ORACLE
PEOPLESOFT ENTERPRISE

PeopleSoft Enterprise eSupplier Connection 9.1 PeopleBook

November 2009

ORACLE

PeopleSoft Enterprise eSupplier Connection 9.1 PeopleBook
SKU fscm91pbr0

Contents

Chapter 3

Chapter 4

Appendix A

Delivered Workflows for PeopleSoft eSupplier Connection **107**

PeopleSoft eSupplier Connection Preface

This preface discusses:

* Oracle's PeopleSoft Enterprise products.

* PeopleSoft application fundamentals.

* Pages with deferred processing.

* Common elements used in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

Oracle's PeopleSoft Enterprise Products

This PeopleBook refers to these products:

* PeopleSoft Services Procurement

* PeopleSoft Purchasing

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise eSupplier Connection PeopleBook* provides you with implementation and processing information for your PeopleSoft eSupplier Connection system. However, additional, essential information describing the setup and design of your system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks.

These companion PeopleBooks contain information that applies specifically to PeopleSoft eSupplier Connection.

* *PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook*

* *PeopleSoft Enterprise Services Procurement 9.1 PeopleBook*

* *PeopleSoft Enterprise Managing Items 9.1 PeopleBook*

* *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*

Pages With Deferred Processing

Several pages in PeopleSoft eSupplier Connection operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Process Scheduler

PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.

- How to send PeopleSoft documentation comments and suggestions to Oracle.

- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.

- Understanding PeopleBook structure.

- Typographical conventions and visual cues used in PeopleBooks.

- ISO country codes and currency codes.

- PeopleBooks that are common across multiple applications.

- Common elements used in PeopleBooks.

- Navigating the PeopleBooks interface and searching the PeopleSoft online library.

- Displaying and printing screen shots and graphics in PeopleBooks.

- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.

- Understanding documentation integration and how to integrate customized documentation into the library.

- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

Common Elements Used in This PeopleBook

Business Unit	Enter an identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Effective Date	Enter the date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.
SetID	An identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define your organization's structure and processing options.
Statistic Amount	Converted cost using a standard unit of measure associated with a Statistic Code, for example, rental cost per square foot.
Wthd Hold	Indicates whether the payment is withheld due to missing information for a withholding vendor.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer Developer's Guide

Chapter 1

Getting Started with PeopleSoft eSupplier Connection

This chapter provides an overview of PeopleSoft eSupplier Connection and discusses PeopleSoft eSupplier Connection integrations and implementation.

PeopleSoft eSupplier Connection Overview

In today's business world, relationships between you and your suppliers are closer and more critical. Clear communication with suppliers about what you need and when you need it is a basic business requirement. PeopleSoft eSupplier Connection makes strategic information from back-end enterprise management systems available to suppliers, thus improving business collaboration, supplier response capability, and employee productivity. This internet-enabled collaboration enables buyers and sellers to work interactively, sharing the same view of data across the Internet. The benefits include faster and more accurate decisions, which result in improved customer service from suppliers, lower inventory in the supply chain, and total cost optimization.

Your suppliers can use PeopleSoft eSupplier Connection's self-service web applications to view and modify their own business information (company address, phone, and contact data) at their convenience. They can change or add office locations and change or add information about the individuals in their organization that handle your business relationship.

PeopleSoft eSupplier Connection also enables your suppliers to review schedule, invoice, payment, order, and receipt activity as well as view their account balances and the invoices related to those balances.

Suppliers can also provide you with transactional information, online and in realtime, by responding to request for quotes (RFQs), creating Purchase Order Acknowledgements and entering Advance Shipping Notices.

Before your suppliers can use the self-service transactions, they need access to the system. PeopleSoft self-service security for suppliers enables suppliers to give their own employees access to vendor self-service transactions, and frees your administrators from this task. At the same time, your employees retain the power to maintain vendor employees if necessary. Of course, you always control which suppliers have access to your PeopleSoft site, and which data they can view and change. You can also use PeopleSoft self-service security for suppliers to enable transaction access that matches the needs of different functional roles within the vendor organizations.

PeopleSoft eSupplier Connection is a supplier-based internet application that is both simple and easy to understand for the casual user. Suppliers need not be familiar or trained in using PeopleSoft software to use PeopleSoft eSupplier Connection.

PeopleSoft eSupplier Connection Integrations

PeopleSoft eSupplier Connection integrates with PeopleSoft Purchasing, PeopleSoft Payables, and PeopleSoft Supply Planning.

We discuss integration considerations in the implementation chapters in this PeopleBook.

PeopleSoft Purchasing and PeopleSoft eProcurement

PeopleSoft eSupplier Connection uses PeopleSoft Purchasing information for the purchase order, purchase order schedule, and receipt inquiries. This includes purchasing information created from integrations with PeopleSoft eProcurement or PeopleSoft Strategic Sourcing.

PeopleSoft Payables

Your suppliers can use PeopleSoft eSupplier Connection to retrieve information from PeopleSoft Payables about existing invoices, receipts, payments, and account balances using the review activity pages.

PeopleSoft Supply Planning

If you have PeopleSoft Supply Planning installed, suppliers can use the View Schedule transaction to view Planned Purchase Orders updates.

PeopleSoft eSupplier Connection Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for your organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook,* with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook, "PeopleSoft Enterprise Application Fundamentals PeopleBook Preface"

Enterprise PeopleTools PeopleBook: PeopleSoft Setup Manager

Chapter 2

Maintaining Vendor Information

This chapter provides an overview of vendor information maintenance, lists prerequisites, and discusses how to:

- Establish self-service security for vendors.

- Maintain users.

- Maintain vendor address information.

- Maintain vendor contact information.

- Configure supplier self-registration.

- Self-register suppliers.

- Send email messages.

Understanding Vendor Information Maintenance

PeopleSoft eSupplier Connection is a self-service web application that features employee-facing (internal) and supplier-facing (external) transactions that enable your suppliers to view and modify their own business information at their convenience.

Suppliers can add and update their own vendor addresses, email, and phone information in the system. They can also review, edit, and add contact information.

As soon as suppliers save their changes, your PeopleSoft database is updated.

Your suppliers can self-register, whether or not they are an existing vendor. You can set up standard roles and accessible pages for self-registered users, and track the logins and account usage for self-registered supplier users.

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Maintaining Vendor Information"

Prerequisites

Before suppliers can use PeopleSoft self-service transactions, they need access to the system. PeopleSoft self-service security enables vendor administrators to give their employees access to vendor self-service transactions.

You can also enable transaction access for different functional roles within the supplier organizations.

Establishing Self-Service Security for Vendors

You establish overall security for PeopleSoft eSupplier Connection just as you do for any other PeopleSoft application: by associating a permission list (which controls access to the system's web page components) with a role and associating the role with a user profile (user ID). Each user has one user profile but can be assigned multiple roles.

Note. Your PeopleSoft users are internal, while your vendors' users are external.

Self-Service Security Sample Data

PeopleSoft delivers sample permission lists, roles, and a user profile (SUPPLIER) as examples of how to set up vendor data and control self-service transactions. This example shows the sample roles that PeopleSoft provides for supplier-facing transactions:

Find an Existing Value | Add a New Value

Maximum number of rows to return (up to 300): 300
Search by: Role Name ∨ begins with su
☐ Case Sensitive

Search   Advanced Search

Search Results

View All	First ◀ 1-19 of 19 ▶ Last
Role Name	**Description**
SUPERVISOR	SUPERVISOR
Supervisor by Oprid Qry	Supervisor
Supplier Contract Agree Update	Sample - Supplier Cntrct Agree
Supplier Contract Clause Apprv	Sample - Supply Contract Apprv
Supplier Contract Hrdware Appr	Sample - Supplier Contrct Hrdw
Supplier Contract Interested	Sample - Supply Cntrct Intrest
Supplier Contract Librarian	Sample - Supplier Contract Lib
Supplier Contrct Administrator	Sample - Supply Contract Admin
Supplier-AR Specialist	Sample - A/R Specialist
Supplier-Account Manager	Sample - Account Manager
Supplier-Application Admin	Sample - Application Admin
Supplier-Customer Service Rep	Sample - Customer Service Rep
Supplier-Engineer	Sample - Engineer
Supplier-External Contracts	Supplier-External Contracts:
Supplier-External-User	Sample - Required Supp Role
Supplier-Guest	Sample - Supplier Guest role
Supplier-Production Manager	Sample - Production Manager
Supplier-Warehouse Personnel	Sample - Warehouse Personnel
Support App Admin	Support Application Admin

Example of provided roles

Note. All external supplier users must be assigned the Supplier - External User role (or one with similar permissions) to access the PeopleSoft system; it features PeopleTools-related permissions that control personalization and navigation access. In addition, if your installation includes the PeopleSoft Enterprise Portal, all external supplier users must also be assigned the PAPP_USER role (or one with similar permissions). The role contains the permissions that are necessary for homepage personalization and configurations.

To view the sample permission lists that are associated with the provided supplier roles:

1. Access the Roles component in PeopleTools Security.

2. Select a sample supplier role from the list on the Roles search page.

   The Permission Lists page in the Roles component displays the associated sample permission lists.

3. Click View Definition to access the Permission List component, where you can view the pages that are enabled by the selected permission list.

Internal Supplier Administrators

To set up security for external PeopleSoft eSupplier Connection users, at least one internal user, the supplier application administrator, must be assigned the PeopleSoft Supplier-Application Admin role. With this role, the administrator can create and update user IDs (except his or her own) to grant external vendor access to PeopleSoft eSupplier Connection. Vendors must first be assigned at least one vendor ID as part of user ID creation.

To set up external users, use the internal Vendor User pages (Vendors, Vendor Setup/Maintenance, and Vendor User).

External Supplier Administrators

To enable external users to administer security, the internal supplier application administrator must assign the Supplier-Application Admin role to at least one external user who belongs to each vendor ID.

External vendor administrators can:

•   Create and update users within the vendor ID to which they have access.

•   Grant self-service transaction access to the vendor IDs to which they have administrative access.

You can assign a variety of roles to the vendors' users. To enable an administrative user to create new users and grant new user roles, that user must have role grant capabilities, which you define on the Role Grant page within PeopleTools. This example illustrates how the page appears:
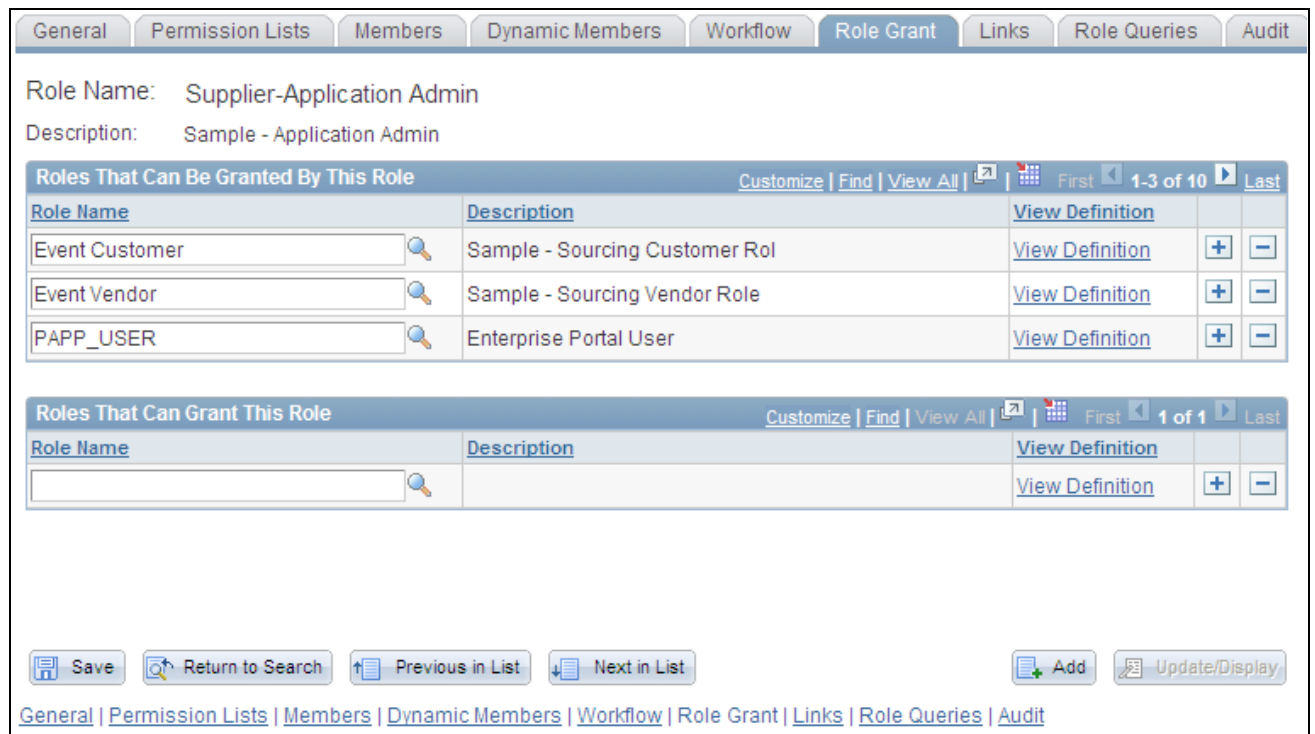
Role Grant page

User Maintenance Example

This diagram illustrates internal and external-based user maintenance flow where an internal system administrator controls the overall setup of supplier information, and external administrators setup external user within the supplier's organization:
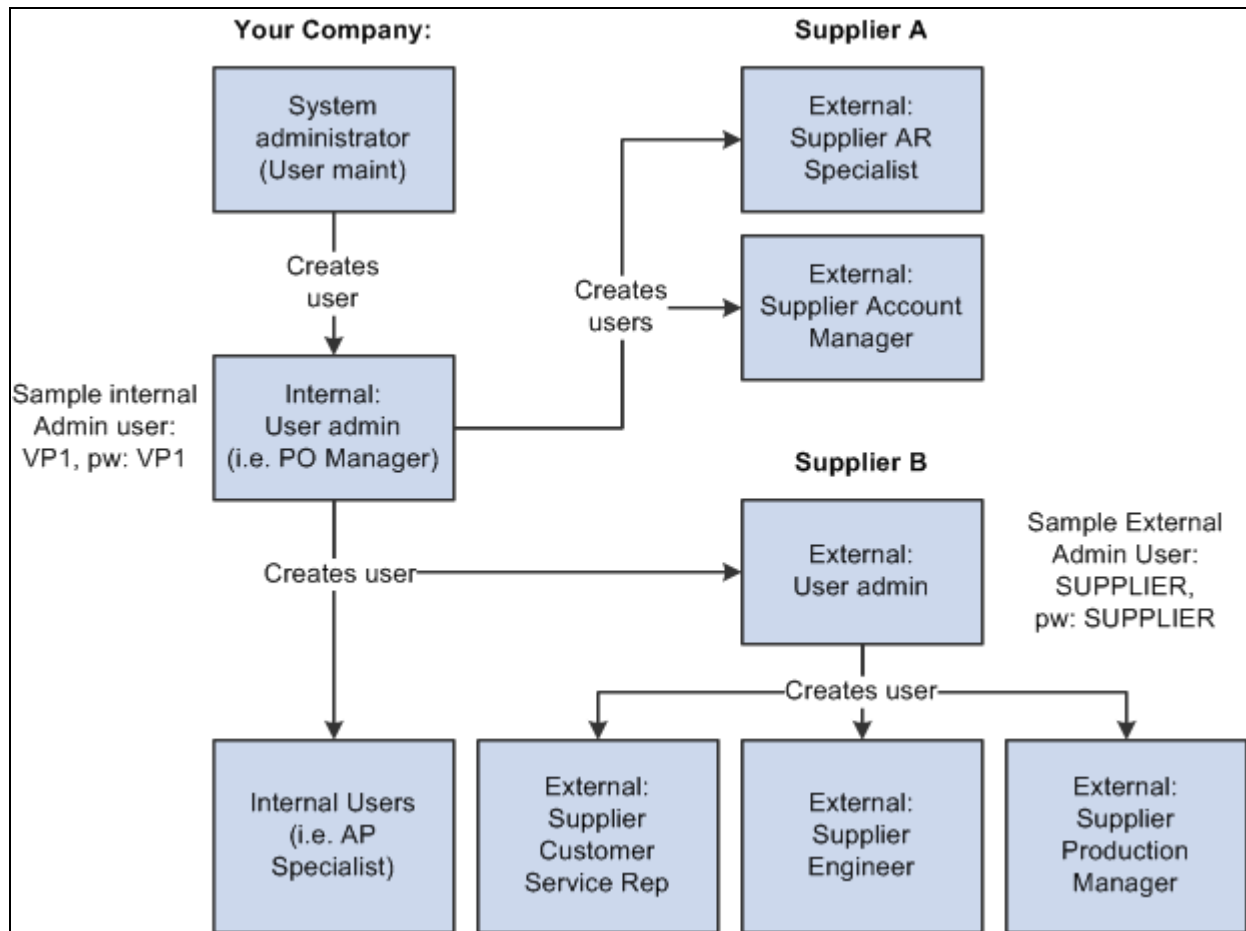
Internal and external user maintenance example

See Also

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Maintaining Vendor Information," Vendor Profiles

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools PeopleBook: Security Administration

Maintaining Users

To set up vendor users, use the Define Vendor User (UM_DISTR_INTVND) component.

