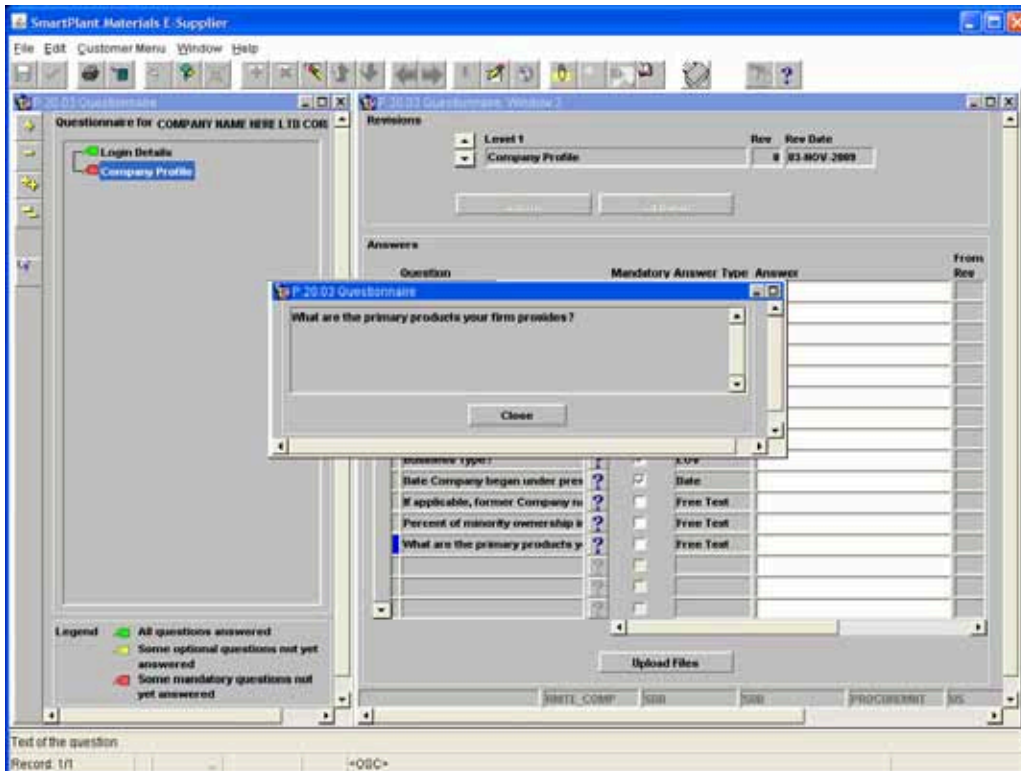


- 2) The following menu tree appears on the left. The legend explains the various colors. It is appropriate to have 'yellow' entries when you have completed a section, since certain optional questions will not meet your company's criteria. It is only red entries that prevent submitting. To begin, click on the red tag next to Company Profile.

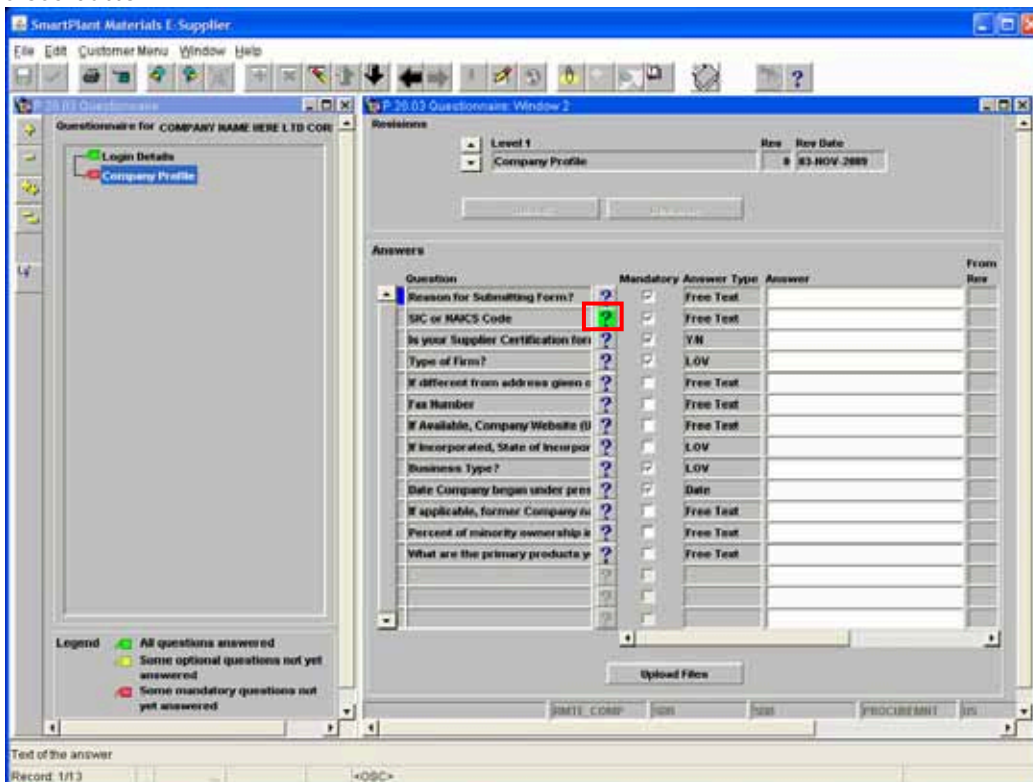


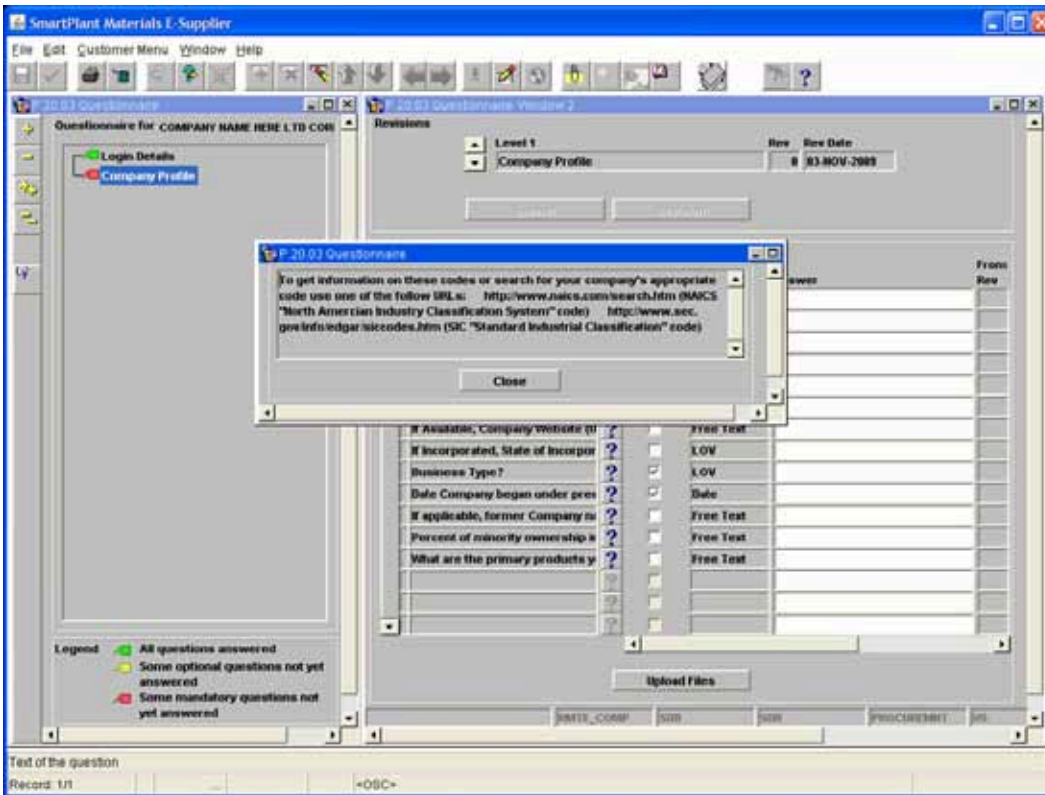
- 3) The layout shows all questions pertaining to this section, a check in the Mandatory column will determine whether the question must be answered before submittal, and how to format your question. The white field is where you enter your answer; a revision field is available (if you submit an update to your original submission.) If documentation is required (for upload) this box is checked, and finally a brief description of the type of documentation we expect you to upload.

