



**Kansas City
Board of Public Utilities**

SUPPLIER PACKAGE

STEP 3: ACKNOWLEDGE AND REVIEW PURCHASE ORDERS

Supplier User Guide

May 31, 2006



Vendor Package: Step 3: Acknowledge and Review Purchase Orders

Document Introduction

Kansas City Board of Public Utilities will be providing suppliers with access to review their purchase orders and invoices in the online system. In addition suppliers will be able to acknowledge Purchase Orders.

Contacting Kansas City Board of Public Utilities

The Purchase Order emails include Kansas City Board of Public Utilities contact information should additional assistance be necessary. For your convenience, contact information is included here:

Kansas City Board of Public Utilities

email: esupplier@bpu.com

phone: (913) 573 – 9120

address: Attention: Purchasing

540 Minnesota Ave

Kansas City, KS, 66101



Kansas City Board of Public Utilities

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Vendor Package: Step 3: Acknowledge and Review Purchase Orders

Overview

Kansas City Board of Public Utilities will be providing suppliers the ability to view Purchase Orders, Receipts, Invoices and Payments in our on-line supplier portal. This manual will walk you through the steps required to review these transactions.

A: Setup Supplier Pagelets

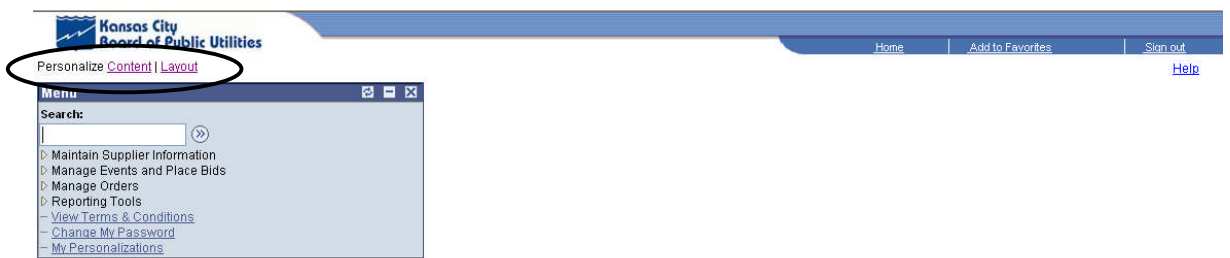
The supplier portal provides the ability to view data in a pagelet, for your convenience we will be providing each supplier with access to the following pagelets.

Pagelet Name	Description
My Sell Events	This pagelet will list all Requests for Quote that a supplier has been invited to.
Recently dispatched purchase orders	This will list in descending order 5 recently dispatched purchase orders.
PO/Receipt Qty Performance	Tracks the percentage and actual quantity of the receipts against the purchase order.
On Time Performance	Tracks the percentage and actual number of vendor shipments that are on-time.
Quantity Performance	Tracks the percentage and actual number of shipments that have the correct quantities.
Quality Performance	Track the percentage and actual number of shipments that are accepted, rejected and returned.



Vendor Package: Step 3: Acknowledge and Review Purchase Orders

Step	Action
1	<p>Login to the supplier portal</p> <p>To setup the pagelets in the portal, you must first be logged into the system. You can log in by going to the following website https://esupplier.bpu.com and logging into the system with the User ID and Password provided to you by Purchasing.</p>
2	Click on the Content Link in the top left hand corner of the page.



powered by **PeopleSoft**

Step	Action
3	<p>Select the pagelets you wish to view on your main page, by checking the box next to each one.</p> <p>See the screen shot below for what your page should look like. Do not uncheck 'Menu', as you will lose access to the main menu pagelet. You can recover from this by checking it once more.</p>



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Vendor Package: Step 3: Acknowledge and Review Purchase Orders

Personalize Content

Choose Pagelets: Simply check the items that you want to appear on your homepage.
Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

Welcome Message:

PeopleSoft Applications

- [Menu](#)
- [My Reports](#)
- [Main Menu](#)

Supply Chain

- [On-Time Performance](#)
- [Quantity Performance](#)
- [Quality Performance](#)
- [PO/Receipt Qty Performance](#)
- [Recently Dispatched POs](#)
- [My Buy Events](#)
- [My Sell Events](#)

 Save

[Return to Home](#)

Step	Action
4	Click on the Personalize Content Link You can personalize how the pagelets are displayed on the main page by changing the options here. The screen shot below shows what a typical setup may look like.