Once your supplier application administrators define them, your suppliers' administrators can perform their own user maintenance.

This section discusses how to:

• Perform vendor user setup.

• Maintain external users.

Pages Used to Maintain Users

Page Name	Definition Name	Navigation	Usage
Vendor User Setup	UM_DISTR_VNDR_INT	Vendors, Vendor Information, Add/Update, Define Vendor User (internal)	Internal users with the Supplier Application Administrator role can create external administrators, give other internal users access to vendor IDs, and create or update vendors' users.
Security - Setup User	UM_DISTR_VNDR_EXT	Maintain Supplier Information, User Profiles (external)	External vendor administrators can create and maintain their own vendor users and give them access to vendor data.
Add Vendor	EXT_VND_SELECT	Click the Add A Supplier button on the Security - Setup User page.	Suppliers can add new vendors to be assigned to vendors' users.
Vendor User	VENDOR_USER	Vendors, Vendor Information, Add/Update, Vendor User	Associate users with vendors.

Performing Vendor User Setup

Access the Vendor User Setup page (Vendors, Vendor Information, Add/Update, Define Vendor User (internal).

Vendor User Setup page

To set up vendor users:

1. Enter logon information, completing these fields in particular:

Account Locked Out?	Select to disable this user's access to the PeopleSoft system.
Access Profile Symbolic ID	Each user ID has an encrypted access profile. Select a symbolic ID to use as a search key or intermediary between the user ID and the access ID. See *Enterprise PeopleTools PeopleBook: Security Administration*
Language Code	Select a base language for the user.
Rate Type	PeopleSoft MarketPay uses this field.

2. Assign roles to the user.

    Note. To set up security for external users, you must assign the PeopleSoft Supplier Application Administrator role to internal users. See Self Service Security for Vendors.

    See Chapter 2, "Maintaining Vendor Information," Establishing Self-Service Security for Vendors, page 4 .

3. Associate (existing) vendor IDs to the user.

    Each user ID can be associated with one or multiple vendor codes. This enables the user to view and, with the proper permissions, maintain data for the associated vendors. When the user logs in to PeopleSoft eSupplier Connection, the system determines to which vendor the user is associated. If the user is associated with multiple vendors, the Select Vendor page lists the vendors.

    See *Enterprise PeopleTools PeopleBook: Security Administration*

Maintaining External Users

Access the Security - Setup User page (Maintain Supplier Information, User Profiles (external)).

The values on this page duplicate the fields on the Vendor User Setup page, but they apply to external users only and are designed for the casual self-service user.

See Also

Chapter 2, "Maintaining Vendor Information," Establishing Self-Service Security for Vendors, page 4

Maintaining Vendor Address Information

This section lists the pages used to maintain vendor address information.

Pages Used to Maintain Vendor Address Information

Page Name	Definition Name	Navigation	Usage
Maintain Addresses - Select Vendor	PO_SS_VND_LIST	Maintain Supplier Information, Addresses	Suppliers select a vendor to navigate to its inquiry or maintenance pages. This page is available only if more than one vendor is associated with the user.
Maintain Addresses - Current Addresses	PO_SSVNDR_CURADDR	Maintain Supplier Information, Addresses Select a vendor on the Maintain Addresses - Select Vendor page.	Suppliers access pages to view, add, or maintain address, email, and phone information.
Maintain Addresses - Address Information	PO_SSVNDR_ADDRDTL	Click one of the following on the Maintain Addresses - Current Addresses page: • A Description link to view detailed address information. • The Edit button to access the page in Correction mode. • The Add a New Address button to access the page in Update mode.	Suppliers can view, add, or maintain address, email, and phone information. **Note.** The fields on this page vary according to the country that is selected.
Maintain Addresses - Future Address Information	PO_SSVNDR_ADDRFDTL	Click the Future Addresses link on the Maintain Addresses - Address Information page.	Suppliers can review addresses that are not yet in effect and add or edit future addresses. **Note.** The fields on this page vary according to the country that is selected.

Maintaining Vendor Contact Information

This section lists the pages used to maintain vendor contact information.

Pages Used to Maintain Vendor Contact Information

Page Name	Definition Name	Navigation	Usage
Maintain Contacts - Select Vendor	PO_SS_VND_LIST	Maintain Supplier Information, Contacts	Suppliers select a vendor to navigate to its inquiry or maintenance pages. This page is available only if more than one vendor is associated with the user.
Maintain Contacts - Current Contacts	PO_SSVNDR_CURCNTCT	Maintain Supplier Information, Contacts

Select a vendor on the Maintain Contacts - Select Vendor page. | Access pages to view, add, or maintain current contact information. |
| Maintain Contacts - Contact Information | PO_SSVNDR_CNTCTDTL | Click one of the following on the Maintain Contacts - Current Contact page:

• A Description link to view detailed address information.

• The Edit button to access the page in Correction mode.

• The Add a New Contact button to access the page in Update mode. | View, add, or maintain current contact information. |
| Maintain Contacts - Future Contacts | PO_SSVNDR_CNTFTDTL | Click the Future Contacts link on the Maintain Contacts - Contact Information page. | View, add, or edit contacts to go into effect on a future date. |

Configuring Supplier Self-Registration

This section describes how to:

• Set up supplier self-registration.

• Manage supplier users.

Understanding Supplier Self-Registration

If your company has large numbers of suppliers which you need to provide user accounts and provide external access to, having an administrator register many users is not efficient. You can set up the system to allow supplier users to create accounts individually by defining a registration code which can be sent manually to external users to create their own account. The supplier will need to know the registration code and their vendor ID to create a supplier user account. The registration code can be set up to expire base on a date to limit the time that an external user can create the account. In addition new component assists the internal administrator to monitor these supplier side accounts.

Note. To enable external suppliers to self register you must set up a URL and external web server that is configured for guest signon access.

It is recommended that you create a separate web server for the self-registration process than the web server you are using for standard supplier access. Also, please refer to the AUC_GUEST user profile as an example of the roles and permissions lists that you might want to use for the guest signon you set up.

Pages Used to Configure Supplier Self-Registration

Page Name	Definition Name	Navigation	Usage
Registration Setup	WV_REG_SETUP	Set Up Financials/Supply Chain, Common Definitions, Suppliers, Supplier Registration Setup	Configure the self-registration process for suppliers.
Supplier User Management	WV_USR_MGMT	Set Up Financials/Supply Chain, Common Definitions, Suppliers, Supplier User Management	Maintain supplier users and search for information on supplier usage and new accounts.

Setting Up Supplier Self-Registration

Access the Supplier Registration Setup page (Set Up Financials/Supply Chain, Common Definitions, Suppliers, Supplier Registration Setup).

Supplier Registration Setup

Define a code that will be used by Suppliers to self register. Suppliers will not be
able to self register without knowing this code.

*Registration Code: ACCA   ***Effective Until:** 08/03/2012

ID Number Verification: Tax Identification Number

Setup Default Supplier Profile

Select a UserId from the prompt below. This user's settings will be used as the default values when
creating a new Supplier user. (The roles and permissions assigned to this user will be used as default
roles for any subsequent users.)

*User ID: SUPPLIER   ***SetID:** BLG01

[View Associated Roles]

List of Roles   Customize | Find | View All | First ◄ 1-6 of 6 ► Last

Role Name	Description
EOPP_USER	Common Portal User
PAPP_USER	Enterprise Portal User
Supplier-Application Admin	Sample - Application Admin
Supplier-Customer Service Rep	Sample - Customer Service Rep
Supplier-External Contracts	Supplier-External Contracts:
Supplier-External-User	Sample - Required Supp Role

[View List of Pages Accessible]   ☐ Exclude PeopleTools Pages

List of Pages   Customize | Find | View 100 | First ◄ 1-10 of 393 ► Last

Portal Label

Connected Query Quick Start

Register Action Objective

Supplier Registration Setup page

Registration Code	Enter a code that the supplier must enter to create an account. You will need to send this code to suppliers when you invite them to register. Creating a list of proper emails you wish to send this code to is a manual process external to the PeopleSoft system. This email should include a URL for a web server with guest signon access as well as the registration code.
Effective Until	Enter the date until which the registration code will be effective. Once this date passes the suppliers can no longer create a user account.

ID Number Verification	Select the type of ID number, such as a tax ID or DUNS number, that you want to use as additional security to track and verify transactions for vendors. The ID number verification provides security during the supplier registration process where external users are enabled to create a user when they have a vendor defined in your system. When you enter an ID in this field, the system requires the external user to enter the specific ID for the user's vendor (not location) level as part of creating a new supplier user account.
	The system stores identification numbers for vendors at the vendor and vendor-location levels, but only uses IDs at the vendor level for validation. Requiring identification numbers is optional, and you can only use one number per vendor.
User ID	Enter a sample user ID that determines the roles and security available for any self-registered users when they create an account. Any role that is defined for that user ID will get assigned to any supplier that self registers. This User ID should contain the minimum access to supplier side components you wish to enable as the roles tied to this user are copies to the new user that is created.
Default SetID	Enter the SetID used for your vendor table. The system uses this to verify the vendor ID when users self-register.
View Associated Roles	Click to display the list of roles associated with the sample user ID. These are the roles that all self-registered users will have at the time the user is created.
View List of Pages Accessible	Click to display a list of pages accessible to the sample user ID. These are the pages to which all self-registered users will have access.
Exclude PeopleTools Pages	Select to exclude PeopleTools pages from the list of pages that suppliers can access, showing only the functional pages

Managing Supplier Users

Access the Supplier User Management page (Set Up Financials/Supply Chain, Common Definitions, Suppliers, Supplier User Management).

Reopen Closed Reqs

 This page is designed for the internal administrator to monitor external supplier users of the system.

You can use multiple search methods to narrow the supplier users search results. For example, you can enter a vendor ID and then search on how many user accounts have been created for that vendor in a given date range, or show the last login date for all the users at a given vendor.

Search Criteria

User ID, SetID, and **Vendor ID**	Select to filter search results.
Component	Select to filter search results by components users have access to.
Role Name	Select to filter search results by roles associated with users.

Account Create Date

From Date and **To Date**   Enter a date range and click Search. The system returns the names of the users that have created accounts within the date range.

Last Login Date

From Date and **To Date**   Enter a date range and click Search. The system returns the names of the users that have logged in within the date range.

Include Deactivated   Select to include deactivated accounts in the search.
Accounts

Supplier Users

Deactivate Selected   Click to deactivate the user's accounts that you have selected after searching.
Users

Activate Selected Users   Click to activate the user's accounts that you have selected after searching.

Self-Registering Suppliers

This section provides an overview of supplier self-registration and discusses how suppliers can:

• Sign on to the system.

• Register as a supplier.

Understanding Supplier Self-Registration

To use PeopleSoft eSupplier Connection, a supplier user needs to:

1. Receive a code from their supplier administrator.

2. Access the self-registration pages on PeopleSoft eSupplier Connection.

3. Enter the self registration information, including a valid code and vendor ID.
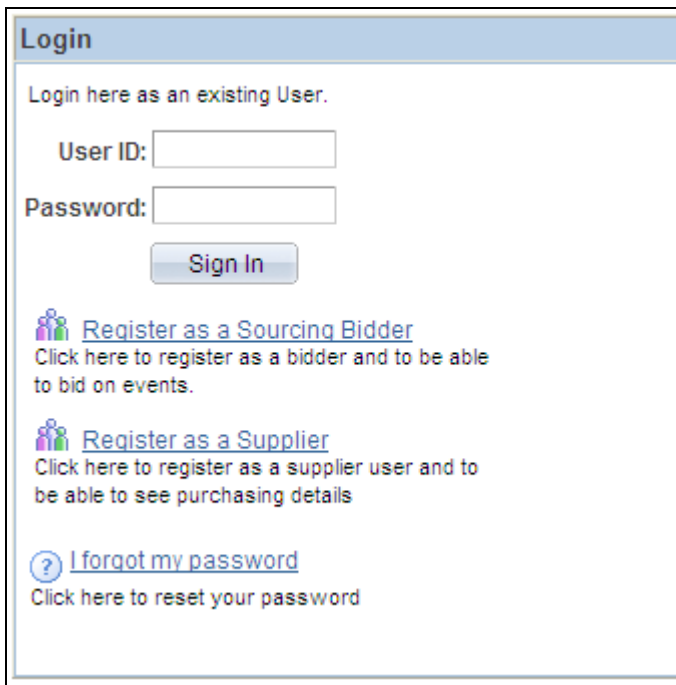
Pages Used to Self-Register Suppliers

Page Name	Definition Name	Navigation	Usage
Login pagelet (external)	AUC_LOGIN_PGLT	Opens on login.	Login to PeopleSoft eSupplier Connection or create an account. **Important!** This pagelet needs to be configured for the homepage by the administrator, who must also configure the web server URL to bypass signon setup. To enable a supplier user to create their own account it is necessary to use a webserver with bypass signon because prior to creating an account, the URL logs them on as a guest to access the self registration pagelet the first time.
Supplier Registration (external)	WV_REGISTER	Click the Register as a Supplier link on the Login pagelet.	Register as a supplier and create an account.

