School District of Philadelphia MWBE
Create Hierarchy Trees

## *Guidelines*

Hierarchy Trees are part of the MWBE system which give accountability and visibility into the organization of Suppliers. They show the relationship between Prime, Sub-Prime, and Sub Sub-Prime Organizations that work with and for SDP.
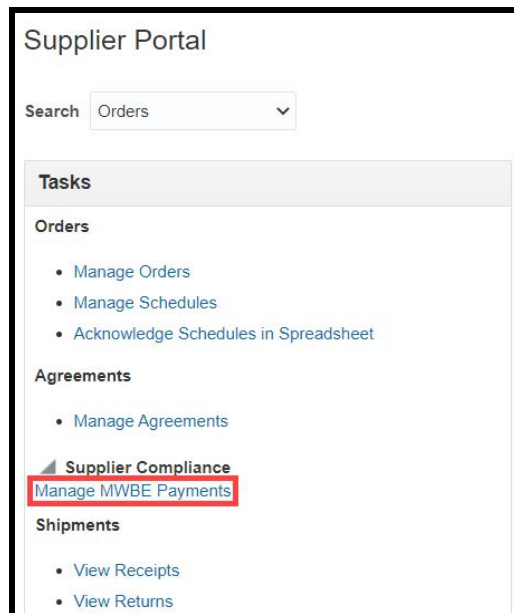
- Organizations have visibility to those Suppliers who are downward on their branch, but do not have visibility across branches
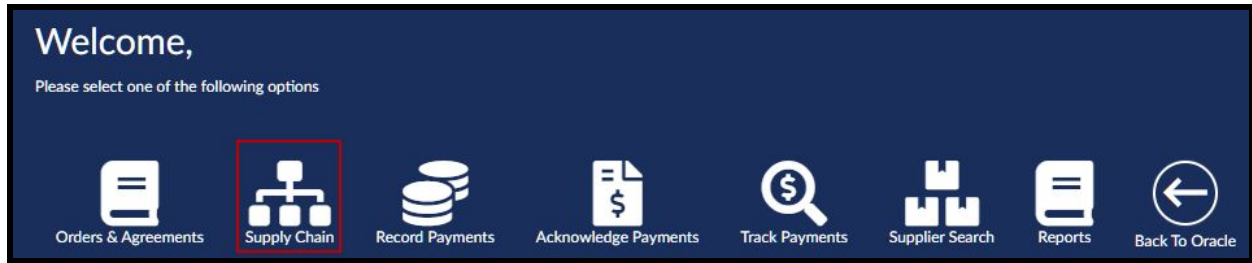-

Navigation

1. While on the Springboard, click the ***Supplier Portal* icon**.
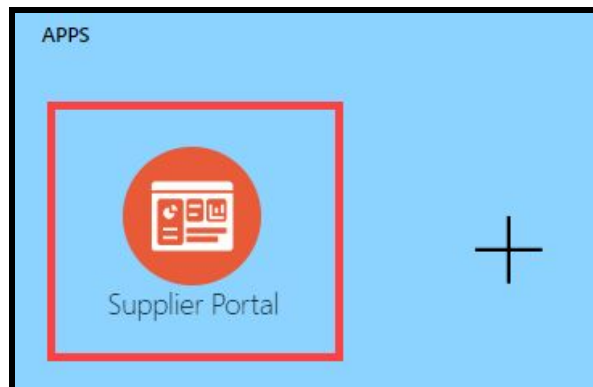
2. When the Supplier Portal has loaded, click on the ***Manage MWBE Payments* Link** in the Tasks Pane on the left hand side of the screen.

3. The MWBE Homepage will load. From here you can access the Supplier Search by clicking the *Supply Chain* icon.

4. From the Manage Hierarchy Trees page, choose the Purchase Document for which you would like to view the Hierarchy Tree and click *Search*.
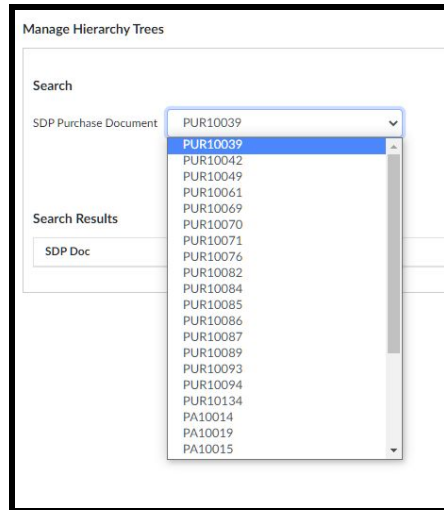
5. The Purchasing Documents information will display. Click the *Navigate to Tree* hyperlink.

6. The Hierarchy Tree for the Purchasing Document will display.

   a. From here there are several actions you can take. The *Expand* button will expand and show the entire Hierarchy Tree and all branches.
      i. If, however, the Hierarchy Tree is fully expanded, clicking the *Expand button* will collapse the Hierarchy Tree.
   b. The ⌄ icon will expand to show those Suppliers who are Sub-Prime to the Supplier next to whose name they appear.
      i. The ⌃ icon will collapse those Suppliers who are Sub-Prime to the Supplier next to whose name they appear.

c. The [i] **icon** will show the Supplier Participation details for that Supplier.

Note: Those Suppliers in a Tree only have visibility upwards and downwards on their branch - not across branches.

Update a Hierarchy Tree

1. With a Hierarchy Tree open, click the Update Button

2. The [folder] [+] and [X] **Buttons** will appear next to all Suppliers in the Hierarchy Tree.

   a. The [folder] **Button** allows you to access the attachment list for the Supplier.

      i. From here you can Open Attachments from the Supplier as well as Add and Delete them.

   b. The [+] **Button** allows you to Add a Supplier to the tree as a Sub-Prime to the Supplier next to whom the button appears.

   c. The [X] **Button** allows you to remove a Supplier from the tree.