In order to read the complete question, click into the Question field. This automatically opens up a dialog box with the entire question visible (scroll bars allow you to read an especially long question), once read, click the Close button.

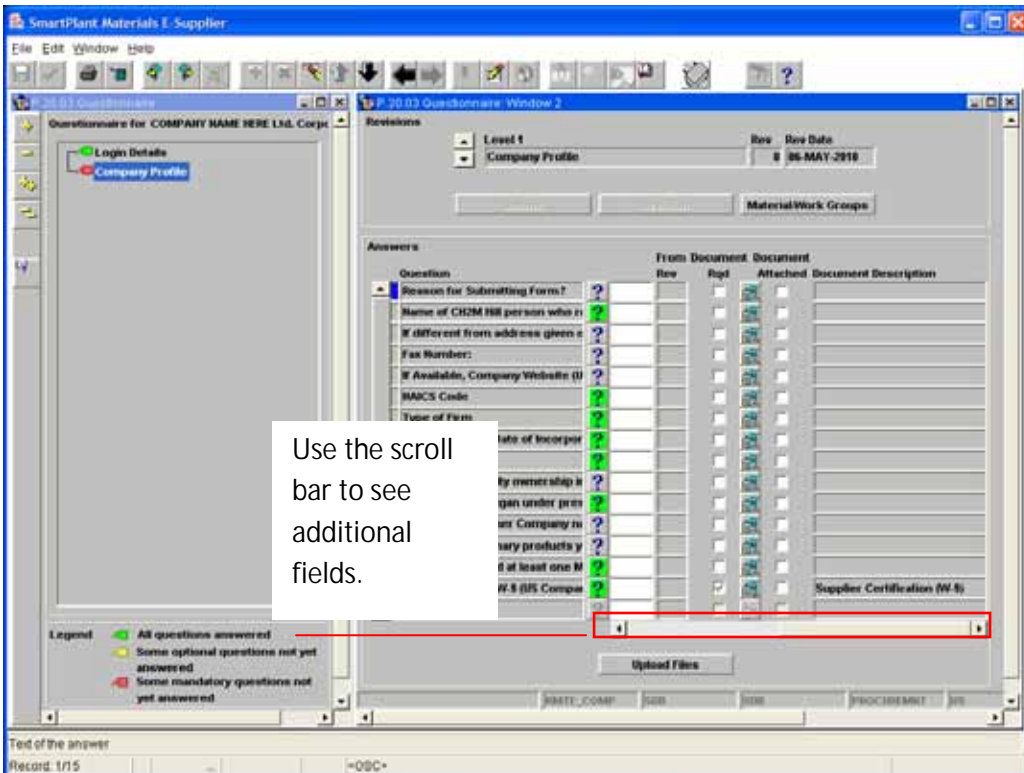


A green question mark indicates additional information is available for this question, once read, click the Close button.






There are additional fields to the right, including which questions have mandatory uploads. Use scroll bar to view these.



4) *Answer Type* will dictate the expected answer format.

**Free Text** – type your answer in the white field

**LOV** – click on the blue arrow  in the tool bar, or use your F2 (function key) to bring up the list of values; select an answer from the list and click OK

**DATE** – Use the LOV to pull up a calendar, or enter in format DD-**MMM**-YYYY (14-Feb-2009)




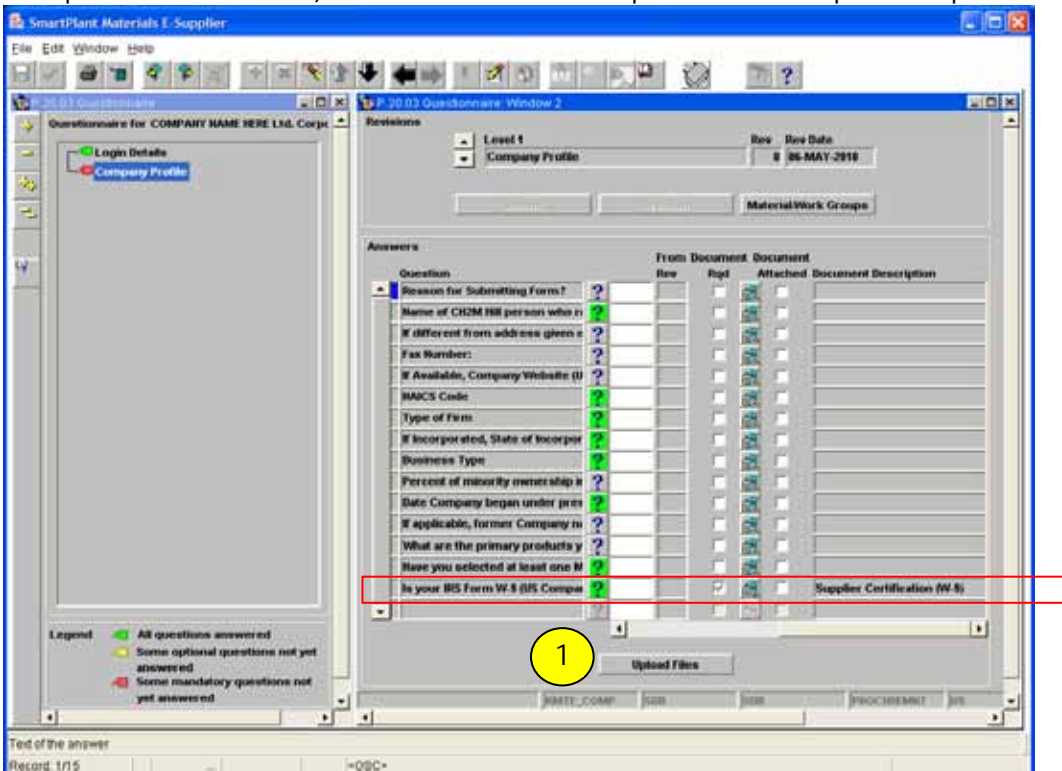
To change the year use right hand calendar buttons (left arrow to decrease, right arrow to increase), to change the month, use the left buttons. Click on the appropriate day of the month, and then click the Ok button. If you prefer, you may directly enter the date using the above format (DD-**MMM**-YYYY).