Signing On to the System

Access the Login pagelet (opens on login).

Note. This pagelet is accessible from a URL on the email you send to suppliers to self-register. Suppliers use the ID *AUC_GUEST* and password *AUC_GUEST* to sign on to the system and then access the Login pagelet to register as a supplier.

Login pagelet

Register as a Supplier   Click to access the Supplier Registration page and self-register as a supplier.

Registering as a Supplier

Access the Supplier Registration page (click the Register as a Supplier link on the Login pagelet).

Supplier Registration

Fill in the following information and click on the Create button to create a Supplier account.
In order to self register you must have received a predefined code and know your
corresponding vendor id.

Code: [   ]

*User ID: [   ]   Description: [   ]

*Email ID: [   ]

Password: [   ]

Confirm: [   ]

Language: English   Currency: [   ]

Vendor List   Customize | Find | View All | | First 1 of 1   Last

Vendor ID	ID Number		
[ ]	[ ]	+	−

Create

Supplier Registration page

Code	Enter the supplier registration code. This code is required for registration.
	Note. The buyer sets up this code on the Registration Setup page, and provides it to the supplier.
	See Chapter 2, "Maintaining Vendor Information," Setting Up Supplier Self-Registration, page 13.
Vendor ID	Enter a valid vendor ID. This is required for registration.
	Note. The buyer provides this code to the supplier if needed.

ID Number	Enter a vendor ID number. The registration setup enables suppliers to self register. As part of the setup process, the ID number verification provides an additional security measure during the registration. The system uses the ID number in addition to the vendor ID to track and verify transactions for a supplier. If the ID number field has been specified on the internal Registration Setup page, the system validates that the number the vendor enters matches the number specified for that vendor.

If the number you enter does not match the ID number, the system displays an error message and does not allow the creation of the vendor user.

Note. The message content includes the type of ID number that was entered for the vendor's verification.

The system stores identification numbers for vendors at the vendor and vendor-location levels, but only uses ID numbers at the vendor level for validation. Identification numbers are optional, and you can only use one number per vendor. If an ID number has not been defined for a vendor, the ID Number field is not available or required.

Sending Email Messages

The Email Message page is accessible from several supplier- and employee-facing pages. Users can send an email that contains a link to the page from which the Email Message page was accessed.

The body of the message contains two URLs: one that an internal recipient uses to access the referenced page through the PeopleSoft Enterprise Portal, and one that an external recipient uses to access the page through an external portal (in this case, the supplier portal registry). Even though the recipients get a URL, they need the correct privileges to access the system.

Note. This email messaging is not intended to be the facility for sending out self registration emails, which should be done manually.

For example, a supplier who sends email notification from one of the pages in the ASN History component would use this version of the Email Message page:

Email Message

TO:	peoplesoft@peoplesoft.com

CC:

BCC:

Email Subject: Advanced Shipment Notification for ERNIE'S BIKE SHOP

Message:
Advanced Shipment Notification Links:

Employee Portal -
http://rtdc78003qaemt.us.oracle.com:7001/psp/e910r71ant/EMPLOYEE/ERP/c/MANAGE
_SHIPMENTS.PO_SS_ASN_HISTORY.GBL?
Action=U&Page=PO_SSASN_HIST_SRCH&eipctlid=&VendorSetid=SHARE&VendorId=
SCM0000004&VndrLoc=&ShipDate=&ToDate=2009-10-
01&PoId=&InvItemId=&ShipmentNumber=&OrderNo=&AsnSeqNbr=0&TargetPage=HD
R

OK   Cancel

Email Message page example

Chapter 3

Maintaining RFQ Responses

This chapter provides an overview of the eRFQ feature, lists common elements, and discusses how to:

*   Alert vendors about dispatched requests for quotes (RFQs).

*   Review and respond to RFQs.

Understanding the eRFQ Feature

Complex quoting and contracting procurement processes require extensive communication, collaboration, and negotiation between buying and selling organizations, and are critical to establishing long-term partnerships with trusted suppliers. In today's environment, traditional applications do not facilitate realtime communications and collaboration between trading partners. In PeopleSoft eSupplier Connection, the eRFQ feature enables your suppliers to use an internet browser to review and respond to RFQs that are generated in PeopleSoft Purchasing.

eRFQ Process Flow

The buyer:

1. Creates and dispatches the RFQ in PeopleSoft Purchasing.

    Before a supplier can view and respond to an RFQ in PeopleSoft eSupplier Connection, you must create it, use the Dispatch Vendor List or the Item Supply Vendor List to assign the RFQ to the vendor, and dispatch it to the vendor. When dispatching by email, the email includes a link which returns the supplier back to the RFQ to respond.

2. Alerts the vendor to the RFQ.

    You can set up automatic workflow notification if your installation includes PeopleSoft Enterprise Portal, or you can generate an email that contains a URL to send the supplier directly to the RFQ details as part of the dispatch process.

The supplier:

1. Accesses the RFQ in PeopleSoft eSupplier Connection.

    If the supplier accesses the RFQ component using the portal menu, the Request for Quote List page displays the RFQs that meet the search criteria. The supplier can also access the component using the RFQ pagelet.

2. Reviews new RFQs and submits responses.

   The supplier can review requested items and submit responses by item regarding information such as quantity, price, date, and lead time.

   When the supplier submits a response, the system captures and date- and time-stamps the current RFQ details and the supplier's response. This enables the buyer to review supplier responses even if the RFQ or response information subsequently changes The RFQ response status also changes in PeopleSoft eSupplier Connection to *Responded,* and now you can view or maintain the RFQ response in PeopleSoft Purchasing.

   Note. The buyer can view or maintain the RFQ or RFQ responses after the RFQ is dispatched; the buyer does not need to await supplier response to access it through PeopleSoft Purchasing.

RFQ Response Modification

The buyer can propose a change to the quote by reopening the RFQ line (by deselecting the Responded check box) and directly changing the price, quantity, due date, or other fields on the RFQ Response (request for quote response) page in PeopleSoft Purchasing.

Upon saving the changes, the system changes the RFQ status back to *New* (as seen by the vendor), and now the vendor can enter a new response to the RFQ.

Note. The system does not capture buyer changes to RFQ responses in the RFQ history.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Understanding Requisitions"

Common Elements Used in This Chapter

Item ID and **Vendor Item ID**	These are the vendor item identifiers, if defined for the selected vendor-item combination on the Purchasing Attributes - Item Vendor page. If no vendor-item information exists, then your item ID appears.

Alerting Vendors About Dispatched RFQs

You can alert suppliers by email (or, if your installation includes PeopleSoft Enterprise Portal, by a task list entry using the Integrated Task List pagelet) that you have dispatched a new RFQ to them.

This section discusses how to:

• Automatically email RFQ alerts.

• Send workflow task list alerts.

Automatically Emailing RFQ Alerts

To set up automatic RFQ dispatch alert emails to your suppliers:

1. Ensure that the supplier contact is specified on the RFQ and that the contact's email address is specified on the Vendor Information - Contacts page.

   If you do not specify the contact on the RFQ, or if the contact email address is missing, the system sends an email to the supplier's email address that you specify on the Vendor Information - Address page.

2. Run the RFQ Print/Dispatch SQR process (PORFQ01) and the Email Application Engine process (PO_RFQ_EMAIL) in PeopleSoft Purchasing.

   Note. Because you must run the RFQ Print/Dispatch process before sending an alert with the Email process, run RFQDISP job, which runs both processes sequentially.

   An email that is sent to a supplier regarding a dispatched RFQ contains a link that points to the Request For Quote List page (bypassing the search page) so that your supplier can view the RFQ. The email can also include the RFQ as an attachment.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Understanding Requisitions"

Sending Workflow Task List Alerts

While the task list processes function independently of PeopleSoft self-service applications and dispatch-based alerts, you can optionally use workflow to add a task item to the Integrated Task List pagelet if:

1. You are using PeopleSoft Workflow and:

   a. You have set up the PO_RFQ_DISPATCH business process.

   b. Workflow activity is *Active.*

2. Your installation includes PeopleSoft Enterprise Portal.

When the supplier selects a task item, the Request for Quote List page opens, displaying the quote. The system marks the task item as *worked,* and it no longer appears on the Integrated Task List pagelet.

Note. If you give vendors the appropriate privileges, they can access task list entries or worklists through PeopleTools.

Enabling Users to See Task List Items for Specific Vendors

To view task list entries for demonstration purposes, the workflow activity (PO_RFQ_DISPATCH) is set up to use the Supplier-Customer Service Rep role. In addition, this role routes the control profiles that include the required route control types or the role that you define within the PO_RFQ_DISPATCH business process workflow activity.

Use two route control profiles:

1. Supplier includes three route control types:

    a. Vendor.

    b. Vendor_Loc (vendor location).

    c. TableSet ID.

2. Admin Area PO includes Administrative Area.

Before a task list item appears on the Integrated Task List pagelet, the PO_RFQ_DISPATCH workflow activity validates that ROLENAME = Supplier-Customer Service Rep (or role that you defined and assign to the activity). It also validates that these route control type values (for the route control profile for the user) match these values:

- Administrative Area = PO.

- TableSet ID = VENDOR_SETID.

- Vendor = VENDOR_ID.

- Vendor_Loc = VNDR_LOC of RFQ.

See Appendix A, "Delivered Workflows for PeopleSoft eSupplier Connection," page 107.

Note. The SetID, vendor, and vendor location are defined on the RFQ.

If all of these conditions are met, the system creates a task list item for the user. Depending on the setup, a task list item for the same RFQ-supplier-item combination might appear in multiple user task lists.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools PeopleBook: Security Administration

Reviewing and Responding to RFQs

This section discusses how to:

- Search for RFQs.

- Review RFQ lists.

- View RFQ details.

- Respond to RFQs.

- Review RFQ response history.

Pages Used to Review and Respond to RFQs

Page Name	Definition Name	Navigation	Usage
Request for Quotes - Select Vendor	PO_SS_VND_LIST	Process Quotes, Respond to Quote	Suppliers select a vendor to navigate to its RFQ inquiry pages. This page is available only if more than one vendor is associated with the user.
Request for Quotes - Filter Options	PO_SSSRCH_RFQ	Process Quotes, Respond to Quote Click the Show all/Enhanced link on the Recently Dispatched RFQs pagelet.	Search for specific RFQs. This is the initial search page that the supplier sees when associated with only one vendor.
Request for Quotes - Request for Quote List	PO_SSRFQ_RESP_LINE	• Click the Search button on the Request for Quotes - Filter Options page. • Click an RFQ ID link on the Recently Dispatched RFQs pagelet.	View general RFQ information and a list of items by RFQ to which to respond.
Request for Quotes - Request for Quote Detail	PO_SSRFQ_LN	Select an RFQ ID on the Request for Quotes - Request for Quote List page.	Review RFQ details for a specific item.
Billing Address	PO_SSSEC_BILL_ADDR	Select a billing location on the Request For Quote Detail page.	View billing address and telephone details.
Shipping Address	PO_SSSEC_SHIP_ADDR	Select a ship to location on the Request For Quote Detail page.	View shipping address and telephone details.
Request For Quote Response	PO_SSRFQ_RESP	Click the New or Responded button on the Requests For Quote List page.	View or respond to RFQs. This is the primary page that a supplier uses to respond to a specific RFQ item.

Page Name	Definition Name	Navigation	Usage
Email Message	WV_PE_EMAIL_SP	Click the Send Email link on the Request For Quote Response page.	Send an email to someone regarding the quote. This email includes links that can take a supplier to the Request for Quote List page or take you (an internal PeopleSoft user) to the PeopleSoft Purchasing Request For Quotes page or the RFQ Response page.
Request for Quote History	PO_SSRFQ_RESPONSE	The supplier clicks the View History link on the Request for Quote Response page; the buyer clicks the Supplier History button on the RFQ Response page	View original RFQ details and supplier responses.

Searching for RFQs

Access the Request for Quotes - Filter Options page (Process Quotes, Respond to Quote, and click the Show all/Enhanced link on the Recently Dispatched RFQs pagelet).

Note. Your suppliers can review only those RFQs for which they have security. Also, the system retrieves only dispatched RFQs with a status of *Approved* or *Closed;* it ignores RFQs with *Open, On Hold,* and *Canceled* statuses.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Managing Requests for Quotes," Dispatching RFQs.

The supplier selects the criteria with which to filter the search. In particular:

View Current Quotes   The system retrieves RFQs based on whether the supplier selects this or View Closed Quotes and on which values the supplier selects in the Include Quotes field.

If the supplier selects this option and the New (Dispatched) field, the system displays all of the approved open RFQs (whose bidding dates haven't passed) to which this supplier has not responded.

If the supplier also selects Responded, then the system displays all of the approved open RFQs to which this supplier has responded.

If the supplier also selects New (Dispatched) and Responded, then the system displays all of the approved open RFQs that are assigned to the supplier.

View Closed Quotes   If the supplier selects this option and New (Dispatched), then the system displays closed RFQs to which the supplier has not responded.

If the supplier also selects Responded, the system displays all of the closed RFQs to which this supplier has responded.

If the supplier also selects New (Dispatched) and Responded, the system displays all of the closed RFQs.

Search   Click to initiate the search and view the results on the Request for Quotes - Request for Quote List page.

Reviewing RFQ Lists

Access the Request for Quotes - Request for Quote List page (click the Search button on the Request for Quotes - Filter Options page).

The system displays any RFQs that are associated with the vendor.

RFQ ID   Click an RFQ ID to access the Request For Quote Detail page.

Respond   This button label changes depending on the RFQ status *(New* or *Responded).* After the supplier submits a response per RFQ item, the label changes to Responded, and the response is visible on the buyer side.

Viewing RFQ Details

Access the Request for Quotes - Request for Quote Detail page (select an RFQ ID on the Request for Quotes - Request for Quote List page).

The system displays RFQ details.

Billing Location   Click to view specific billing address and phone information.

Ship To Location   Click to view specific shipping location and phone information.

Comments and Attachments   If you want your suppliers to see any comment or attachments, you must specify that they can view them as you enter them on the RFQ. You make this specification on the RFQ Header and Line Comments page (select the Send to Vendor check box) in the Requests for Quotes component in PeopleSoft Purchasing.

Responding to RFQs

Access the Request For Quotes - Request For Quote Response page (click the New or Responded button on the Requests For Quote List page).

Request For Quotes

Request For Quote Response

CAMPER'S WAREHOUSE

RFQ ID:	0000000004	Line Number:	1
Request Date:	08/04/2000	RFQ Reference:	
Date Time Responded:	08/04/2000 4:05PM		
Date RFQ Opened:	08/04/2000 4:02PM	Date RFQ Closed:	
Buyer:			
Contact:			
Salesperson:			
Vendor Ref:		Billing Location:	USA - New York
Payment Terms ID:	30 Net 30		

Item ID:	10071	Vendor Item ID:	
Description:	Compact Binoculars, 10x25		
Quantity:	500.0000	Unit of Measure:	EA Each
Price:	38.50000	Currency Code:	USD Dollar
Minimum Quantity:			

Request for Quote Response page (1 of 2)

Request for Quote Response page (2 of 2)

The status of the RFQ response (by item) determines the mode of this page:

*   When the supplier accesses this page by clicking New on the Request for Quote List page, several supplier response fields are available for modification, including Quantity, Price, and Schedule Date.