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Personalize Layout

Basic Layout:



Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

Add Pagelets:

Go to [Personalize Content](#)

= Required - fixed position pagelet
* = Required - moveable pagelet

Left Column:	Center Column:	Right Column:
Menu	My Sell Events Recently Dispatched POs	On-Time Performance Quantity Performance Quality Performance PO/Receipt Qty Performance

Navigation icons: up, down, left, right arrows.

Delete Pagelet

Save

[Return to Home](#)



Vendor Package: Step 3: Acknowledge and Review Purchase Orders

Step	Action
5	Click on the Save Button Clicking on Save will return you to the main portal page, and your new pagelets will display.
End	You have now successfully completed setup of your pagelets.

The screenshot displays the vendor portal interface for the Kansas City Board of Public Utilities. At the top, there is a navigation bar with the logo, a search field labeled "Enter your Name Here", and links for "Home", "Add to Favorites", and "Sign out". Below the navigation bar, there are several pagelets:

- Menu:** A sidebar menu with a search field and a list of navigation options: "Maintain Supplier Information", "Manage Events and Place Bids", "Manage Orders", "Reporting Tools", "View Terms & Conditions", "Change My Password", and "My Personalizations".
- My Sell Events:** A pagelet with a search field for "Event Name" and two links: "Test new event pdf" and "See all of my events".
- Recently Dispatched POs:** A pagelet showing "Sample Vendor" and "No Recent POs".
- On-Time Performance:** A pagelet showing "Sample Vendor" and "No Data for Vendor." with a "Detail" link.
- Quantity Performance:** A pagelet showing "Sample Vendor" and "No Data for Vendor." with a "Detail" link.
- Quality Performance:** A pagelet showing "Sample Vendor".



Vendor Package: Step 3: Acknowledge and Review Purchase Orders

B: Review and Acknowledge Purchase Orders

Step	Action
1	Search for Purchase Orders to Acknowledge Navigate to: Manage Orders > Acknowledge Purchase Orders Or Click on the 'New' link in the Recently Dispatched PO's pagelet.
2	In the Search/Filter Acknowledgements page enter the search criteria and click on the ' Search ' Button.
3	Click the PO number that you wish review/acknowledge

Menu

Search:

- Maintain Supplier Information
- Manage Events and Place Bids
- Manage Orders
 - Purchase Orders
 - Acknowledge Purchase Orders**
- Reporting Tools
 - View Terms & Conditions
 - Change My Password
 - My Personalizations

Acknowledge Purchase Orders

Search/Filter Acknowledgements

Sample Vendor:

From PO ID: To PO ID:

From Date: 06/26/2006 To Date: 07/26/2006

Buyer:

Vendor Location:

Current Acknowledgements
 Supplier Respond/Buyer Accept

View History

PO Acknowledgement List


Purchase Order	Dispatched Date/Time	PO Status	Acknowledgement Status	Acknowledge Date	Source of Acknowledgement	POA Required
0000009293	07/26/2006 7:37:06AM	Dispatched	New			Yes



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Recently Dispatched POs			
Sample Vendor			
<u>PO ID</u>	<u>Dispatched Date/Time</u>	<u>Status</u>	<u>Acknowledge Status</u>
0000009293	07/26/2006 7:37:06AM	Dispatched	New
Show all/Enhanced...		Show All Acknowledgements	

Step	Action
4	The Acknowledge Purchase Order Page appears. You can expand the various sections by clicking on the Arrow  Button next to each Section.