**NUMBER** – Enter a numeric answer (no '\$' or ',' please)

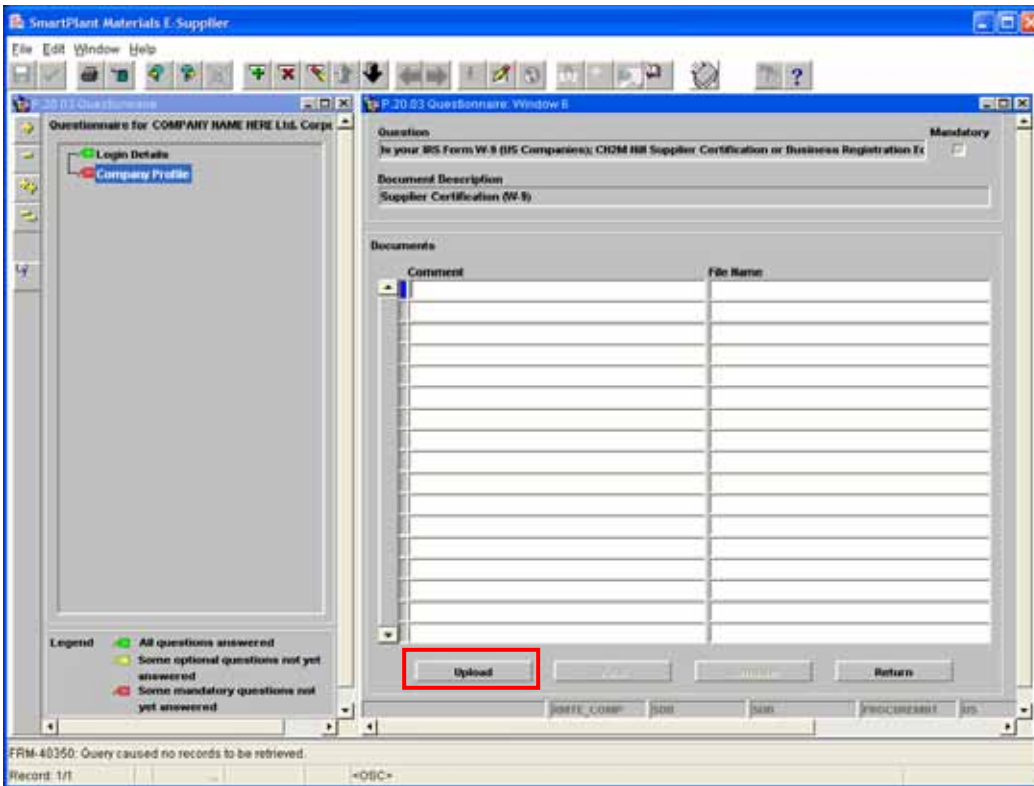
**Y/N** – Either Y for yes, or N for no

5) See PAGE 24 of this guide for entering Material/Work Groups

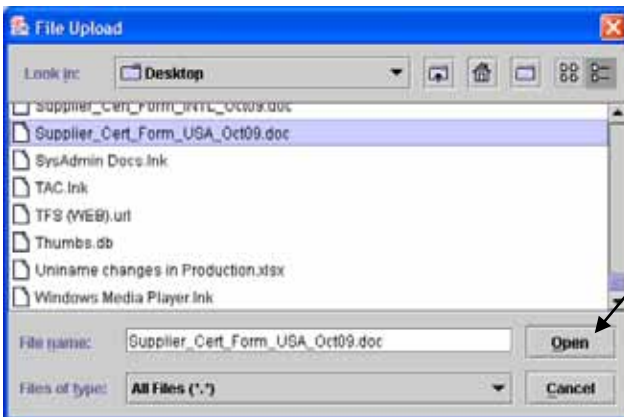
6) If an external document is required the Document Rqd will be checked. You have two ways of uploading the attachment; 1) put your cursor in the Answer field of the question requiring the attachment and click the Upload Files button. 2) Click the icon  on the question row to open the Upload screen.



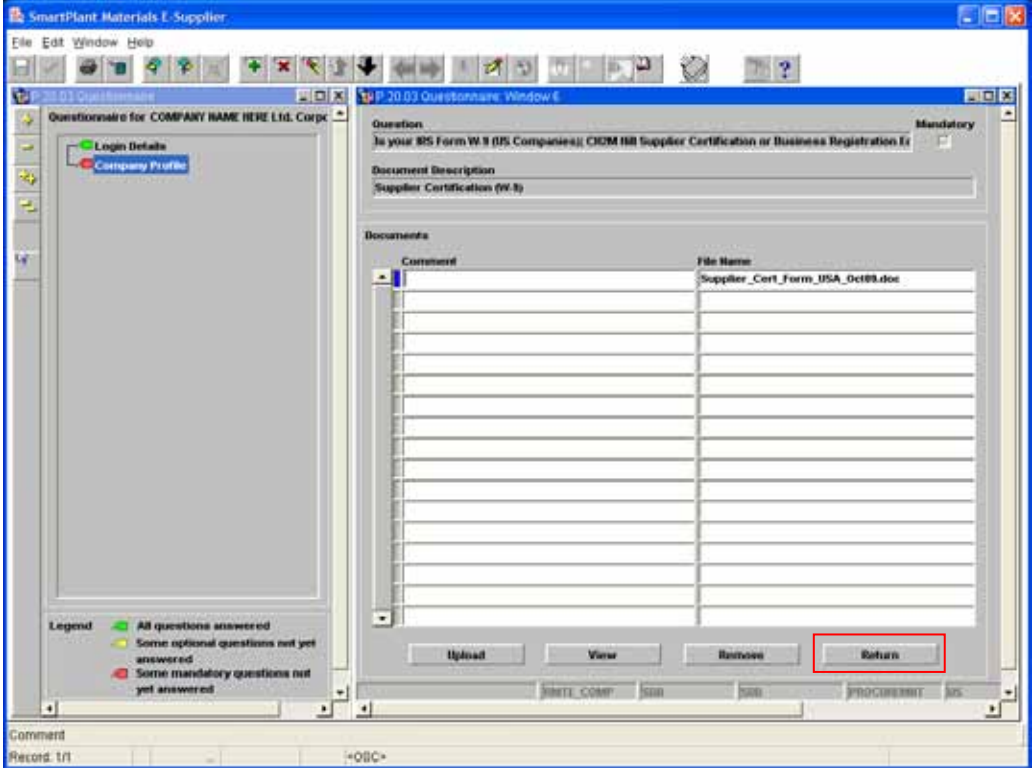
**NOTE:** There is a one-to-one relationship between a question and its required attachment. You will never have more than one attachment (or upload) on ANY question in the entire questionnaire.



Clicking the *Upload* button opens a navigation screen. Use the Browse... button to locate your document, highlight the appropriate file and click on the *Open* button.

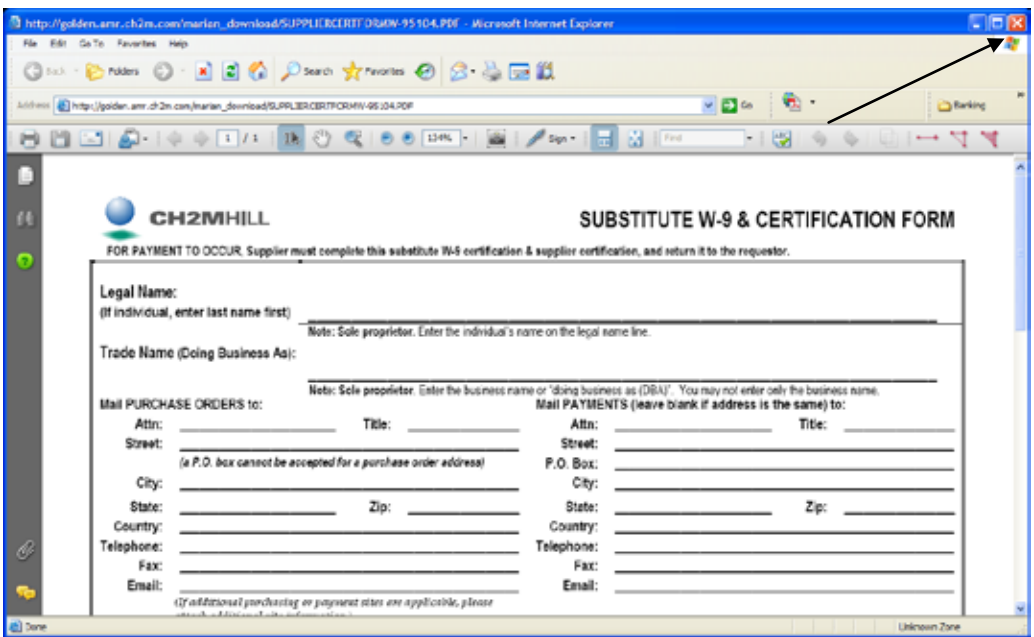


- 7) You may now view or remove a document that you have previously uploaded by clicking on the row of the document you wish to view/remove, then click the appropriate *View* or *Remove* button.

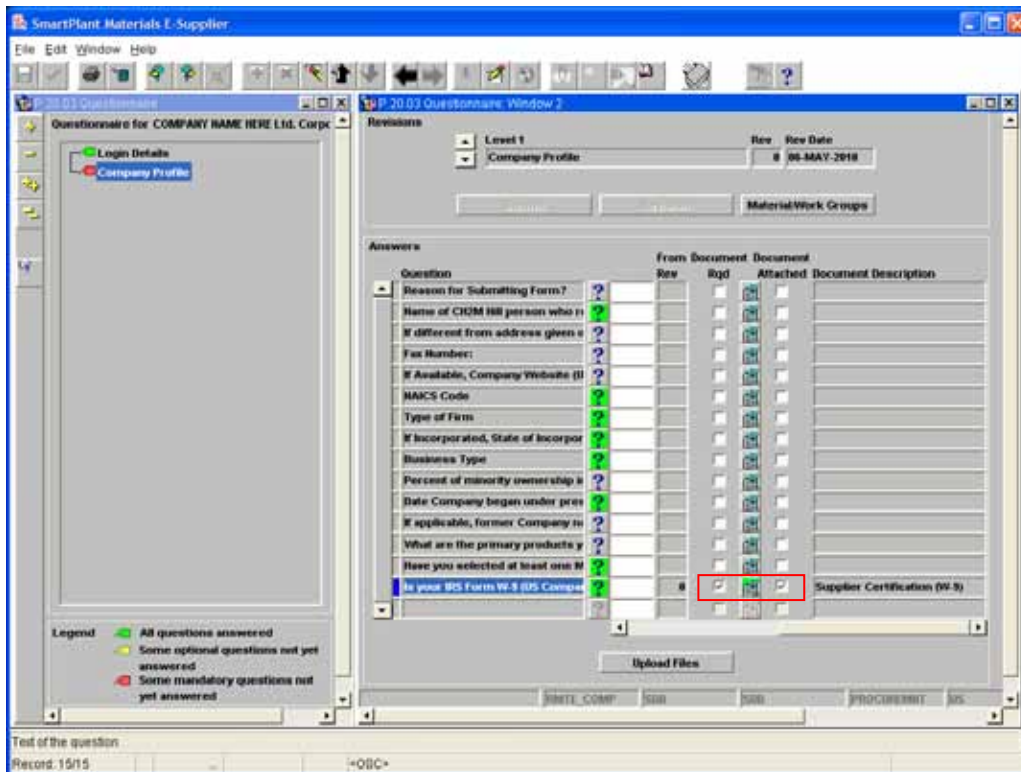



Click the Return button to close this screen and return to the question list.