    The New button appears when an RFQ item requires a response from the buyer.

*   When the supplier clicks the Responded button, this page is display-only.

    The Responded button appears when this supplier has previously entered a response for the RFQ item.

Submitting RFQ Responses

To respond to an RFQ:

1. On the Request for Quote List page, click the New button for the RFQ ID to which you want to respond to access the Request for Quote Response page.

    Note. An RFQ's *New* status can be the result of the buyer reopening the line for further response; it does not necessarily indicate that this is the first time that the supplier has received or responded to the RFQ. See Reviewing RFQ Response History.

2. Many of the following field values appear by default from the actual RFQ.

   In addition to the fields to which suppliers would most commonly respond (such as Price, Quantity,Unit of Measure,Lead Time Days, and Schedule Date), they can also respond to related fields, including:

Salesperson	The supplier's employee who is responsible for your purchase.
Date Time Responded	The date and time that the supplier submitted a response for this item. The system maintains this field.
Vendor Item ID	Suppliers can use this field to notify buyers of new or changed vendor item IDs.
	Note. This does not automatically update the Vendor Item ID table in the PeopleSoft system.
Description	Notifies the buyer of the supplier's item description.
Minimum Quantity	The minimum quantity that the supplier is willing to quote.

   Note. Supplier responses are made on an item-by-item basis. However, several editable fields on the Request for Quote Response page include header values and vendor comments. When the supplier changes these values during an RFQ item response, the system stores them at the header level of the RFQ response. Thus any changes of the most recent item response are present on the buyer side. The response history displays any changes to these values as they occur response by response.

3. After entering any changes or comments, submit the response.

Submit	Click to submit the response so that it can be viewed on the internal RFQ pages in PeopleSoft Purchasing. After clicking Submit, if the supplier chooses to continue, he or she can no longer edit the RFQ response but can still view it in read-only mode. Upon submission, the system stores supplier response history for the RFQ item to which the supplier is responding.
Send Email	Click to open the Email Messages page and send an email to an internal or external party about the quote.
	See Chapter 2, "Maintaining Vendor Information," Sending Email Messages, page 21.

Reviewing RFQ Response History

Access the Request for Quote History page (suppliers click the View History link on the Request for Quote Response page; buyers click the Supplier History button on the RFQ Response page).

To view RFQ response history, the supplier clicks View History on the Request for Quote Response page; the buyer clicks the Supplier History button on the RFQ Response page.

The Request for Quote History page displays RFQ header details, the line details from the original RFQ at the time that the response was made, and the vendor's response. (There can be multiple vendor responses for the same RFQ line.)

Buyer's Comments	Displays the comments that the buyer entered on the RFQ Header Comments page when submitting the original RFQ.
Vendor's Header Comments	The vendor can enter multiple comments on the Request for Quote Response page (for each time the vendor responds to an RFQ). The system stores these comments at the header level, not the item level, of the RFQ.
Return to Current Response	The buyer clicks this link to return to the RFQ Response page in PeopleSoft Purchasing; the supplier clicks it to return to the Request for Quote Response page in PeopleSoft eSupplier Connection.

Note. You can also view a single RFQ response using the Response By Vendor inquiry page in PeopleSoft Purchasing.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Understanding Requisitions"

Chapter 4

Acknowledging Purchase Orders Online

This chapter provides an overview of online purchase order acknowledgements (POAs) and discusses how to:

- Create online POAs (suppliers).

- Review and approve online POAs (buyers).

- Respond on behalf of the supplier (buyers).

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Creating Purchase Orders Online," Using Purchase Order Acknowledgements

Understanding Online POAs

PeopleSoft eSupplier Connection enables your suppliers to enter POAs directly into the system, bypassing the need to perform the transaction using an electronic data exchange (EDX) method. This online POA feature enables buyers and suppliers to collaborate on any acknowledgement issues in realtime and capture the supplier response history and purchase order details at the time acknowledgements are made.

The online POA business process follows these general steps:

1. (Optional) The buyer establishes POA settings.

   POA alert criteria and POA tolerance settings are defined by the buyer for the purchasing business unit using the POA Settings page in the Processing Options component or for a vendor location using the Procurement Options page in the Vendor component. When the system retrieves the settings, it first looks in the vendor location and only if not specifically defined there does it use the general purchasing business unit settings.

2. The purchase order is dispatched to the vendor.

   When PeopleSoft eSupplier Connection is installed and the email dispatch method is used, an URL is provided to bring your suppliers back into your supplier portal and to the specific POA. This is done for initial dispatching of purchase orders as well as change order dispatches. When a change order is dispatched, the email indicates that the order is a change order including the change order number. Within the POA, the latest changes associated to the change order number are shown to the supplier for review and acknowledgement.

3. The supplier creates an online acknowledgement using the Purchase Order Acknowledgement component, and can:

   a. Accept or reject the purchase order in its entirety, or at the line item level.

   b. Suggest changes to prices, quantities, shipping methods, or delivery dates.

   c. Indicate backorder schedules and suggest splitting schedule lines if required.

   d. Save a POA in progress for later submission.

   e. Submit the POA for buyer approval.

      Note. If there are no changes to the POA or if there are changes made to a POA but they do not exceed the POA tolerance settings defined, the status is automatically set to *Buyer Accepted* since there is either nothing for the buyer to approve or the buyer wishes to have the system automatically approve changes that are within the tolerance settings defined for the supplier.

      Note. A workflow option is included which sends notification to the buyer when a supplier creates a POA specifying changes. To enable this workflow, activate the event Buyer Notify within activity PO_ACKNOWLEGEMENT; this adds worklist entries for the buyer user associated to the purchase order that link to the buyer side PO Acknowledgement page.

      See Appendix A, "Delivered Workflows for PeopleSoft eSupplier Connection," page 107.

   f. Send an ad hoc email to the buyer or other external users containing a link to access the POA directly (the recipient must have proper security to the page).

   g. Collaborate on any further issues with the buyer.

      For example, if the buyer is not satisfied with the vendor response, they can enter comments and reset the status back to *Supplier Review* so that they can continue to collaborate until the issues are resolved.

4. The buyer uses the Acknowledge Purchase Orders component in PeopleSoft Purchasing to view supplier-entered POAs, and can:

    a. Review the changes suggested by the supplier.

    b. Acknowledge on behalf of the supplier. For example, the supplier called them with changes and the buyer wants to log them as acknowledgements.

    c. Approve a POA and if desired, submit the PO Auto Change Order process immediately.

        The PO Auto Change Order Application Engine process (PO_AUTO_CHNG) is a process that runs the Load Change Request process and the Process Change Orders process sequentially. If you want to run those processes individually you still can.

        The POA can be changed at any time before the Load Change Request process is run. Once the process runs, the POA is not editable. Approved POAs feed suggested changes such as quantity, price, and schedule date into the Change Request Load tables, which when approved update the original purchase order.

        Note. You can set up automatic approval for online POA change requests on the Purchasing Definitions - Business Unit Options page. Once approved using the Purchase Order Acknowledgement pages, the changes won't need to be approved again between the Load Change Request and Process Change Orders processes. You must have this set up to automatically approve online POA change requests if you wish to submit the PO Auto Change process directly from the Maintain Purchase Order pages.

    d. Return the POA with changes for supplier review.

    e. Send an ad hoc email to the supplier or other internal users containing a link to access the POA directly.

Additional Processing Actions

You can perform an additional process to assist buyers when purchase orders have not been acknowledged by the supplier.

To notify buyers that POAs have not been received, the buyer runs the POA Alerts Application Engine process (POA_ALERTS) optionally.

If the buyer specifies alert criteria for the purchasing business unit using the POA Settings page in the Processing Options component or for a vendor location using the Procurement Options page in the Vendor component, this process will create worklist entries for the buyer specifying which purchase orders have not been acknowledged by the supplier with a POA.

POA Status

POA status is defined at several levels in PeopleSoft eSupplier Connection.

Note. POAs that are submitted to PeopleSoft Purchasing from EDX use a status structure (header, line, and schedule) that refers to the action taken in the POA rather than the collaboration status the POA is in between the buyer and vendor. EDX POAs use a similar approval flow as those submitted online.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Purchase Orders Online," Reviewing Acknowledgement Header Information.

Acknowledgement Status

The stage of the dispatched purchase order, and its subsequent acknowledgement by the supplier, applies to the entire POA and determines the following:

New	The purchase order has not been acknowledged, or has been redispatched because of a change order and requires new acknowledgement.
Supplier Review	The supplier is working on the POA, which cannot be viewed or edited by anyone else at this stage.
Supplier Responded	The supplier has saved and submitted the POA with changes, which can now be viewed by the supplier, or edited by the buyer.
Buyer Accepted	Both buyer and supplier can only view the POA, which is ready to be processed by Change Request Load process if it includes changes. This is also the default status when a supplier submits the POA without any changes.

This status appears on the:

- Search/Filter Options pages.

- Header section of the Acknowledgement Details pages.

- Recently Dispatched POs pagelet.

Header POA Response

The action the supplier has taken; applies to the entire POA and indicates to the buyer the following:

Accepted	The supplier has accepted entire purchase order without changes. This is the default response status for new POAs.
Reject With Detail	The supplier has rejected the entire purchase order. All editable fields on the Acknowledgement Details page are reset to the current purchase order values and the quantity is reset to zero. If approved by the buyer this will cancel the entire purchase order.
Accepted - Changes Made	The supplier has made changes to the purchase order. This may include changes to line items or schedules, and rejected lines.

This POA response status appears on the Header section of the Acknowledgement Details pages.

Line POA Response

Indicates the following:

Accepted	The supplier has accepted the line item without changes. This is the default response status for new POAs.
Reject with Detail	The supplier has rejected the entire line item. The editable fields for the line and schedules are reset to the current purchase order values and the quantity is reset to zero. If approved by the buyer, this cancels the purchase order line.
Accepted - Changes Made	The supplier has made changes at the line item or schedule level.

Schedule POA Status

The action the supplier has taken; applies to the selected schedule, and indicates the following:

New	The schedule is added when supplier splits a row.
Canceled	Caused when a line is rejected or by changing the schedule quantity to zero.
Changed	Any changes to the schedule fields (due date, quantity, shipping method, and price).

POA Status Example

This table shows the different statuses that occur when a POA is required and change order acknowledgements are required during the processing of a POA.

Action	*PO Status*	*POA Status on PO*	*POA Status in Acknowledgment*	*POA Required (on purchase order)*
Initial purchase order is created.	Open, Approved, or Pending Approval	Awaiting Dispatch (WD)	Won't see in POA at this time.	Y
Purchase order is dispatched.	Dispatched	Awaiting POA (WR) **Note.** Dispatch process moves the status because it was awaiting dispatch.	New	Y
Supplier responds with changes.	Dispatched	Responded, Awaits Review (SR)	Supplier Responded (SRP)	Y
Buyer accepts POA.	Dispatched	Approved, Changes Pending (BA)	Buyer Accepted (BAC)	Y
Change order is processed.	Open or Approved	Acknowledged, with Changes (AC)	Can only see in history mode.	N

Action	PO Status	POA Status on PO	POA Status in Acknowledgment	POA Required (on purchase order)
Purchase order is redispatched.	Dispatched	Acknowledged, with Changes (AC) **Note.** Dispatch won't change status because not awaiting dispatch.	New (change order 1) **Note.** POA not required for this one, because this is actually the change order reflecting the changes that the supplier made above.	N
Buyer makes more changes to the purchase order.	Open or Approved	Awaiting PO Dispatch (WD)	Won't see in POA because purchase order is not dispatched.	Y
Purchase order is dispatched again.	Dispatched	Awaiting POA (WR)	New (change order 2) **Note.** POA required now, because it contains changes that are new to the supplier (that didn't come from the last round).	Y
Supplier responds with no changes	Dispatched	Acknowledged (AK)	Buyer Accepted (BAC)	N

Creating Online POAs (Suppliers)

Suppliers can enter POAs directly into the PeopleSoft system.

This section discusses how the suppliers:

*   Search for POAs.

*   Create online POAs.

*   View and change acknowledgement details.

Pages Used to Create Online POAs

Page Name	Definition Name	Navigation	Usage
Acknowledge Purchase Orders - Select Vendor	WV_SS_VND_LIST	Manage Orders, Acknowledge Purchase Order	Suppliers select a vendor to navigate to its POA pages. Available only if more than one vendor is associated with the user.
Acknowledge Purchase Orders - Search/Filter Acknowledgements	PO_SS_POA_SEARCH	• Manage Orders, Acknowledge Purchase Orders. Optionally select a vendor on the Acknowledge Purchase Orders - Select Vendor page. • Click the Show All Acknowledgements link on the Recently Dispatched POs pagelet.	Search for dispatched purchase orders awaiting acknowledgement, or existing supplier-entered or EDX-submitted POAs. Also, view past POAs.
Acknowledge Purchase Orders - Acknowledgement Summary	PO_SS_POA_SUMMARY	• Click a linked purchase order number value on the Acknowledge Purchase Orders - Search/Filter Acknowledgements page. • Click a linked Acknowledge Status value on the Recently Dispatched POs pagelet.	Create new POAs, maintain existing POAs, or view accepted POAs. **Note.** EDX POAs are shown in the results as information, but can not be changed online. (They can be seen in history as well.)
Acknowledge Purchase Orders - Acknowledgement Details	PO_SS_POA	Click a line number link on the Acknowledge Purchase Orders - Acknowledgement Summary page.	View POA line details.
PO Changes - Details	PO_SSPOLNCHG_SP	Click the Change Order link for changed order lines on the Acknowledge Purchase Orders - Acknowledgement Details page. This link only appears for change order purchase orders.	Review the purchase order line changes for a selected purchase order line.

Page Name	Definition Name	Navigation	Usage
Ship to Comments	PO_SS_SHIPCOMM_SP	Click the Comments button on the Acknowledge Purchase Orders - Acknowledgement Details page.	Review Ship To comments or attachments for a selected purchase order schedule. This button only appears if there are Ship To comments.
Acknowledge Purchase Orders - Acknowledgement Summary - History	PO_SS_POA_SUMMARY	Click a linked purchase order number value in history mode on the Acknowledge Purchase Orders - Search/Filter Acknowledgements page.	View the history of a POA.

Searching for POAs

Access the Acknowledge Purchase Orders - Search/Filter Acknowledgements page (Manage Orders, Acknowledge Purchase Orders).

This page essentially duplicates the Manage PO Acknowledgements page (as documented later in this chapter), with these exceptions.

See

The supplier selects the criteria with which to filter the search. In particular:

From Date and **To Date** Select the purchase order dispatch date range.

Current Acknowledgements Select a status of the POAs you want to search on. Values are *New/Supplier Review* and *Supplier Respond/Buyer Accepted.*

See

View History If you select this option, the system displays the supplier responded history for past POAs.

Orders Per Page Select the number of lines that you want to display on this page. The default value for the field is set using PeopleSoft eSupplier Connection installation options. You can change the value to *12,25, 50, 100,* or *All.* The First and Last buttons enable you to scroll through purchase order acknowledgements and view scrolling and total values.