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Vendor Package: Step 3: Acknowledge and Review Purchase Orders

Acknowledge Purchase Orders

Acknowledgement Summary

Sample Vendor

PO Number: 0000009293
Acknowledgement Status: New
POA Response: Accepted

PO Date: 07/26/2006
Acknowledge Date:

[Reset to PO Values](#) [Reject All](#)

PO Header Detail

Contact:

Currency Code: US Dollar
Rate Type: Current Rate

Payment Terms: Net 30

Reference Information:

Standard BU Comments

Purchase Order Number must appear on all Shipping Notices, Invoices, and Correspondence.

This Purchase Order is issued in accordance with BPU's Standard Terms and Conditions unless otherwise noted.

Click on the purchase order line number to see more details and to make any modifications.

POA Lines

Line	Item ID	Description	PO Qty	Acknowledge Quantity	UOM	POA Response
1	0640680	Valve 1" Gate Brass 150# Threaded Usage General	12.0000	12.0000	EA	Accepted
2	0670216	Coupling 1/4" Pipe Standard Black Usage General	24.0000	24.0000	EA	Accepted

Comments

[Save](#) [Save & Send Acknowledgement](#)

[Return to Search Acknowledgement](#) [Send E-mail](#)



Vendor Package: Step 3: Acknowledge and Review Purchase Orders

Step	Action
5	Click on the Line number to view the details of each line. For each line you can view the Due Date, Quantity, Price and Shipping Method. These fields are editable, so that you may update them and the system will send a notification back to purchasing for review.
6	After you have reviewed the line item and made any necessary changes click on the left and right arrow First <input type="button" value="1 of 2"/> Last buttons to cycle through the purchase order lines. If you do not wish to supply an item you can click the Reject Item Button and this line item will be cancelled by purchasing. Clicking on the Reset Item to PO values will reset this line item to the original values as defined on the purchase order.
7	Click on the Return Button after you have completed all your changes. Notice that any lines that you made changes will have the POA response field updated with the action that was taken.

[Acknowledge Purchase Orders](#)

Acknowledgement Details

Sample Vendor


The screenshot displays the 'Item Detail' section for a purchase order line. It includes fields for Line Number (1), Unit of Measure (Each), Item ID (0840680), and Description (Valve 1" Gate Brass 150# Threaded Usage General). There are buttons for 'Reset Item to PO values' and 'Reject Item'. Below this is a 'Schedules' table with columns for Order Sched, Sched, Order Due Date, Order Due Time, Order Acknowledge Quantity, Order Acknowledge Due Date, Acknowledge POA Quantity, Acknowledge POA Status, and Split Line. A 'Return' button is located below the screenshot.

Order Sched	Sched	Order Due Date	Order Due Time	Order Acknowledge Quantity	Order Acknowledge Due Date	Acknowledge POA Quantity	Acknowledge POA Status	Split Line
1	1	08/14/2006		12.0000	08/14/2006	12.0000		



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Step	Action
7	Click on the Save and Send Acknowledgement button to have this Purchase Order sent back to purchasing for review.
8	<p>You will then be taken to a save confirmation page where you click the 'OK' button and proceed to the next purchase order.</p> <p><u>Acknowledge Purchase Orders</u></p> <p>Save Confirmation</p> <p> The Save was successful.</p> <p>Acknowledgement will be submitted to buyer for review if purchase order needs to be changed.</p> <p><input type="button" value="OK"/></p>
9	This task is Complete – Repeat these steps for each purchase order that you wish to acknowledge.

[Acknowledge Purchase Orders](#)

Acknowledgement Summary

Sample Vendor

PO Number: 0000009293 **PO Date:** 07/26/2006
Acknowledgement Status: New **Acknowledge Date:**
POA Response: Accepted - Changes Made

PO Header Detail

Standard BU Comments

Click on the purchase order line number to see more details and to make any modifications.