If you have uploaded a PDF document, it will appear in an Adobe window when viewed. Close the window by clicking the red X.



Notice that after Uploading your document – the icon shows green and the Document Attached tick box is now marked with a check.



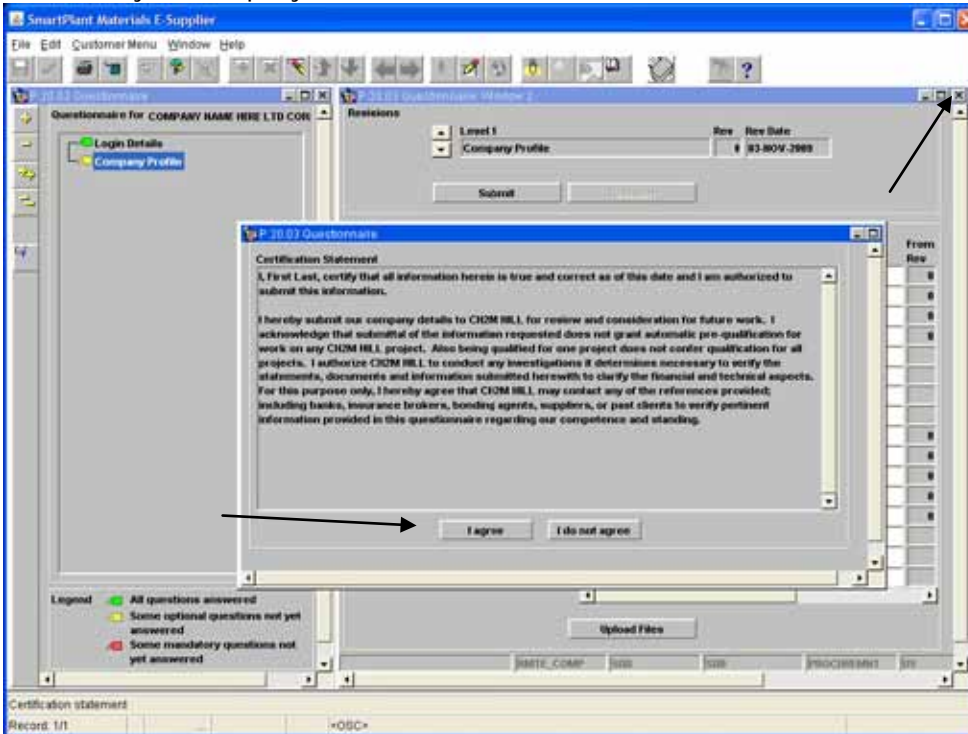
- 8) Once you have answered all mandatory questions (all tags now are either green or yellow), save your responses using the blue disk icon  in the tool bar or by holding down the ALT+S keys.
- 9) Finally, Submit your answers, using the now active (black instead of grey) *Submit* button.



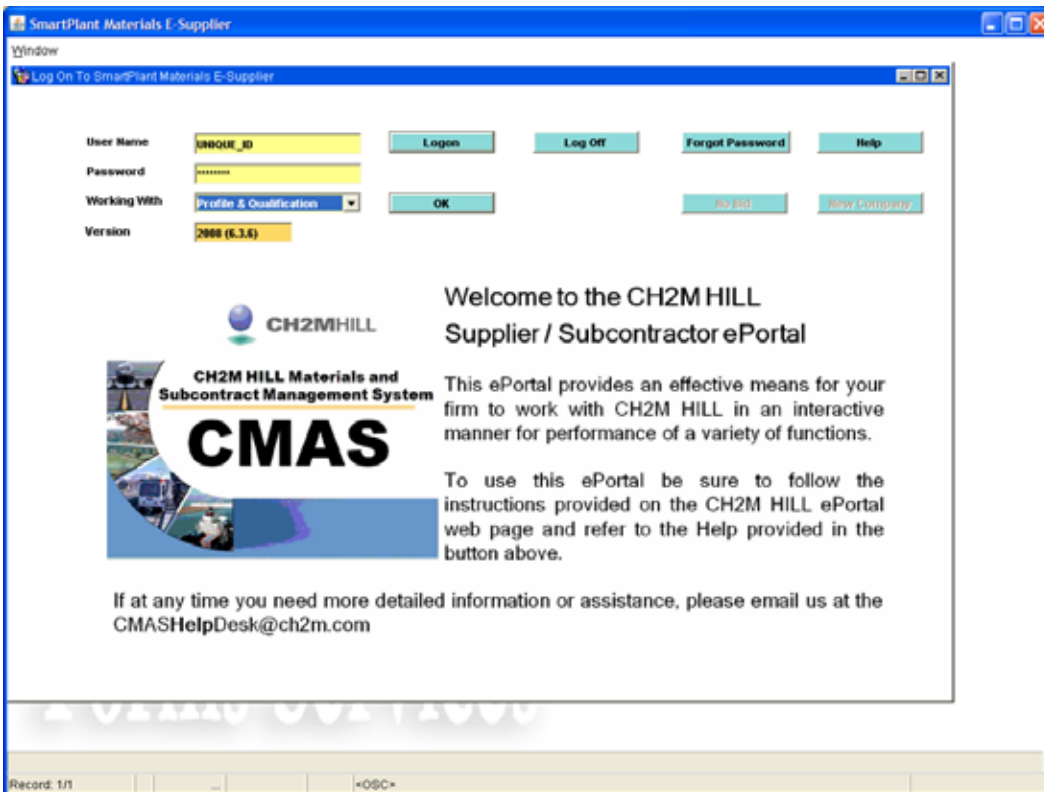
After submission, you may revise any or all of your answers – but first you must click the **Revision** button. Save your updated information and click the *Submit* button again to write your updates to our database.



- 10) The last step in submitting a company profile is to respond when the certification dialog box opens. Click the *OK* button if you can certify that the answers you have provided are true and you are authorized to answer for your company.



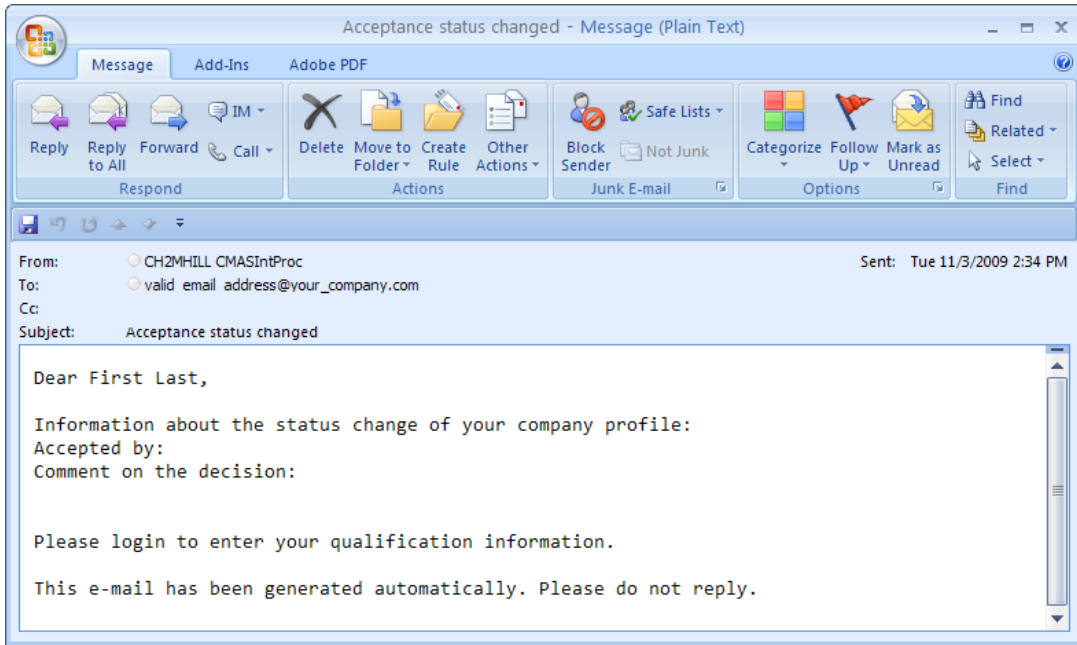
- 11) Close the screen by clicking on the (now) black X in the upper right corner. This returns you to the login screen.