PO Status Displays the change order revision if the line is a change order; otherwise, it indicates that the purchase order is being dispatched for the first time.

Source of Acknowledgement	Displays the source of the acknowledgment. Values are *Online* or *EDX*.
	POAs created using PeopleSoft eSupplier Connection POAs are always created as source of Online. (On the buyer side, within PeopleSoft Purchasing, online and EDX POAs are consolidated for review and approval on this page by the buyer.)
	If you are viewing current acknowledgements, depending on the Source of the POA, clicking the purchase order number takes the supplier to the Acknowledge Purchase Orders - Acknowledgement Summary page for online collaborative POAs. POAs with a source of EDX can not be changed by the supplier, they are shown for informational purposes. (However, on the buyer sided POAs with a source of EDX will take the buyer to the Review POA page for EDX which is not collaborative.
	If you are viewing history, clicking the purchase order number takes the supplier to the Acknowledge Purchase Order - Acknowledgement Summary - History page. Using the history page you can view the POA history.
	See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Purchase Orders Online," Using Purchase Order Acknowledgements.
	See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Purchase Orders Online," Reviewing Acknowledgement Header Information.

Creating Online POAs

Access the Acknowledge Purchase Orders - Acknowledgement Summary page (click a linked purchase order number value on the Acknowledge Purchase Orders - Search/Filter Acknowledgements page).

Acknowledge Purchase Orders - Acknowledgement Summary

The fields on this page essentially duplicate those on the Managing PO Acknowledgements - Acknowledgement Summary page, although the suppliers always access this page in *create* mode, while buyers can create, review, and approve POAs.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Purchase Orders Online," Reviewing Acknowledgement Header Information.

The system displays purchase order or POA history details in view-only fields. The supplier can accept or reject the entire purchase order or the selected line item, or enter changes in the editable fields. In particular:

Line	Click the linked line number to review and modify the details of the line such as quantity or date.
Reset to PO Values	Click this button to restore all POA values to the values specified on the current purchase order, forgoing any changes made on the POA.
PO Header Detail	Click the arrow to expand this section. This section displays the purchase order header details.

Standard BU Comments   Click this arrow to expand this section. This section displays any comments that are associated to the PeopleSoft Purchasing business unit. If there are no business unit level comments, the system doesn't display this section.

PO Header Comments   Click this arrow to expand this section. This section displays any purchase order header comments or attachments associated with the selected purchase order. If there are no header comments or attachments, the system doesn't display this section. If there are multiple rows of header comments/attachments, you can scroll through them or click View All to display all of them.

PO Qty (purchase order quantity)   Displays the sum of all schedule quantities for this line on the purchase order that is being requested.

Acknowledge Quantity   Displays the sum of all schedule acknowledge quantities being replied. The purchase order quantity appears as the default when you first view the purchase order acknowledgement.

Change Order   Click this link for each line that has a change order to access more detail about the change. This shows the details of what changes were made from the last time this purchase order was dispatched. (For example, if this purchase order is on change order 3, it shows the changes made from change order 2 to change order 3.) This link will only appear when viewing a purchase order revision.

Comments   Click this arrow to expand this section. The supplier can enter comments for the buyer, and in subsequent sessions, view any buyer responses.

Save   Click this button to save any changes and have the system set the acknowledgement status to *Supplier Review*. This will indicate to the system that this POA is in process and still under review.

Save & Send Acknowledgement   Click this button to save any changes and:

- Change the POA mode for the vendor from editable to view-only.

- Set the acknowledgement status to *Buyer Accepted* if there is no change or the changes that are made do not exceed the tolerances specified for the supplier.

- Sets the acknowledgement status to *Supplier Responded* if there are changes the buyer needs to approve.

  If workflow is enabled, this also sends notification to the buyer for the POA with changes needing review.

- Updates the Purchasing EC tables (PO_POA_HDR_HIST, PO_POA_LN_HIST, PO_POA_SHIPHIST) to capture supplier response history and pertinent purchase order values at the time the response is made.

Send Email   Click this link to access the Acknowledge Purchase Orders - Email Message page. Using this page the supplier can send an ad hoc email containing URLs to access the POA directly.

See Also

Viewing and Changing Acknowledgement Details

Access the Acknowledgement Purchase Orders-Acknowledgement Details page (click a line number link on the Acknowledge Purchase Orders - Acknowledgement Summary page).

Acknowledgement Purchase Orders - Acknowledgement Details page

Change Order	Click the Change Order link to access more detail about changes to schedules. This shows the details of what changes were made from the last time this purchase order was dispatched. For example, if this purchase order is on change order 3, it shows the changes made from change order 2 to change order 3.
Change Order check box	The system displays the check box if there is a change order for this schedule. To view these changes, you must click the Change Order link. This is a visual indicator to help identify which schedules were modified from the last dispatch.
Acknowledge Due Date and Quantity	The system provides these fields as a default to the Purchase Order. Suppliers can modify Due Date, Quantity, and other values for the line/schedule to indicate a change.
(Split Line button icon)	Click the Split Line button to split the schedule if the scheduled quantity is to be backordered between two or more dates. After clicking the split line button, adjust the quantities between the original and new line and enter a new acknowledge due date for the new schedules quantity.

Comments   Click this button for each schedule that includes Ship To comments or attachments to view the comments. The comments and attachments are specific to each ship to location, so if all lines and schedules have the same ship to address, all the ship to comments and attachments will be the same.

Reviewing and Approving Online POAs (Buyers)

Once the supplier has created an online POA, the buyer can review the information, and accept, reject, or change the acknowledgement.

This section discusses how the buyers:

•   Search for online POAs.

•   Review and approve online POAs.

Pages Used to Review and Approve Online POAs

Page Name	Definition Name	Navigation	Usage
Manage PO Acknowledgements	PO_SS_POA_SEARCH	Purchasing, Purchase Orders, Acknowledgements, Manage PO Acknowledgements	Buyers can search for online POAs and POAs received using EDX. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Purchase Orders Online," Using Purchase Order Acknowledgements.
Manage PO Acknowledgements - Acknowledgement Summary	PO_SS_POA_SUMMARY	Click a linked purchase order number on the Manage PO Acknowledgements search page.	Use to view the acknowledgement information for the selected purchase order.
Manage PO Acknowledgements - Acknowledgement Details	PO_SS_POA	Click a linked purchase order line on the Manage PO Acknowledgements - Acknowledgement Summary page.	Review and approve supplier-entered POAs.

Page Name	Definition Name	Navigation	Usage
Run Acknowledgement Alerts	PO_POA_ALERTS	Purchasing, Purchase Orders, Acknowledgements, Run Acknowledgement Alerts, Run Acknowledgement Alerts	Initiate the Purchase Order Acknowledgements Alert Application Engine process (POA_ALERTS), which will generate worklist entries (alerts) for the buyer. Buyers will receive a worklist entry for each purchase order that is violating the defined rules for when a POA should be received by the supplier. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Delivered Workflows for PeopleSoft Enterprise Purchasing."
Run PO AutoChange	RUN_PO_AUTOCHNG	Purchasing, Purchase Orders, Acknowledgements, Process Change Orders, Run PO AutoChange	Initiate the Purchase Order Automatic Change Application Engine process (PO_AUTO_CHNG). This process will initiate the Load Change Requests process and then the Process Change Orders process to create change orders for all POAs that have been approved by the Buyer (or automatically approved based on tolerances) that are pending in the system.

Searching for Online POAs

Access the Manage PO Acknowledgements page (Purchasing, Purchase Orders, Acknowledgements, Manage PO Acknowledgements).

This page essentially duplicates the Acknowledged Purchase Orders - Search/Filter Acknowledgements page, with these exceptions:

Vendor Set ID and **Vendor ID**	The buyer can search for a vendor within a specific setID.
Current Acknowledgements	The buyer can search for awaiting acknowledgement, supplier responded, or buyer accepted POAs. They can not see any in-process POAs with a status of *Supplier Review*.

Note. The buyer can create a POA on behalf of the supplier by using the Awaiting Acknowledgement check box on this page.

View History	If you select this option, the system displays the supplier responded history for past POAs.
Processed	Indicates whether the (changed) POA has been included in a Load Change Request process run.

See Also

Reviewing and Approving Online POAs

Once the supplier submits a POA online, the buyer can access this page to review information such as acknowledged dates and quantities for the given purchase order. From here your buyers can:

- Review overall POA response at the header level.

- Review any line level exceptions.

- Modify and react to them accordingly within this page, which includes changing the POA information or sending the POA back to the supplier for further review.

- Approve the POA so that it can be passed to the Change Order processes and update the purchase order.

  If using workflow, this action also marks the entry as worked in the worklist for the buyer associated to the purchase order.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Purchase Orders Online," Reviewing Acknowledgement Header Information.

Access the Manage PO Acknowledgements - Acknowledgement Summary page for online POAs (Purchasing, Purchase Orders, Acknowledgements, Manage PO Acknowledgements).

Manage PO Acknowledgements - Acknowledgement Summary page

The fields on this page essentially duplicate those on the Acknowledge Purchase Orders - Acknowledgement Summary page, although the suppliers always access this page in "create" mode, while your buyers are able to use "create, review, modify, and approve" mode.

In addition, the buyers have the option to immediately create change orders by selecting the Run PO Auto Change check box and then saving and approving the POA.

See Chapter 4, "Acknowledging Purchase Orders Online," Creating Online POAs (Suppliers), page 40.

Note. POAs that are created by way of EDX are visible in the summary results but not visible within this collaborative POA page. Clicking a POA that was created from EDX will transfer the buyer to the EDX review pages discussed in the purchasing section.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Purchase Orders Online," Using Purchase Order Acknowledgements.

Reset to PO Values	Click this button to revert the POA to the values submitted on the original purchase order.
Save	Click this button to save any changes; acknowledgement status remains as *Supplier Responded or Buyer Accepted.*

Save & Approve	Click this button to save any changes and set the acknowledgement status to *Buyer Accepted.* This enables the POA to be processed by the PeopleSoft Purchasing Load Change Request process. This also marks any worklist entry as worked for the buyer associated to the purchase order, if workflow is enabled.
Return for Supplier Review	Routes the POA back to the supplier. Acknowledgement status is changed to *Supplier Review.* Buyer can include comments for the supplier, which the supplier can review as part of an iterative review and acknowledgement process on the supply side.
Run PO Auto Change	Select this check box if you want the system to automatically create change orders that are reflected on the POA. Once you select this check box and click the Save & Approve button the system will automatically run the Purchase Order Auto Change process. This process runs the Load Change Requests process and then the Process Change Order process in the background. You should have the PO Business Unit setting to enable auto approval of buyer approved POAs turned on, for this to work successfully. Otherwise the changes will stop in between the two jobs pending another approval step.

Responding on Behalf of the Supplier (Buyers)

This section discusses how to respond on behalf of the supplier.

Pages Used to Respond on Behalf of the Supplier

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage PO Acknowledgements	PO_SS_POA_SEARCH	Purchasing, Purchase Orders, Acknowledgements, Manage PO Acknowledgements	Buyers can search for online POAs and POAs received using EDX. See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Creating Purchase Orders Online," Using Purchase Order Acknowledgements.
Manage PO Acknowledgements - Acknowledgement Summary	PO_SS_POA_SUMMARY	Click a linked purchase order number on the Manage PO Acknowledgements search page.	Use to view the acknowledgement information for the selected purchase order.
Manage PO Acknowledgements - Acknowledgement Details	PO_SS_POA	Click a linked purchase order line on the Manage PO Acknowledgements - Acknowledgement Summary page.	Review and approve supplier-entered POAs.

Responding On Behalf of the Supplier

Access the Manage PO Acknowledgements page (Purchasing, Purchase Orders, Acknowledgements, Manage PO Acknowledgements).

The buyer can accept and create acknowledgements for the supplier against a purchase order. For example, the supplier called them with changes and the buyer wants to log them as acknowledgements.

This process basically functions the same as that discussed in the section Reviewing and Approving Online POAs (Buyers) except the buyer will search for POAs with an *Awaiting Acknowledgement* status.

Select the Awaiting Acknowledgement check box on this page under the Current Acknowledgements option to retrieve the POAs that you want to address for the supplier.

Chapter 5

Creating Advanced Shipping Notices

This chapter provides an overview of supplier advanced shipping notices (ASNs) and discusses how to:

- Create supplier ASNs.

- Review ASN history by suppliers.

- Review ASN history by employees.

Understanding Supplier ASNs

In most PeopleSoft documentation, *ASN* refers to internal PeopleSoft system users sending notification of shipment to an external party, and *advance shipping receipt (ASR)* refers to internal PeopleSoft users receiving or entering information that is derived from an external source.

In PeopleSoft eSupplier Connection, ASN refers to the shipment notification that helps your internal users in the receiving process, and that the supplier enters directly into the PeopleSoft system. Suppliers can use the Recent ASNs (recent advanced shipment notifications) pagelet to enables suppliers to navigate to shipment and receipt line information as well as create ASNs from your extranet homepage.

Supplier ASNs Are Created Against Your Purchase Orders

Suppliers view the lines and schedules for one or more purchase orders (POs), select specific records, and create ASNs that communicates shipment number, bill of lading, Pro number, Invoice number, carrier ID, expected arrival date, and carrier information. For evaluated receipt settlement related invoices (ERS) the Invoice information entered by the supplier is required and utilized for payment processing. Online ASNs also include line information such as item, revision, lot, serial, quantity shipped, and related supplier (sales) order numbers.

When suppliers perform searches for available PO schedules, the system returns all dispatched PO lines with an *Active* status that are not included in:

- Direct (drop) shipment POs.

- Flow-based kanban POs.

Once Supplier ASNs Are Submitted

When suppliers submits their ASNs, they are treated internally (and referred to in the PeopleSoft Purchasing documentation) as ASRs. Upon submission, the system:

- Assigns an enterprise integration point (EIP) control ID.

- Populates the EC staging tables:

    - RECV_ASHD_EC (ASN header table).

    - RECV_AOHD_EC (ASN Inventory header table).

    - RECV_AOLN_EC (ASN Inventory order line table).

    - RECV_AOLS_EC (ASN Inventory order lot serial table).

- Treats the advance shipment information, during Receive Load processing, as if it were an ASR that the system received electronically by EDX using the ASR EIP.

Note. Your suppliers cannot change or cancel ASNs once they submit the ASNs. However, your employees can maintain them using the ASR Review component in PeopleSoft Purchasing. Your employees can also use the ASN History component to search for supplier ASNs using a variety of search criteria.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Receiving Shipments," Using ASRs

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Receiving Shipments," Loading Receipts Received Using EIPs and EDC

Creating Supplier ASNs

This section discusses how to create supplier ASNs.

Pages Used to Create Supplier ASNs

Page Name	Definition Name	Navigation	Usage
Advance Shipment Notification - Select Vendor	PO_SS_VND_LIST	Manage Orders, Create ASNs	Suppliers select a vendor to navigate to its ASN creation pages. This page is available only if more than one vendor is associated with the user, and if the user uses the menu to log on.
Advance Shipment Notification - Advance Shipment Creation	PO_SSASN_CREATION	Manage Orders, Create ASNs Click the Create ASNs link on the Recent ASNs pagelet.	Create supplier ASNs.