POA Lines [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-2 of 2 | [Last](#)

Line	Item ID	Description	PO Qty	Acknowledge Quantity	UOM	POA Response
1	0840680	Valve 1" Gate Brass 150# Threaded Usage General	12.0000	10.0000	EA	Accepted - Changes Made
2	0670216	Coupling 1/4" Pipe Standard Black Usage General	24.0000	24.0000	EA	Accepted

Comments

[Return to Search Acknowledgement](#) [Send E-mail](#)



Vendor Package: Step 3: Acknowledge and Review Purchase Orders

C: Review Purchase Orders

Using the system you are able to review your purchase orders at any time. The following section will describe how you can reprint or research the status of your purchase orders.

Step	Action
1	Search for Purchase Orders to review Navigate to: Manage Orders > Purchase Orders
2	In the Search/Filter Acknowledgements page enter the desired search criteria and click on the ' Search ' Button.

Purchase Orders

Filter Options

Sample Vendor

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

From PO ID:	<input type="text"/>	<input type="checkbox"/> PO's Waiting Acknowledgement
To PO ID:	<input type="text"/> Main Content	
Item ID:	<input type="text"/>	
Vendor Item ID:	<input type="text"/>	
From Date:	<input type="text" value="06/26/2006"/> <input type="button" value="31"/> (example: 01/31/2000)	
To Date:	<input type="text" value="07/26/2006"/> <input type="button" value="31"/> (example: 01/31/2000)	
Buyer:	<input type="text"/>	
Contract ID:	<input type="text"/>	
	<input type="button" value="Search"/>	



Vendor Package: Step 3: Acknowledge and Review Purchase Orders

Step	Action
3	You will see a list of Purchase Orders that meet your search criteria.

Purchase Orders

Purchase Order List

Sample Vendor

[Set filter options](#) Default View for Change Orders:

Purchase Order List [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

[PO Details](#) [Header Details](#)

<u>Purchase Order</u>	<u>Status</u>	<u>Last Dispatched Date/Time</u>	<u>Lines</u>	<u>Total Amount</u>	<u>Acknowledge Status</u>
<input type="checkbox"/> 0000009293	Dispatched	07/26/2006 7:37:06AM	2	293.52 USD	Supplier Responded View PDF

[Select All](#) [Clear All](#)

[View Selected POs in Downloadable Format](#)

The View PDF button allows you to generate a printable version of the purchase order. Using the Default View for Change Orders options you can control if the report generated shows all lines or only the latest changes. (This same option is also used to control the online view of the PO.)

Click the [View PDF](#) button to print a new copy of the Purchase Order. You can view the results in the Report Manager by navigating to Reporting Tools > Report Manager

If you check the box next to each Purchase Order and Click the [View Selected POs in Downloadable Format](#) Button. The system will create a summary page of all the purchase orders selected. Clicking on the button will download the information into an Excel Spreadsheet.



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Click on a Purchase Order Number to view the Purchase Order Details.

If there are invoices associated to the purchase order they will display at the bottom of the page. Clicking on the invoices will take you to the details of the individual invoice.

[Purchase Orders](#)

Purchase Order Details

Sample Vendor

PO Number: 0000009293 **Purchase Order Date:** 07/26/2006
PO Status: Dispatched **Last Dispatch:** 07/26/06 7:37:06AM
Buyer: Nan Wolf
Billing Location: CORP ACCT
Payment Terms:

Purchase Order Total	
Merchandise Amt:	293.52
Freight/Tax/Misc.:	0.00
Total Amount:	293.52 USD

Standard BU Comments

Purchase Order Lines [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-2 of 2](#) | [Last](#)

Line	Status	Item ID	Description	Quantity	Amount
1	Active	0840680	Valve 1" Gate Brass 150# Threaded Usage General	12.0000 EA	282.00 USD
2	Active	0670216	Coupling 1/4" Pipe Standard Black Useage General	24.0000 EA	11.52 USD

Invoice List [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1 of 1](#) | [Last](#)

Invoice	Invoice Date	Amount	Due Date	Appr Stat	Voucher
		0.000			

No Invoices Found

[Return to Purchase Order List](#)

Step	Action
4	This task is complete.