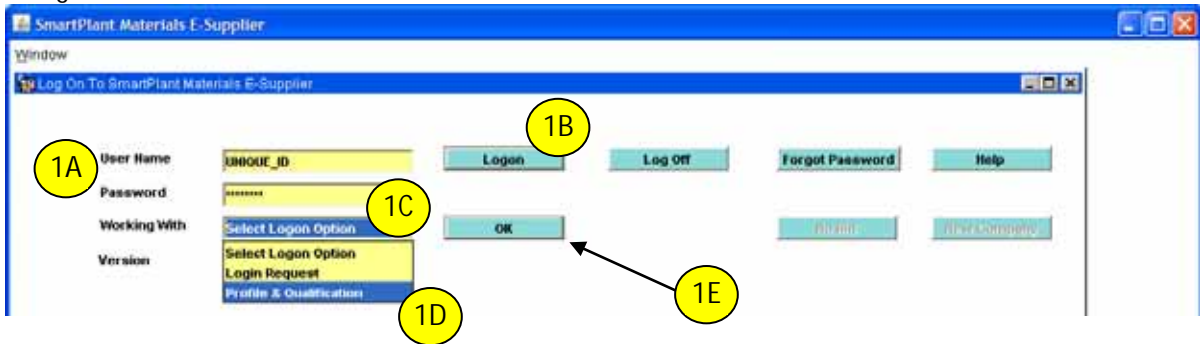
You will receive a status message if/when you Company Profile is approved instructing you to log in and complete the final registration step - Qualifications.


# Submitting Company Qualifications

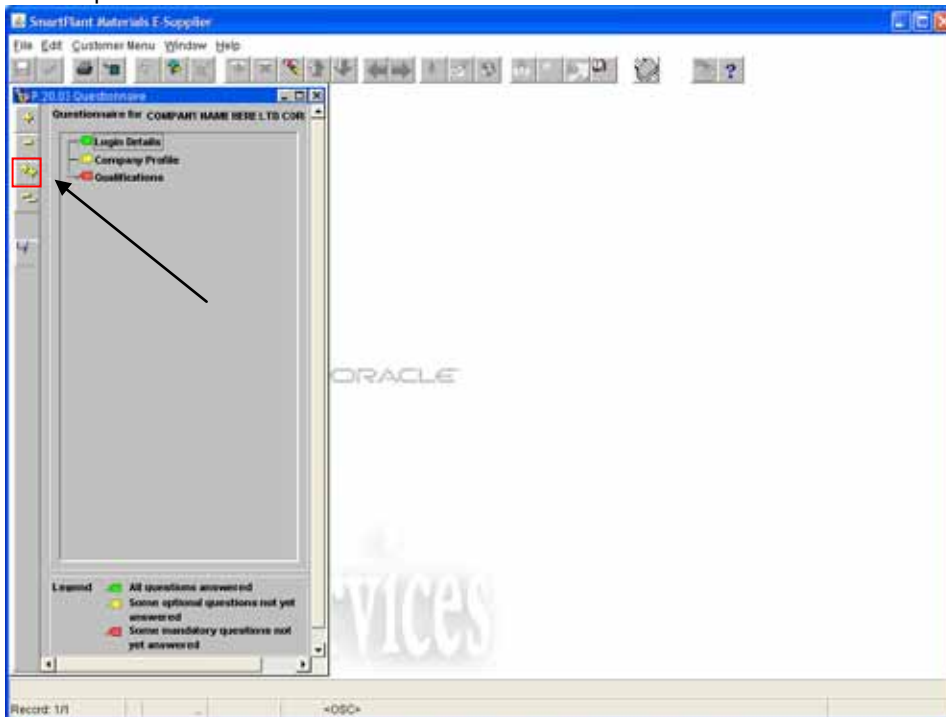
You may proceed with entering your company's qualifications after you receive a similar email.






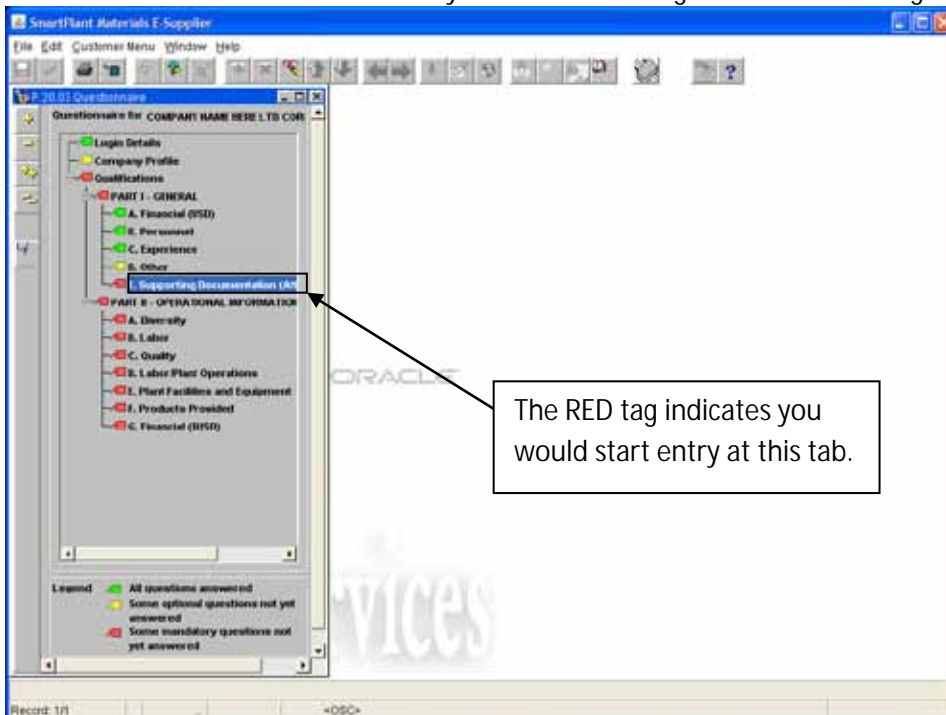
- 1) A. Enter your *User Name* and *Password* (from the email sent); B. Click the Logon button; C. use the pull down arrow next to the *Working With* entry to D. select Profile & Qualification, E. click on the *OK* button to login.