Page Name	Definition Name	Navigation	Usage
Advance Shipment Notification - Purchase Order Schedule Selection	PO_SSASN_SHIPMENTS	Enter a shipment number on the Advance Shipment Creation page, and click the Add Lines button.	Select PO lines and schedules for ASNs.
Advance Shipment Notification - Lot/Serial Information (inquiry)	PO_SSASN_LOTSERIAL	Select a lot- or serial-controlled item, and click the Lot/Serial link on the Advance Shipment Creation page.	Assign lot IDs or serial IDs to selected item IDs.

Creating Supplier ASNs

Access the Advance Shipment Creation page (Manage Orders, Create ASNs).

To create an online ASN:

1. Enter the ASN header information including any defaults (such as order number) which will be applied to all ASN lines as they are added.

   The shipment number is required.

2. Click Add Lines to access the Purchase Order Schedule Selection page and search for the appropriate (dispatched) PO lines to include in the ASN.

   a. Enter a vendor location if the vendor is associated to more than one (if not, the location appears by default), a purchase order number, and an item ID or vendor item ID; and optionally change the default date range to further control the search.

      Select the Exclude Received Schedules check box to prevent previously received schedules from being included in the search.

      To ease data entry on the supplier side, you can enter a date range and item number to identify which POs are awaiting shipment for the item.

   b. Click Search.

      The system returns all PO lines and schedules that meet the search criteria and are available to be shipped. If the page was already populated with data from a different PO, the system doesn't refresh the page until you click this button.

3. Select one ore more resulting PO Schedule lines to indicate the line is to included with the ASN.

   Note. You can select a PO schedule for inclusion more than once, but the system adds it only once to the ASN. Also, the from and to dates narrow down the expected shipment based on scheduled due date on the purchase order schedule lines.

4. Add the selected PO schedule to the ASN:

    a. Click Include in ASN (include in advance shipment notice) to clear the search results, transfer the selected PO lines to the Advance Shipment Creation page, and remain on the Purchase Order Schedule Selection page to perform another search and add more lines to the ASN.

    b. Click Include/View ASN (include and return to advance shipment notice) to access and transfer the selected PO lines to the Advance Shipment Creation page (or return to the page without selecting more lines).

5. Now that the Advance Shipment Creation page is now populated with current information for the selected schedules:

    a. You can modify the shipment line number, revision, shipped quantity, ship unit of measure (UOM), invoice ID, bill of lading, pro number, and vendor sales order number.

    > **Note.** The Shipped quantity field displays *outstanding* quantities: the quantity ordered minus any previous receipts for the purchase order schedule in the vendor UOM.
    >
    > If the ERS Action on the PO Matching page is set to Yes, the system requires an invoice ID form the supplier.

    b. The supplier can associate lot or serial numbers to lot- or serial-controlled items by selecting the radio button on the appropriate line and clicking the Lot/Serial link to access the Lot/Serial Information page.

    Enter the lot or serial ID for the selected item and click Return to return to the Advance Shipment Creation page.

6. Click Submit ASN (submit advanced shipping notice) to create the ASN.

    The system saves the ASN data to the EC staging tables and, from this point on, processes the data as if it were an ASR that was entered using the ASR EIP.

    See

7. To send an email containing a URL to the ASN, click ASN History to access the ASN History component.

    > **Note.** The Send Email link is located on the ASN History - Summary and Line Details pages; the ad hoc email function automatically generates a URL to the page from which it is generated.

Reviewing ASN History by Suppliers

This section lists the pages used to review ASN history by suppliers.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Receiving Shipments," Using ASRs

Pages Used to Review ASN History by Suppliers

Page Name	Definition Name	Navigation	Usage
ASN History - Select Vendor	PO_SS_ASN_VND_LIST	Manage Orders, View ASN History	Suppliers select a vendor to navigate to its ASN inquiry pages. This page is available only if more than one vendor is associated with the user.
ASN History - Filter Options	PO_SSASN_HIST_SRCH	Manage Orders, View ASN History Click the ASN History link on the Advance Shipment Creation page. If you are utilizing the Recent ASNs pagelet your suppliers can click the Show all/Enhanced link within the Recent ASNs pagelet to review ASNs.	Suppliers search for specific ASNs.
ASN History - Summary	PO_SSASN_HDRHIST	Suppliers who are using menu navigation select a vendor (if necessary), enter search criteria, and click the Search button on the ASN History - Filter Options page.	Suppliers and employees view purchase order and shipment information for supplier ASNs.
ASN History - Line Details	PO_SSASN_LNHIST	Click a shipment number on the ASN History - Summary page. If you are utilizing the Recent ASNs pagelet, your suppliers can click a shipment number to view shipment details.	Suppliers and employees view line details for selected shipments.
Advance Shipment Notification - Lot/Serial Information (inquiry)	PO_SSASN_LOTSERIAL	Click a shipment quantity on the ASN History - Line Details page.	View lot or serial information for selected items.
Email Message	WV_PE_EMAIL_SP	Click Send Email on the ASN History - Summary or ASN History - Line Details page.	Suppliers can send an email to a supplier or an internal PeopleSoft user regarding the ASN. The email includes links that take the recipient to the page from which the email was sent.

Reviewing ASN History by Employees

This section lists pages used to review ASN history by employees.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Receiving Shipments," Using ASRs

Pages Used to Review ASN History by Employees

Page Name	Definition Name	Navigation	Usage
ASN History - Filter Options	PO_SSASN_HISE_SRCH	Purchasing, Shipments, ASN History	Employees search for supplier ASNs.
ASN History - Summary	PO_SSASN_HDRHIST	From the Purchasing menu, click the Search button on the ASN History - Filter Options page.	View purchase order and shipment information for the supplier ASN. Suppliers also use this page.
ASN History - Line Details	PO_SSASN_LNHIST	Click a shipment number on the ASN History - Summary page.	View line details for selected shipments. Suppliers also use this page.
Advance Shipment Notification - Lot/Serial Information (inquiry)	PO_SSASN_LOTSERIAL	Click a shipment quantity on the ASN History - Line Details page.	View lot or serial information for selected items.
Email Message	WV_PE_EMAIL_SP	Click the Send Email link on the ASN History - Summary or ASN History - Line Details page.	Employees can send an email to a supplier or an internal PeopleSoft user regarding the ASN. This email includes links that take the recipient to the page from which the email was sent.

Chapter 6

Reviewing Supplier Account Activity

This chapter provides an overview of supplier account activity, lists common elements, and discusses how to:

- Set up supply side print capability.

- Review POs.

- Review order summaries.

- Review receipts.

- Review invoices.

- Review payments.

- Review account balances.

Understanding Supplier Account Activity

Review activity transactions permit your accounts payable employees to spend their time more efficiently by enabling your suppliers to answer their own questions about existing invoices, purchase orders (POs), receipts, payments, and account balances.

Common Element Used in This Chapter

Item ID   Displays the vendor item identifier, if defined for the selected vendor-item combination on the Purchasing Attributes - Item Vendor page. If no vendor-item information exists, then your item ID appears.

Setting Up Supply Side Print Capability

To configure the setup and defaults of external access for suppliers, use the Configure External Access component (PO_SUPP_SETUP).

For users created prior to release 8.8, you may need to set up security so that suppliers can use the print functionality with PeopleSoft eSupplier Connection. You need to:

- Edit the permission list supplied to all external Supplier users to enable permission for supply side print.

  If you are using the delivered EPSS8000 permission list (recommended), then you will not need to do this step as the permission list will already be modified.

- Edit any existing Supplier Portal User profiles to which you wish to add the PO Print capability.

  Edit user profiles in the PeopleTools User Profile component.

This section discusses how to:

- Set up security.

- Configure external access.

Pages Used to Set Up Supply Side Print Capability

Page Name	Definition Name	Navigation	Usage
Permission Lists - Process	ACL_PROCESS	PeopleTools, Security, Permissions & Roles, Permission Lists. Select the Process tab.	Set the attributes and system defaults.
Permission Lists - Permission	ACL_PROCESS_GROUPS	PeopleTools, Security, Permissions & Roles, Permission Lists Click the Process Group Permissions link on the Permission List - Process page.	Specify to what capacity a user, or Role, can modify certain Process Scheduler settings.
User Profile	USER_GENERAL	PeopleTools, Security, User Profiles, User Profiles	Set general user profile attributes.
Configure External Access	PO_SUPP_SETUP	Set Up Financials/Supply Chain, Common Definitions, Suppliers, Configure External Access	Make the View PDF/Print option available to suppliers and indicate the default server.

Setting Up Security

Access the Permission List - Process page (PeopleTools, Security, Permissions & Roles, Permission Lists and select the Process tab).

This step enables the supply side permission list to allow for printing POs. If you are using the delivered permission list EPSS8000, then this step will already be done for you.

1. Enter permission list that is equivalent to the *EPSS8000-All user access,* permission list that you are using for suppliers and select the Process page.

2. Click the Process Group Permissions link on the Process page. Access the Permission List - Permission page.

3. Add *POALL* to the grid, and click OK. The POALL Process group is required on this page so that the supplier user has security to run the PO Print report.

   Note. This does not allow suppliers to run other internal buyer side PO processes.

4. Access the User Profile page in PeopleTools for any existing supplier users added in prior releases for which you want to enable print capability, and if the Process Profile field is blank, enter the permission list you modified, *EPSS8000,* in the Process Profile and Primary Permission Lists fields.

   Note. For any external users already created in the system, you must edit the user profile if you want them to have print capability. This will be done automatically for any new external user as long as they are created using the Distributed Vendor User pages. If you aren't already using the delivered permission lists, you only need to make sure there is a permission list called *EPSS8000* defined in the system. It can be an empty permission list, but it does need to exist so that the Distributed Vendor User page can automatically enable printing for new users.

Configuring External Access

Access the Configure External Access page (Set Up Financials/Supply Chain, Common Definitions, Suppliers, Configure External Access).

Allow Supplier access to launch/print PO report	Select to allow suppliers to view and print POs.
Print Options	Options include creating the report *via REN Server* or *via Report Repository.*
	If you are using REN server capability, the system displays a separate window to monitor the report status when the supplier clicks the button to print the PO, enabling your supplier to go on to other transactions. When the report is ready, the system displays it in a separate window.
	If you are using the Report Repository, the system initiates the print process immediately when the supplier clicks the button to print the PO. If the print process takes more than several seconds, the system generates a message that they can continue within the same transaction and return to the button later when the report is completed.
	Note. If you are using REN server capability, you must set up a REN server that users outside your firewall can access. The Report Repository requires less setup. We recommend trying the Report Repository method first and migrating to REN server technology if needed.

Reviewing POs

This section discusses how suppliers can:

•   Use the purchase order list.

• Review PO details.

Pages Used to Review POs

Page Name	Definition Name	Navigation	Usage
Purchase Orders - Select Vendor	PO_SS_VND_LIST	Manage Orders, Purchase Orders	Suppliers select a vendor to navigate to its PO inquiry pages. This page is available only if more than one vendor is associated with the user.
Purchase Orders - Filter Options	PO_SSSRCH_POS	Manage Orders, Purchase Orders Optionally select a vendor on the Review Purchase Orders - Select Vendor page.	Search for POs.
Purchase Orders - Purchase Order List	PO_SSPOLST	Enter selection criteria and click the Search button on the Review Purchase Orders - Filter Options page.	View general PO information and select from the list of available POs for greater detail.
Purchase Orders - Download Purchase Orders	PO_SSPO_DOWNLOAD	Click the View Selected POs in Downloadable Format button on the Purchase Order List page.	Use to determine which columns you want to include when downloading purchase order information to an excel spreadsheet.
Purchase Orders - Purchase Order Details	PO_SSPO_DETAILS	• Click a PO number link on the Purchase Order List page. • Click a PO ID link on the Recent Purchase Orders pagelet.	Review line item details and access invoices that are related to a selected PO.
Purchase Orders - Purchase Order History	PO_SS_POHIST_SP	Click the View PO Change History link on the Purchase Order Details page.	View the revision history for the purchase order. This will take you to another page that displays a listing of all the Purchase Order change history and will enable you to drill into previous purchase orders to see past changes.

Page Name	Definition Name	Navigation	Usage
PO Changes - Details	PO_SSPOLNCHG_SP	Click the View Changes link on the Purchase Order History page or the View PO Changes link for the changed order lines on the Purchase Order Details page.	View the line and schedule changes for a purchase order change order.
Purchase Orders - Line Comments	PO_SS_LNCOMM_SP	Click the Comments button on the Purchase Order Details page.	Review line comments or attachments for a selected purchase order line.
Purchase Orders - Purchase Order Schedule	PO_SSPO_SCHEDULE	Click a line number link on the Review Purchase Orders - Purchase Order Details page.	Review PO schedule details and drill into receipt line information. This page is a duplicate of the Review Invoices - Purchase Order Schedule page.
Purchase Orders - Receipt Lines	PO_SSRECV_LINES	Click the due date link on the Purchase Order Schedule page.	View lines received against the purchase order schedule.
Purchase Orders - Ship to Comments	PO_SS_SHIPCOMM_SP	Click the Comments button for a selected purchase order schedule on the Purchase Order Schedule page.	Review Ship To comments or attachments for a selected purchase order schedule.
Purchase Orders - Invoice Details	PO_SSINVC_LINES	Click an invoice number link on the Review Purchase Orders - Purchase Order Details page.	This page is a duplicate of the Review Invoices - Invoice Details page.

Using the Purchase Order List

Access the Review Purchase Orders - Purchase Order List page (Manage Orders, Purchase Orders, and enter selection criteria and click the Search button on the Review Purchase Orders - Filter Options page).

Acknowledge Purchase Orders - Acknowledgement Summary

Use this page to move between various supplier activities related to purchase orders including inquiry, printing, downloading, acknowledgements, and entering advanced shipment notifications.

Default View for Change Orders	If your purchase order list includes a PO with a change order, you can view *All lines* or *Latest changes only* when you view PO details for a PO. When viewing or printing a purchase order in PDF format, *All lines* prints all lines on the PO, and *Latest changes only* prints only the changes on the report.
Orders Per Page	Select the number of lines that you want to display on this page. The default value for the field is set using PeopleSoft eSupplier Connection installation options. You can change the value to *12,25, 50, 100,* or *All.* The First and Last buttons enable you to scroll through purchase orders and view scrolling and total values.
Lines	Equals the total number of lines on each PO. Supplier users can use this information to help evaluate and prioritize which POs need to have action taken first.
Total Amount	Equals the merchandise amount plus the adjusted amount for each PO.
Acknowledge Status	The text of this link indicates the current POA status. Click the linked status to create or access the purchase order acknowledgement for the selected purchase order. Each time a PO or change order for a PO is dispatched, the system changes its default status to New.
Create ASN	Click to access the Advanced Shipment Notification - Purchase Order Schedule Selection page to choose lines to create an advanced shipping notification. The system transfers the PO ID you selected to the ASN.

View ASN	Click to display any ASNs that are tied to the purchase order. This button only appears if ASNs exist for the purchase order.
View PDF	Click to initiate the PO report process, which runs in the background. You can then print the purchase order from the PDF. You must select the printing option on the Configure External Access page for suppliers to view and print PDFs.