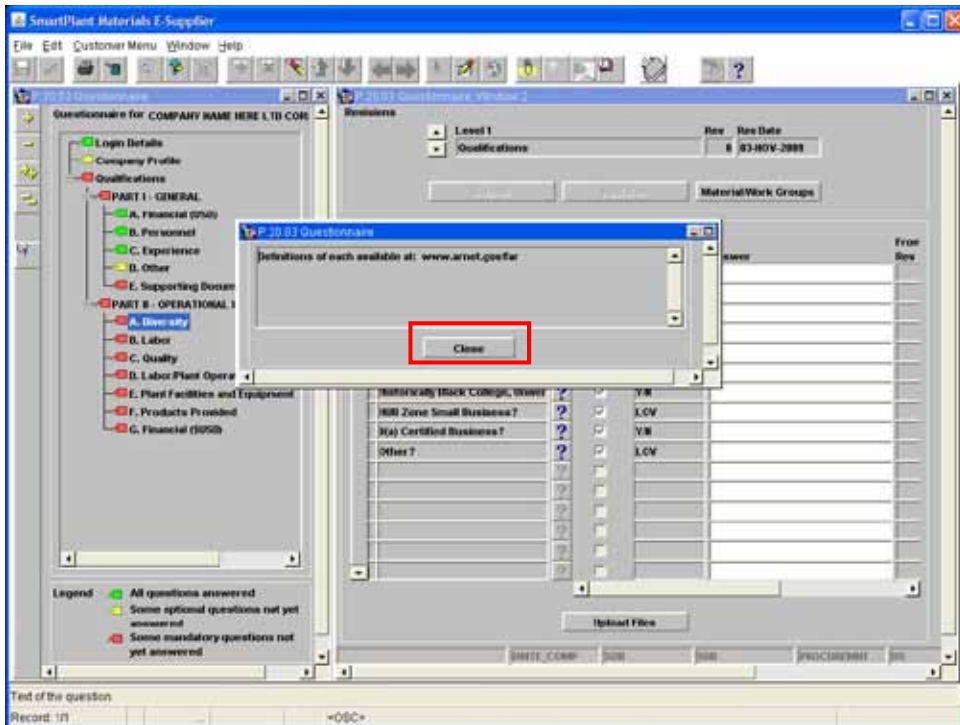
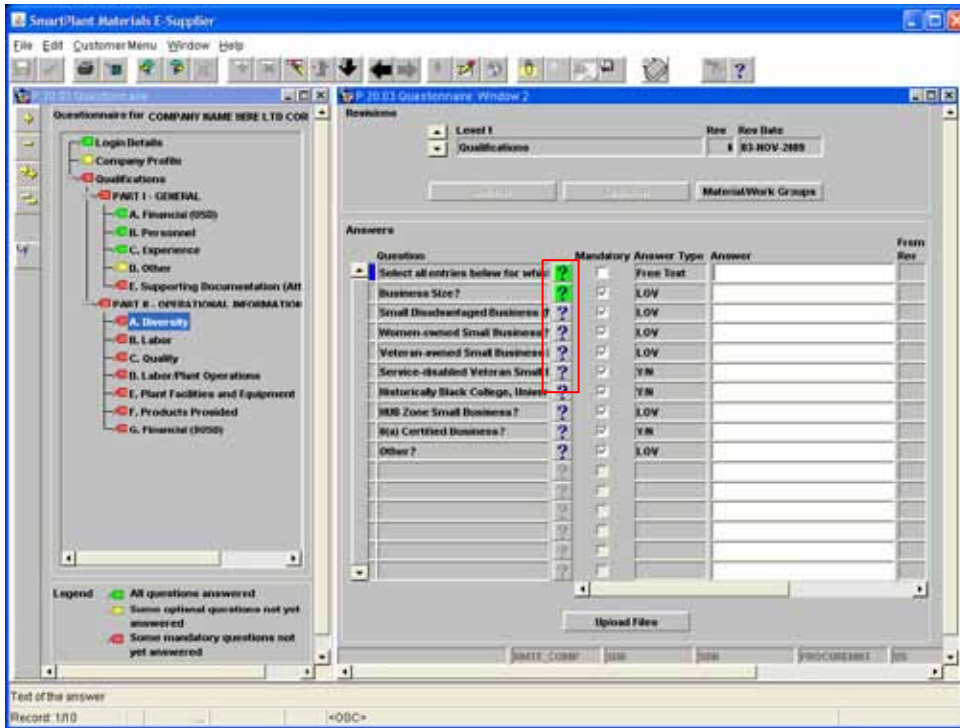
- 2) To prepare for entry, click the double plus  to expand all possible entries, or it will appear as if there are no questions to answer.



Shown below is the tree after some entries are filled out (PART I: A, B, C), some show all mandatory entries are complete  and some optional are unanswered  (PART 1: D) and finally the remaining entries needing completion  (PART 1: E, etc.). This will be helpful if you must save and exit CMAS/ePortal. It will indicate where you will need to begin when re-entering the system.

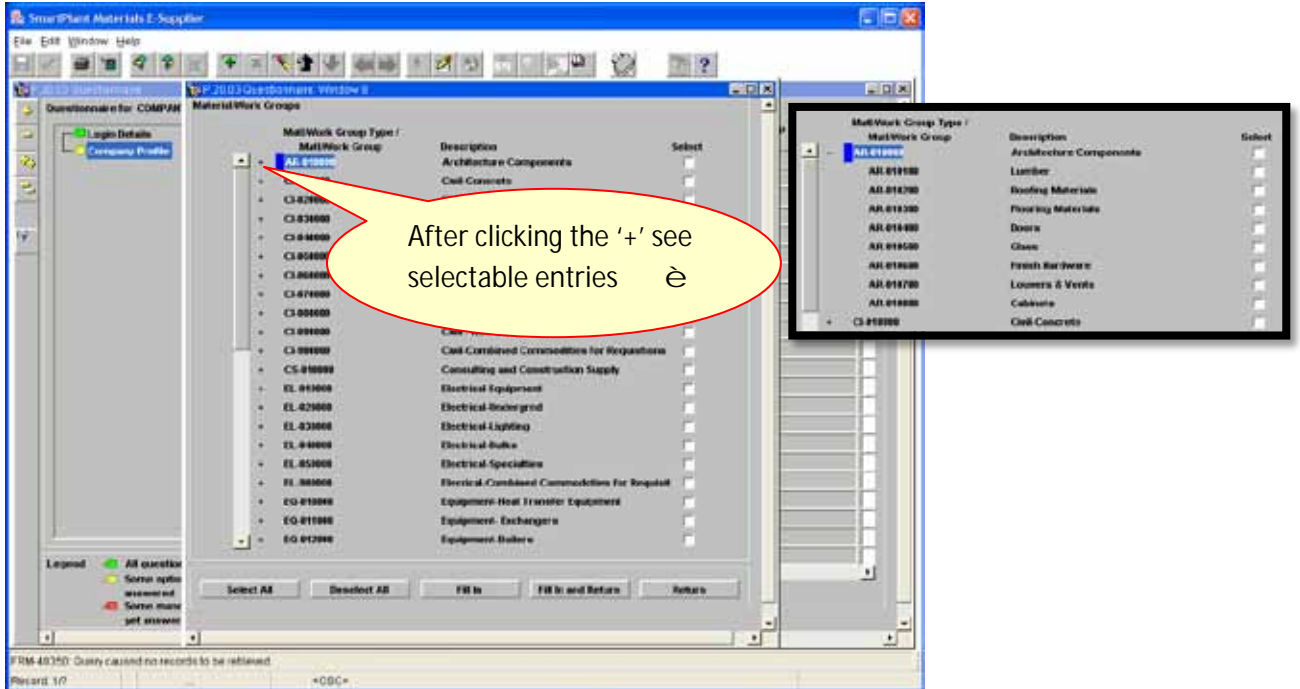


If the "?" to the right of the question is green instead of blue or grey, it indicates there is some help available for this question. Click the "?" if you think it would be helpful to have more information. A dialog box opens, when you have read the help, click the *Close* button.