Note. When REN Server method is not used for viewing the PDF and ten seconds has passed but the PDF has not opened, the system displays a message explaining that the process is taking longer, wait a few seconds and then click the button again. The system then checks to see if the report is finished and when it is, pulls the PDF up immediately.

You must stay within the transaction or else clicking the button again will regenerate the report. You can navigate to other pages and look at other POs, and so forth, but leaving the transaction loses the link to the report.

When the REN Server method is used for viewing the PDF, a new window will open when the report has finished.

View Selected PDFs in Downloadable Format	For every row selected, the system displays the PO information in a grid that you can then use to download to an excel spreadsheet.

See Also

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Defining Purchasing Item Information," Defining Purchasing Item Attributes

Reviewing PO Details

Access the Review Purchase Orders - Purchase Order Details page (click a PO number link on the Purchase Order List page).

Purchase Order Details page

The system displays PO line item details.

View PO Change History	This link shows the history of initial dispatch any subsequent change order dispatch information for the purchase order
View	If your purchase order list includes a PO with a change order, you can view *All lines* or *Latest changes only* when you view PO details for a PO. The system provides the value selected on the Purchase Order List page as a default.
Purchase Order Total	Includes the merchandise amount totalled for each line added to any freight, tax, and any miscellaneous charges. This excludes any canceled lines.

Purchase Order Lines

Line	Click a line link to access the Purchase Order Schedule page, which displays schedule details for the line item.
Status	Values are *Active, Closed, Hold,* and *Canceled.* (Approved POs do not appear.)
	Click to access the Line Comments/Attachments page.

Express Forms

 If the Purchase Order line was sourced from a PeopleSoft eProcurement Requisition Express Form item, the system displays a button to display the Express Form information pertaining to the line.

Express Form page

See *PeopleSoft Enterprise eProcurement 9.1 PeopleBook*, "Using Special Requests and Express Forms to Create Requisitions."

Change Orders

Change Order   When change orders are present for the line item click here to access the PO Changes - Details to see the change order information pertaining to the line.

Invoice List

Invoice   Click an invoice link to access the Invoice Details page.

See Also

Reviewing Order Summaries

This section discusses how to:

• View schedule information.

• View change order information.

Pages Used to Review Order Summaries

Page Name	*Definition Name*	*Navigation*	*Usage*
View Order Summary - Select Vendor	PO_SS_VND_LIST	Manage Orders, View Order Summary	Suppliers select a vendor to navigate to its order summary inquiry pages. This page is available only if more than one vendor is associated with the user.
View Order Summary - Filter Options	PO_SSSRCH_SCHEDULE	Manage Orders, View Order Summary Optionally select a vendor on the View Order Summary - Select Vendor page.	Search for orders based on PO search criteria. **Note.** Leaving all criteria fields blank results in no returned orders.
View Order Summary - Order Schedule	PO_SSSUPP_SCHED	Enter selection criteria and click the Search button on the View Order Summary - Filter Options page.	Review existing PO schedules, change orders, and planned POs. To view planned POs, you must have PeopleSoft Supply Planning installed, and you must have run the Receive Planning Messages process.
View Order Summary - Shipping Address	PO_SSSHIPTO_ADDR	Click a ship to link on the View Order Summary - Order Schedule page.	Review ship to addresses for a PO schedule.
View Order Summary - Change Order Details page	PO_SSSUPP_SCH_CHOR	Click a change order link on the View Order Summary - Order Schedule page.	Review any change order details.

Viewing Schedule Information

Access the View Order Summary - Order Schedule page (enter selection criteria and click the Search button on the View Order Summary - Filter Options page).

The system displays details for the order line's selected schedule. In particular:

Type	*PO:* Existing PO.
	Plan: Planned PO.
Status	Planned PO: *Approved* or *Not Approved.*
	Existing PO: *Initial, Open, Approved, Pending Approval, Canceled, Complete,* or *Dispatched.*
Ship To	Click a value to access the Shipping Address page, which displays shipping address details.
Change Order	Click a value to access the Change Order Details page, which displays details of any applicable change orders. If a change order is suggested by planning, either the PO schedule can be canceled, or its due date can be changed. This link does not appear if there are no change orders.

Viewing Change Order Information

Access the View Order Summary - Change Order Details page (click a change order link on the View Order Summary - Order Schedule page).

The system displays details for the changed order.

Change Type	Values are *Change, Hold, Inserted,* and *Canceled.*
Source	The source planning system.

Reviewing Receipts

This section discusses how to review receipt details.

Pages Used to Review Receipts

Page Name	Definition Name	Navigation	Usage
Review Receipts - Select Vendor	PO_SS_VND_LIST	Manage Orders, View Receipts	Suppliers select a vendor to navigate to its receipt inquiry pages. This page is available only if more than one vendor is associated with the user.
Review Receipts - Filter Options	PO_SSSRCH_RECEIPTS	Manage Orders, View Receipts Optionally select a vendor on the Review Receipts - Select Vendor page.	Search for vendor receipts.
Review Receipts - Receipt Lines	PO_SSRECVLST	Enter selection criteria and click the Search button on the Review Receipts - Filter Options page.	Review receipt information and access receipt line details.
Review Receipts - Receipt Details	PO_SSRECV_DETAILS	Click a receiver ID link on the Review Receipts - Receipt Lines page.	Review receipt line details.

Reviewing Receipt Details

Access the Review Receipts - Receipt Details page (Manage Orders, View Receipts, click a receiver ID link on the Review Receipts - Receipt Lines page).

The system displays details for the selected receipt.

Receipt Status	Values are *Fully Received, Canceled, Closed Receipt, Hold Receipt, Moved to Destination, Open, PO Not Received* (purchase order not received), or *PO Partially Received* (purchase order partially received).
Net Receipt Quantity	Net shipment quantity that was received (determined by the quantity received minus the quantity rejected minus the quantity returned).

Reviewing Invoices

This section discusses how to:

• Review invoice details.

• Review receipt line information.

Pages Used to Review Invoices

Page Name	Definition Name	Navigation	Usage
Review Invoices - Select Vendor	PO_SS_VND_LIST	Review Payment Information, Invoices	Suppliers select a vendor to navigate to its invoice inquiry pages. This page is available only if more than one vendor is associated with the user.
Review Invoices - Filter Options	PO_SSSRCH_INVOICES	Review Payment Information, Invoices

Optionally select a vendor on the Review Invoices - Select Vendor page. | Search for vendor invoices. |
| Review Invoices - Invoice List | PO_SSREV_INVOICES | Enter selection criteria and click the Search button on the Review Invoices - Filter Options page. | Review general invoice information and access details for a specific invoice. |
| Review Invoices - Invoice Details | PO_SSINVC_DETAILS | Click an invoice number link on the Review Invoices - Invoice List page. | Review invoice details and access other detail pages. |
| Review Invoices - Payment Details | PO_SSPYMNT_DETAILS | Click a reference ID link on the Review Invoices - Invoice Details page. | This page is a duplicate of the Review Payments - Payment Details page.

See Chapter 2, "Maintaining Vendor Information," Establishing Self-Service Security for Vendors, page 4. |
Review Invoices - Purchase Order Lines	PO_SSPO_LINES	Click a PO number link on the Review Invoices - Invoice Details page.	Review PO line details for the invoice and access other detail pages.
Review Invoices - Purchase Order Schedule	PO_SSPO_SCHEDULE	Click a line number link on the Review Invoices - Purchase Order Lines page.	Review schedule details for the selected line.
Review Invoices - Receipt Lines	PO_SSRECV_LINES	Click a received date link on the Review Invoices - Invoice Details page.	This page is a duplicate of the Review Purchase Orders - Receipt Lines page.

Page Name	Definition Name	Navigation	Usage
Review Invoices - Receipt Details	PO_SSRECV_DETAILS	Click a receiver ID link on the Review Invoices - Receipt Lines page.	This page is a duplicate of the Review Receipts - Receipt Details page. See Chapter 6, "Reviewing Supplier Account Activity," Reviewing Receipt Details, page 70.

Reviewing Invoice Details

Access the Review Invoices - Invoice Details page (Review Payment Information, Invoices, and click an invoice number link on the Review Invoices - Invoice List page).

The system displays details for the selected invoice.

Invoice Header Details

Payment Status   Values are *To be Paid, Paid in Full,* or *Approved for Payment.*

Invoice Line Details

Static Amount   Converted cost using a standard unit of measure (for example, rental cost per square foot) that is associated with a statistic code.

Payment Schedule

Status   Payment selection status. Values are *Selected, Unselected, Paid, Canceled, Prepaid, Convert Error, Closed, Negative Voucher Sum,* or *In Process.*

Payments Made

Reference   Click a value to access the Payment Details page, which displays additional payment information.

Purchase Orders

Purchase Order   Click a value to access the Purchase Order Lines page, which displays item details.

Status   Values are *Initial, Open, Complete, Canceled, Dispatched, Approved,* or *Pending Approval.*

Receipts

Received Date	Click a value to access the Receipt Lines page, which displays additional receipt details.

Reviewing Receipt Line Information

Access the Review Invoices - Receipt Lines page (click a received date link on the Review Invoices - Invoice Details page).

The system displays details for the selected receipt line.

Status	Values are *Fully Received, Canceled, Closed Receipt, Hold Receipt, Moved to Destination, Open, PO Not Received,* and *PO Partially Received.*
Rej Reason (reject reason)	*DAM* (damaged goods), *FAL* (failed inspection), *INC* (incomplete shipment), *LAT* (late shipment), *RLY* (early shipment), or *WRG* (wrong goods or services).

Reviewing Payments

This section discusses how to view payment details.

Pages Used to Review Payments

Page Name	*Definition Name*	*Navigation*	*Usage*
Review Payments - Select Vendor	PO_SS_VND_LIST	Review Payment Information, Payments	Suppliers select a vendor to navigate to its payment inquiry pages. This page is available only if more than one vendor is associated with the user.
Review Payments - Filter Options	PO_SS_SEARCH	Review Payment Information, Payments Optionally select a vendor on the Review Payments - Select Vendor page.	Search for vendor payments.
Review Payments - Payments Made	PO_SSPYMNTLST	Enter selection criteria and click the Search button on the Review Payments - Filter Options page.	View a list of payment information that meets the search criteria and access details for a specific payment.

Page Name	Definition Name	Navigation	Usage
Review Payments - Payment Details	PO_SSPYMNT_DETAILS	Click a reference link on the Review Payments - Payments Made page.	Review payment details. This page is a duplicate of the Review Invoices - Payment Details page.

Viewing Payment Details

Access the Review Payments - Payment Details page (Review Payment Information, Payments, and click a reference link on the Review Payments - Payments Made page).

The system displays details for the selected payment.

Method   Payment methods include:

- *ACH:* Automated clearinghouse.

- *Direct DB:* Direct debit.

- *Check System:* Check.

- *Draft:* Promissory payment issued by a supplier or customer.

- *EFT:* Electronic funds transfer.

- *Manual:* Manual check.

- *Wire:* Wire report.

Pay Status   Values are *To be Paid, Paid in Full,* or *Approve for Payment.*

Reviewing Account Balances

This section discusses how to:

- View account balances by currency.

- View invoice account balance details.

Pages Used to Review Account Balances

Page Name	Definition Name	Navigation	Usage
Account Balances - Select Vendor	PO_SS_VND_LIST	Review Payment Information, Account Balances	Suppliers select a vendor to navigate to its account balance inquiry pages. This page is available only if more than one vendor is associated with the user.
Account Balances - Balances by Currency	PO_SSVNDRBALST	This page appears only if the supplier has outstanding vouchers in different currencies. Otherwise, the Account Balances - Invoice List page appears.	View account balances, including the currency in which each balance is shown.
Account Balances - Invoice List	PO_SSVNDRBAL_DTL	Select a vendor on the Account Balances - Select Vendor page. Click a gross amount link on the Account Balances - Balances by Currency page.	Review general invoice account balance information and access details for a specific invoice.
Account Balances - Invoice Details	PO_SSINVC_LINES	• Click an invoice number link on the Account Balances - Invoice List page. • Click an invoice number link on the Purchase Order Details page.	Review account balance details.

Viewing Account Balances by Currency

Access the Account Balances - Balances by Currency page (Review Payment Information, Account Balances). This page appears only if the supplier has outstanding vouchers in different currencies.

Gross Amount   For all outstanding vouchers for the selected vendor. Click a gross amount link to access the Account Balances - Invoice List page, which displays the invoices that are included in the gross amount for this vendor and currency.

Viewing Invoice Account Balance Details

Access the Account Balances - Invoice Details page (click an invoice number link on the Account Balances - Invoice List page).

The vendor name and gross amount appear if you selected them on the Account Balances - Balance by Currency page. Otherwise, the vendor from the Account Balances - Select Vendor page appears.

The system displays detailed information for each invoice in the list.

Payment Schedule

Status   Payment selection status. Values are *Selected, Unselected, Paid, Canceled, Prepaid, Convert Error, Closed, Negative Voucher Sum,* and *In Process.*

Chapter 7

Reviewing Supplier Performance

This chapter provides an overview of supplier performance metrics, lists prerequisites, and discusses how to:

- Define supplier performance targets and tolerances.

- View supplier performance metrics.

See Also

Understanding Supplier Performance Metrics

Supplier performance is crucial to your ongoing relationship with your suppliers. Problems (such as poor quality or late delivery) with supplier shipments can lead to additional expense, a breakdown in the relationship, and, ultimately, exclusion of the supplier.

You can provide your employees (and your suppliers) with ongoing performance measurements against various metrics and provide instant feedback (against predefined targets) if there are delivery or quality problems.

You can generate metrics to track a vendor's on-time, quantity, quality, and quantity ordered versus received performance.

This section discusses:

- Supplier metric access.

- On-time metric.

- Quantity metric.

- Quantity ordered versus received metric.

- Quality metric.

Supplier Metric Access

Supplier performance metrics are available to your internal users as a regular PeopleSoft eSupplier Connection feature. Your suppliers can use the supplier performance pagelets to view these metrics for the vendors to whom they have access in a graphical display and navigate to the performance detail pages.

All users can navigate from one metric to another by changing their selections in the Metric field on any performance detail page, provided that their security settings allow access to all of the pages.

See Also

Chapter 8, "Using PeopleSoft eSupplier Connection Pagelets," page 93

On-Time Metric

The On-Time metric tracks the percentage and actual number of vendor shipments that are on time, early, and late for all of the items within a period. You can base your measurements on one of two methods:

- The number of receipts in relation to the schedule date.

  For example, if you expect one shipment of 100 pieces on February 15 but, instead, you receive the following, the calculation would reflect a 75 percent early metric:

  1. Receiver ID 1, 10 items received on February 11.

  2. Receiver ID 2, 10 items received on February 12.

  3. Receiver ID 3, 10 items received on February 13.

  4. Receiver ID 4, 70 items received on February 15.

- The aggregate receipt quantity in relation to the schedule date.

  Using the previous example, this calculation would reflect a 30 percent early metric.

See Also

Chapter 7, "Reviewing Supplier Performance," Defining Supplier Performance Targets and Tolerances, page 80

Chapter 7, "Reviewing Supplier Performance," Viewing On-Time Performance Details, page 86

Quantity Metric

The Quantity metric tracks the percentage and actual number of vendor shipments (receipts) with correct quantities, over-shipment quantities, and under-shipment quantities by period.