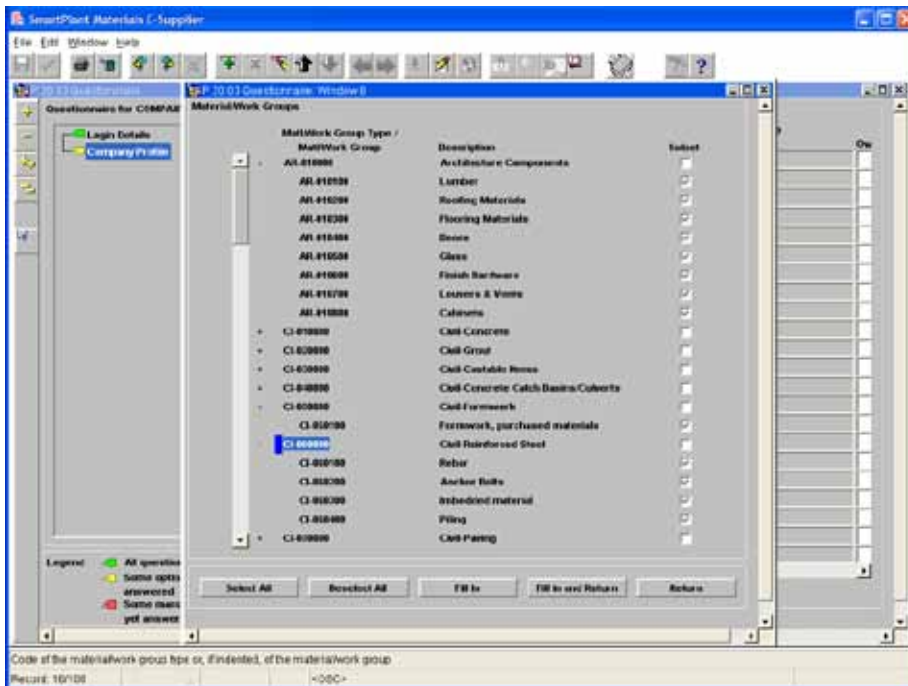


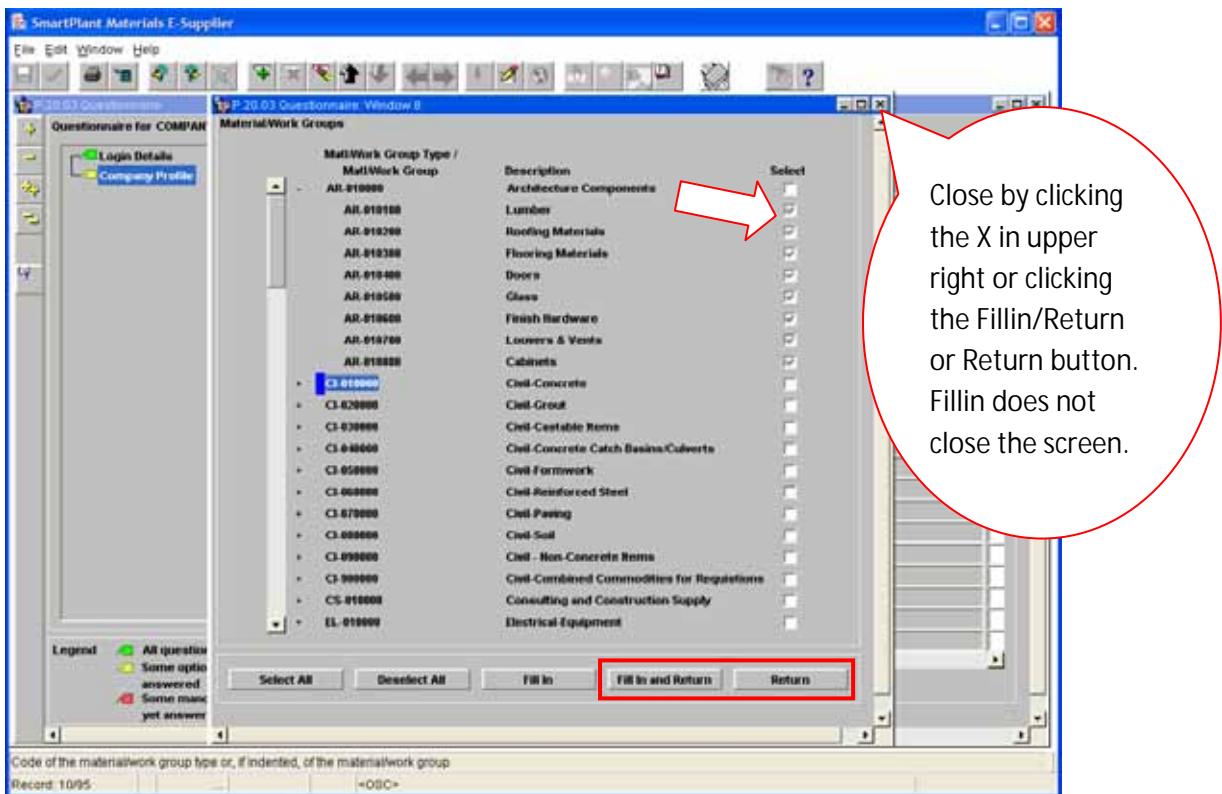
3) To enter your company's Material/Work Groups, click the *Material/Work Groups* button. If it is the first time you have entered this screen, it will open in Selection mode.

**NOTE:** We have reworked the look of this tab (May 2010); notice the '+' next to the entries. Clicking on the plus sign will expand that Group. You may not click the Select button at the top level, you may only select entries after you have expanded the description.

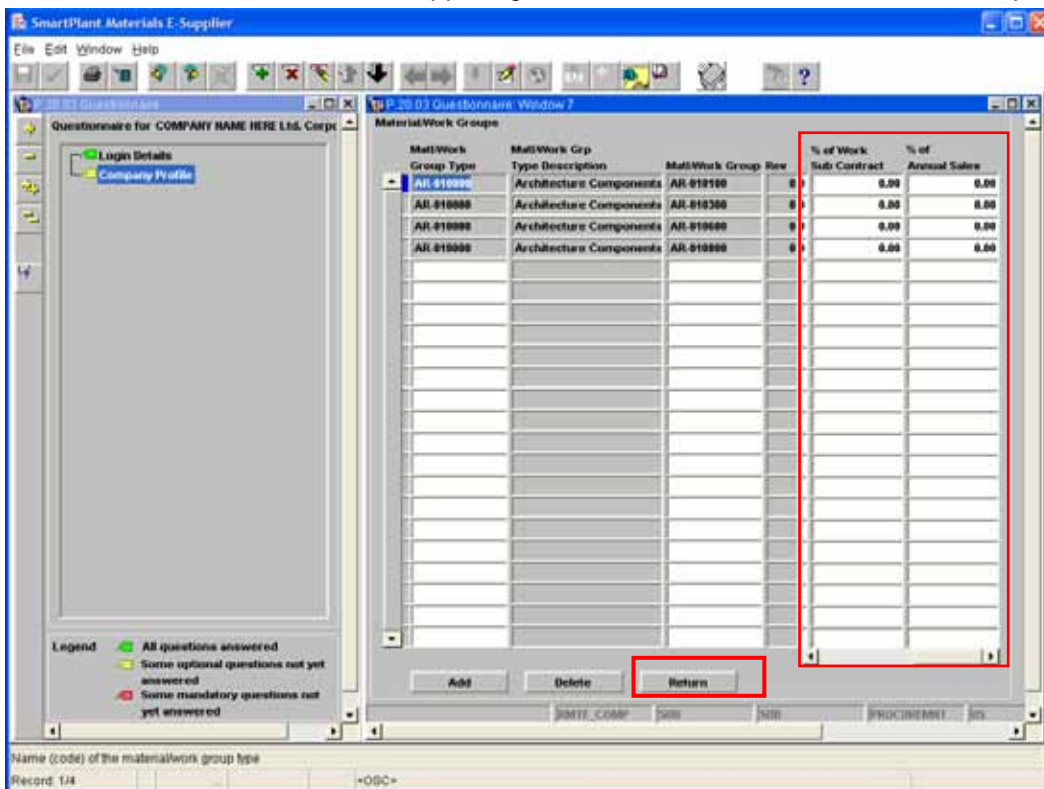


4) Scroll through the list selecting the Material/Work Groups that applies to your company's work/product. When you have selected all applicable entries, click the *Fill In/Return* button to close this screen and populate your choices. Scroll to the far right of the next screen to the appropriate % for each group. Save, then use Return to close the Material Group dialog box and return to the questions list. **BEWARE:** Do not use the Select All button to try and select all entries in a group. Doing this selects all of the 100's of material work groups in the entire LOV. There is no automated way to remove them once they populate the next screen. (Below graphic shows when Select All is clicked...)



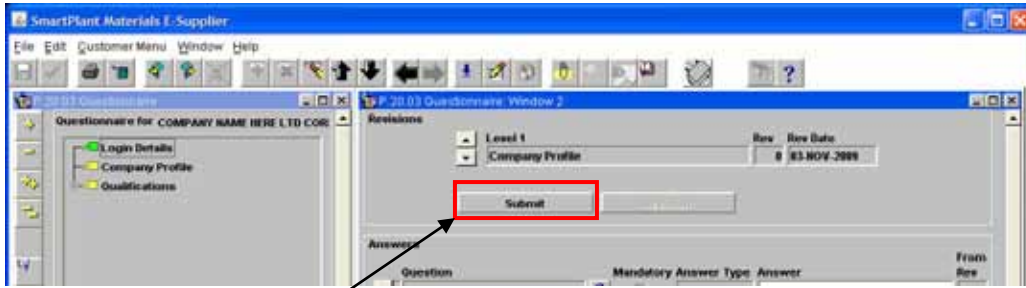


Adjust the % of work done by your own forces vs. subcontract; then % of sales assigned to this group. Use the Return button or the 'X' in the upper right corner to exit the Material/Work Group screen.

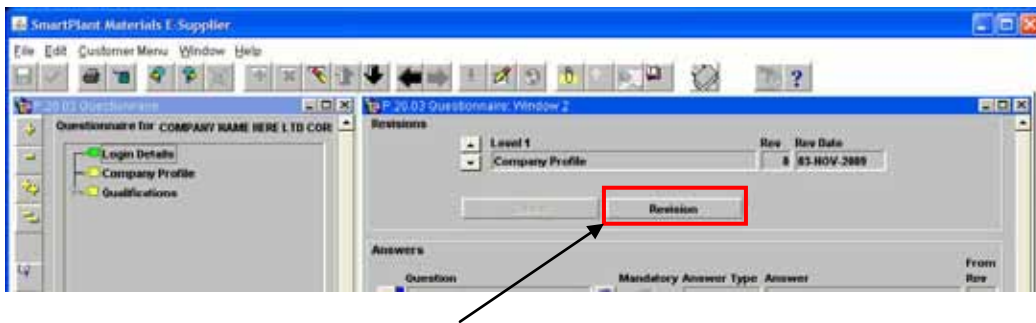


The Add button creates a new line. To populate with a new Material/Work Group, click Add then use the LOV to bring up the selection screen. Select new entry – then fillin/return to populate and return to this screen. Delete will delete the row where you cursor is currently place.

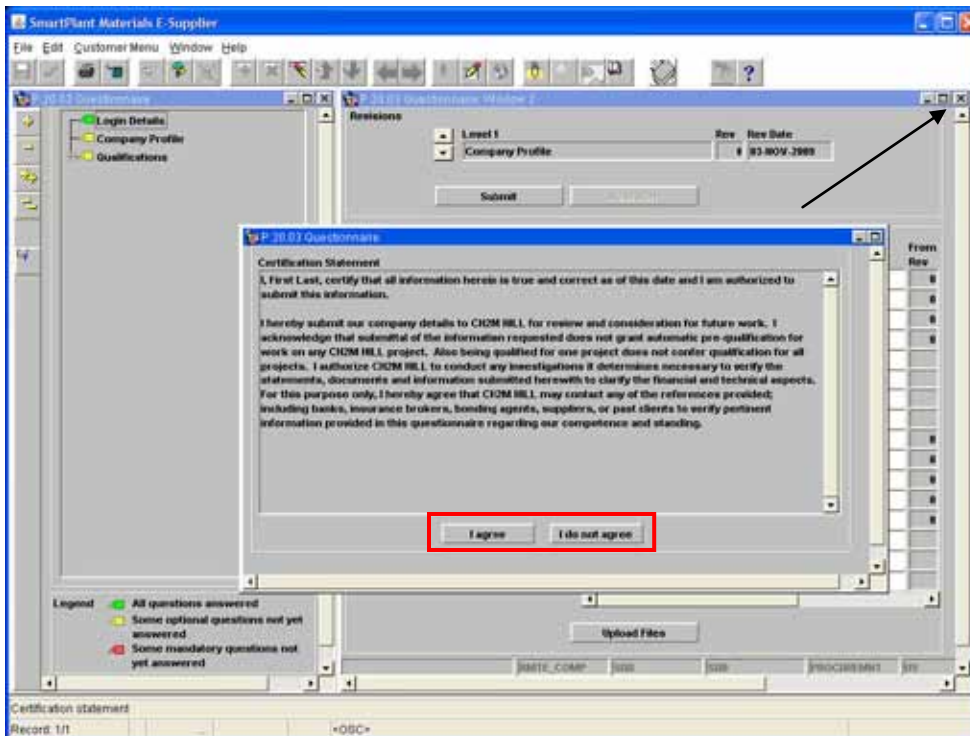
- 4) After completing all entries (the Company Profile tag will be yellow or green) save your work and the Submit button becomes active. Write your information to our database by clicking the *Submit* button once.



After saving, you may revise any answer – but you must click the Revision button first. After saving the updated information save and click the *Submit* button again.



- 5) Read and answer the Certification Statement. You will be returned to the login screen after certifying your answers. This completes the Qualification section.

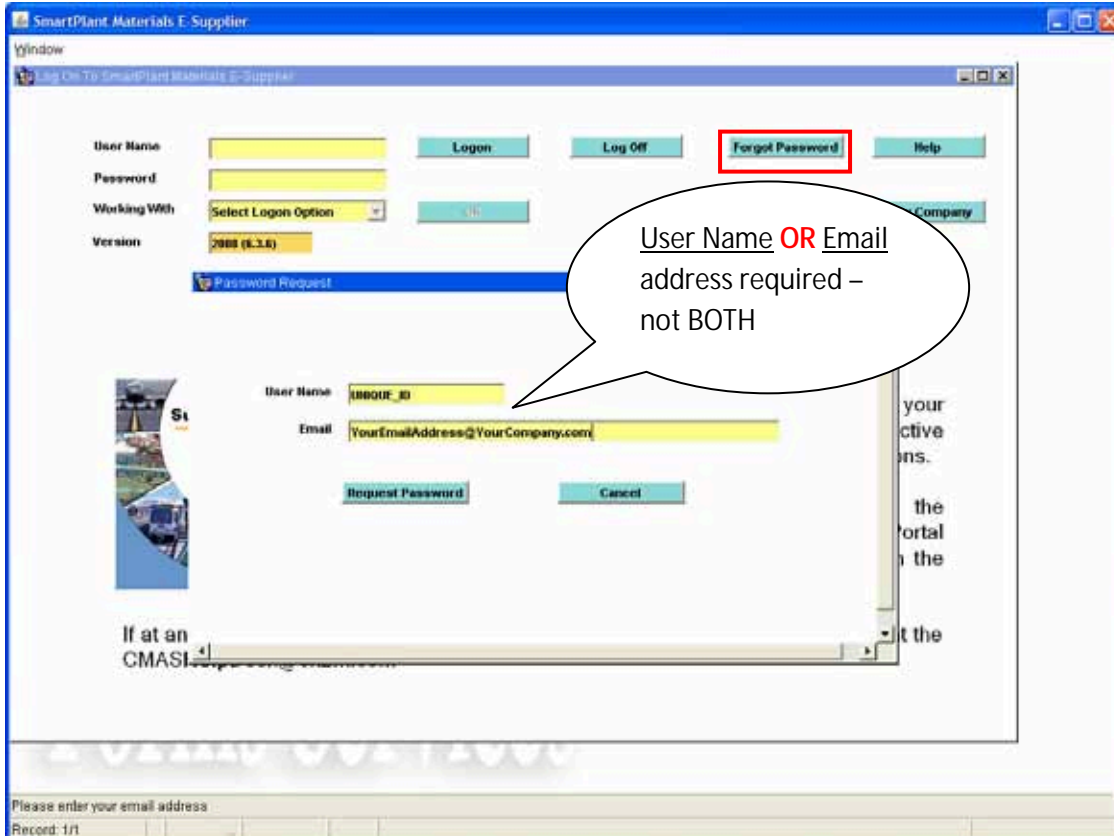


## **Forgot Your Password or User Name?**

From the Logon page, click the Forgot Password button. You only need to enter one of the two fields – either the User Name (if known) or the email address you registered under in our system. Then click the Request Password button. Both your User Name and Password will be sent to the email address we have for you in our database.

Passwords and User Names cannot be redirected to an email address other than the one we currently have in our database.

If the only ePortal user for your company has been terminated and therefore no longer has a valid email address; please contact the [CMASHelpDesk@ch2m.com](mailto:CMASHelpDesk@ch2m.com) with your company name and Federal Tax ID. They will help you setup a new user and password for access.



The screenshot shows the 'SmartPlant Materials E-Supplier' login interface. At the top, there are fields for 'User Name', 'Password', and 'Working With' (with a dropdown menu), along with 'Logon', 'Log Off', 'Forgot Password', and 'Help' buttons. The 'Forgot Password' button is highlighted with a red box. Below this is a 'Password Request' dialog box with fields for 'User Name' (containing 'IBROUR\_ID') and 'Email' (containing 'YourEmailAddress@YourCompany.com'), and 'Request Password' and 'Cancel' buttons. A callout bubble points to these fields with the text: 'User Name OR Email address required – not BOTH'. At the bottom of the window, there is a status bar with the text 'Please enter your email address' and 'Record: 1/1'.