Using the previous example for on-time metrics, the calculation would reflect a 75 percent under metric (three of four receipts were less than the correct scheduled quantity).

Quantity Ordered Versus Received Metric

The PO/Received Quantity (purchase order/received quantity) metric tracks the percentage and actual quantity of the receipts against purchase order (PO) quantity by period.

Using the previous example, the calculation would reflect a 100 percent received metric (100 were scheduled, and 100 were received, regardless of the number of receipts).

Quality Metric

The Quality metric tracks the percentage and actual number of vendor shipment quantities that are inspected, accepted, rejected, and returned by period.

The system calculates a percentage rejected and a percentage returned as part of the quality performance metric. This calculation uses only return-to-vendor records that have a receiver ID and ignores canceled receipts.

You can exempt (or include) certain receiving reject or return reason codes from the percentage of defectives that your supplier performance metrics reflect.

For example, you may not want to use incomplete shipments as a performance measurement for product quality. You can use the Return/Reject Reasons page to remove the Include in Quality Metric flag from that particular reason code.

PeopleSoft Enterprise Source-to-Settle Common Information 9.1 PeopleBook, "Defining Procurement Options"

Prerequisites

Before the system can calculate performance metrics, you must:

1. Build a calendar using the Calendar Builder page in the Common Definitions menu.

2. Set up a procurement analysis reporting entity using the Define Procurement Controls page in the Analyze Procurement menu.

    In particular, you must:

    a. Select the Include Receiver Data and Include PO Data check boxes.

    b. Enter at least one receiving and one purchasing business unit.

        Note. Your business unit selections must include all of the business units that contain the data that you want your suppliers to view. The metrics that appear to suppliers are related only to the reporting entity that you attach to the PeopleSoft eSupplier Performance setup record.

3. Define system targets and tolerances for the reporting entity.

4. (Optional) Define vendor-specific targets and tolerances for the setID.

5. Run the Procurement History Update process (FS_PRCRUPD).

See Also

PeopleSoft Enterprise Application Fundamentals 9.1 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions"

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Analyzing Procurement History," Configuring Procurement Analysis Inquiries

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Analyzing Procurement History," Generating Procurement History

Defining Supplier Performance Targets and Tolerances

To define supplier performance targets and tolerance levels, use the Supplier Performance Setup component (WV_PE_METRIC_SETUP). To vendor supplier performance targets and tolerance levels, use the Supplier Performance Vendor component (WV_PE_METRIC_VNDR).

You can define how the system derives and displays supplier performance metrics by setting performance targets and tolerances.

This section provides an overview of metric display and discusses how to:

*   Define system targets and tolerances.

*   Define vendor-specific targets and tolerances.

Understanding Metric Display

This section discusses the appearance of the charts that display supplier metrics.

Graph Colors

The target and tolerance percentages that you enter on the metrics setup pages determine certain performance graph bar colors. Values that are:

- Equal to or greater than the target percentage are green (acceptable).

- Less than the target percentage but greater than the target percentage minus the tolerance percentage are yellow (warning).

- Less than this difference between the target percentage and the tolerance percentage are red (unacceptable).

Performance graph bars can also represent *particular* metric values; for example, the percentage of early shipments is expressed in blue on the On-Time Performance graph.

We use a PeopleTools 2D Bar chart type.

See *Enterprise PeopleTools PeopleBook: PeopleCode Language Reference*

Metrics

The system displays metrics against a specific target and tolerance for a particular vendor within a reporting entity if you define targets and tolerances on the Supplier Performance Vendor page. Otherwise, the system uses the general system-level targets and tolerances, which you define on the Supplier Performance Setup page.

Periods

The data (percentages) that appear are an aggregation of the items and units of measure for which receipts have been made. For each period shown, the user must navigate to view the underlying data that supports the chart.

The number of periods that appear is determined at the system level. The periods that appear in the performance detail pages (and their associated supplier pagelets) are based on the date ranges that the calendar ID that is associated with the reporting entity ID in PeopleSoft Purchasing defines.

See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Analyzing Procurement History," Defining Reporting Entities.

Pages Used to Define Supplier Performance Targets and Tolerances

Page Name	Definition Name	Navigation	Usage
Supplier Performance Setup	WV_PE_METRIC_SETUP	Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Supplier Performance Setup	Define system targets and tolerances for the Purchasing reporting entity.

Page Name	Definition Name	Navigation	Usage
Supplier Performance Vendor	WV_PE_METRIC_VNDR	Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Supplier Performance Vendor	Define vendor-specific targets and tolerances for a setID.

Defining System Targets and Tolerances

Access the Supplier Performance Setup page (Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Supplier Performance Setup).

To set up system targets and tolerances for the reporting entity:

1. Determine the reporting entity:

    Reporting Entity ID   Select to establish system targets and tolerances for this reporting entity. Define reporting entities on the Define Procurement Controls page in PeopleSoft Purchasing.

    See *PeopleSoft Enterprise Purchasing 9.1 PeopleBook*, "Analyzing Procurement History," Defining Reporting Entities.

2. Establish performance targets and tolerances (these metrics are expressed in percentages):

    On-Time Performance Target   The optimal percentage of on-time deliveries (quantity or receipts) for the given period.

    See Chapter 7, "Reviewing Supplier Performance," Viewing On-Time Performance Details, page 86.

    Quantity Performance Target   The optimal percentage of correct shipments in terms of quantity received versus scheduled quantity for the given period.

    See Chapter 7, "Reviewing Supplier Performance," Viewing Quantity Performance Details, page 89.

    Quality Performance Target   The optimal percentage of receipts that are received without being rejected due to quality for the given period.

    See Chapter 7, "Reviewing Supplier Performance," Viewing Quality Performance Details, page 90.

    PO/Receipt Qty Perf. Target (purchase order/receipt quantity performance target)   The optimal percentage of ordered versus received quantities for the given period.

    See Chapter 7, "Reviewing Supplier Performance," Viewing PO Versus Receipt Performance, page 91.

3. Set the chart and grid settings:

Number of Periods to Display	The number of periods that you want to appear in the graphical charts. The calendar definition determines a period's length.
Max Rows to Return (maximum rows to return)	The maximum number of rows that the system retrieves when the supplier selects detail for a period. This limits how much data the system retrieves to conserve web server resources.

4. Select early and late metric display settings.

    You can calculate early and late metrics in one of two ways:

Early/Late Metrics by Receipts	Bases the metric on the total number of receipts in relation to the schedule date. You may prefer this method when you want to measure timing of shipments regardless of quantity.
Early/Late Metrics by Quantity	Bases the metric on the aggregated receipt quantity in relation to the schedule date. You may prefer this method when you typically have several receipts for a given PO schedule line (versus the metric based on receipt count only).
	See Chapter 7, "Reviewing Supplier Performance," Understanding Supplier Performance Metrics, page 77.

Defining Vendor-Specific Targets and Tolerances

Access the Supplier Performance Vendor page (Set Up Financials/Supply Chain, Product Related, Procurement Options, Purchasing, Supplier Performance Vendor).

This page is nearly identical to the Supplier Performance Setup page with the exception that you are defining values for a specific vendor in a SetID rather than system-wide reporting entity values.

Viewing Supplier Performance Metrics

Your employees and your suppliers can access the supplier performance detail pages.

This section provides an overview of viewing supplier performance metrics, lists common elements, and discusses how to:

*   View on-time performance details.

*   View quantity performance details.

*   View quality performance details.

*   View PO versus receipt performance.

Understanding Viewing Supplier Performance Metrics

The internal-facing versions of the supplier performance detail pages are identical to the external-facing versions, with one exception: internal-facing pages include a SetID field with which internal users can access all vendors that are associated with the setID. However, vendors who use the external-facing pages can access only the vendors to whom you have granted them access. Vendors don't have access to the internal-facing detail pages.

Common Elements Used in This Section

Metric

Select *On-Time Performance, Quality Performance, Quantity Over/Under Performance,* or *PO/Receipt Qty Performance* (purchase order/receipt quality performance). Available options depend on whether the user has security for the pages.

Vendor

This field appears when the user is associated with more than one vendor. Internal users can select a vendor that is associated with the setID. The system displays only setID-vendor combinations for which there is data in the PRCR_ITEM_HST table.

Period/Year

Click a value to append complete procurement analysis data to the page that you are viewing. This summarizes the metrics for the item ID during the period.

See Viewing On-Time Performance Details for an example.

The periods that appear are based on the date ranges that the calendar ID that is associated with the report ID in PeopleSoft Purchasing defines.

When you select a period or year on a performance page, the system appends performance detail information and redisplays the page with the following information, which you can filter using several criteria.

From Percentage/To Percentage displays all items where the on-time, quantity, or quality percentage falls in a specific percentage range. Initially, From Percentage is set to *0,* and To Percentage is set to the target percentage for the metric.

If the from and to criteria don't return any data, the system changes the To Percentage to 100, and the system displays the selection again so that at least one row is returned in the grid.

If the from and to criteria return more rows than the Max Rows setting allows, the system displays an error message prompting the user to modify the from and to percentages to reduce the number of returned rows.

Performance Detail

Once you refresh a performance detail page, the system redisplays the page and adds further detail for the selected period. In particular:

Item ID and **Vendor Item ID**	Click a value to access the Review Receipts - Receipt Lines page, which displays individual receipt line details.
	Note. For the PO/Receipt metric, this link takes you to the Review Purchase Orders - Purchase Order List page; you can access the Receipt pages by drilling into the associated PO pages.
	See Chapter 6, "Reviewing Supplier Account Activity," Reviewing Receipts, page 69.
Ship To	The ship to business unit. Click a value to access the Ship To Details page.
Send Email	Click to send an email that includes links that external and internal users can click to return to the specific pages that they were viewing.
	Note. The web server must be configured for email.
	See Chapter 2, "Maintaining Vendor Information," Sending Email Messages, page 21.

Pages Used to View Supplier Performance Metrics

Page Name	*Definition Name*	*Navigation*	*Usage*
View Vendor Shipment Performance - On-Time Performance	WV_PE_METRIC_DTL	• Internal users: Purchasing, Analyze Procurement, Review Supplier Performance Select a setID, the appropriate metric, and vendor. • External users: Click the Detail link on the appropriate pagelet.	Track the percentage and actual number of shipments that are on time, early, and late for all items within the period.
View Vendor Shipment Performance - Quantity Performance	WV_PE_METRIC_DTL	See above.	Track the percentage and actual number of vendor shipments with correct quantities, over-shipment quantities, and under-shipment quantities by period.
View Vendor Shipment Performance - Quality Performance	WV_PE_METRIC_DTL	See above.	Track the percentage and actual number of vendor shipment quantities that are inspected, accepted, rejected, and returned by period.

Page Name	Definition Name	Navigation	Usage
View Vendor Shipment Performance - PO/Receipt Qty Performance	WV_PE_METRIC_DTL	See above.	Track the percentage and actual number of vendor shipment quantities that are inspected, accepted, rejected, and returned by period.
View Vendor Shipment Performance - Ship To Details	IN_SSQBALBUNIT_DET	Click a ship to business unit link on the Ship To/Category tab of any performance detail page.	View ship to details.
Email Message	WV_PE_EMAIL	Click the Send Email link on any performance detail page.	Send an email from within the detail page about the data that you or the supplier are reviewing.

Viewing On-Time Performance Details

Access the View Vendor Shipment Performance - On-Time Performance page (internal users - Purchasing, Analyze Procurement, Review Supplier Performance; external users - click the Detail link on the appropriate pagelet).
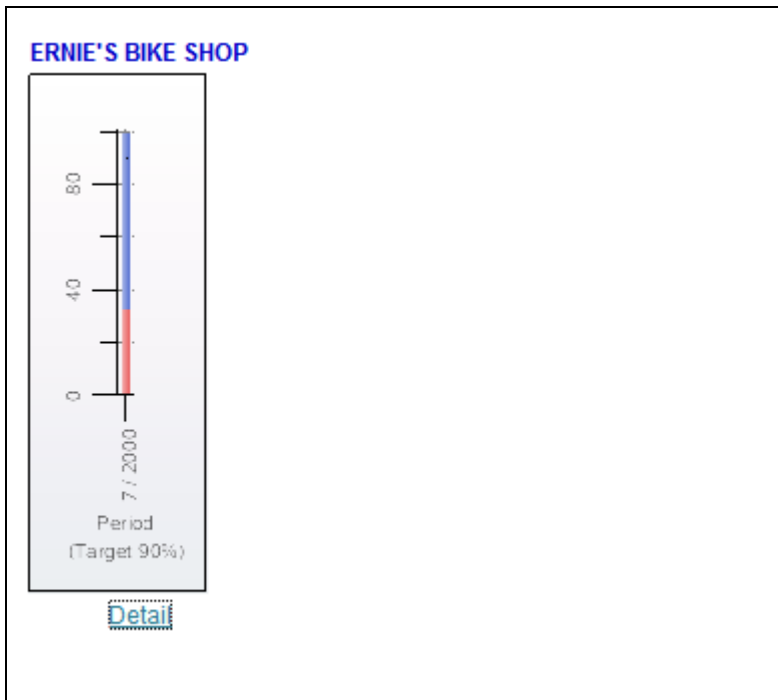
Example of the View Vendor Shipment Performance - On-Time Performance page before clicking the Period/Year link

Example of the appended Detail Information section after clicking the Period/Year link

The system displays on-time performance summary information. This table displays the equations that the system uses to derive this page's metric fields:

Metric Name	Equation Used to Derive Metric
% On Time	Depending on the early/late metric display setting that you select, the number of receipts minus early ships minus late ships divided by: The total number of receipts. The total receipt quantity.
% Early	Depending on the early/late metric display setting that you select, the early ships divided by: The total number of receipts. The total receipt quantity.
% Late	Depending on the early/late metric display setting that you select, the late ships divided by: The total number of receipts. The total receipt quantity.
	These columns appear when you select Early/Late Metrics by Receipts when setting system-wide or vendor-specific targets and tolerances.
Number of Receipts	Total number of receipts for a specific item and vendor for a period (includes all items).

Metric Name	Equation Used to Derive Metric
Early Ships	Number of receipts (by period) that are marked as received early. **Note.** A receipt is marked *early* when the receipt date from the receipt header is less than the due date from the PO schedule, minus the reject days from PURCH_ITEM_ATTRIB. Technically the system updates the PS_RECV_LN_SHIP.SHIP_DATE_STATUS field with the value *2*.
Late Ships	Number of receipts (by period) that are marked as received late. **Note.** A receipt is marked *late* when the receipt date from the receipt header is greater than the due date from the PO schedule, plus the reject days from PURCH_ITEM_ATTRIB. Technically the system updates the PS_RECV_LN_SHIP.SHIP_DATE_STATUS field with the value *3*.
	These columns appear when you select Early/Late Metrics by Quantity when setting system-wide or vendor-specific targets and tolerances:
Receipt Quantity	Total quantity received for a specific item and vendor for a period (includes all items).
Qty Early	Quantity received (by period) that is marked as received early. **Note.** A receipt is marked *early* when the receipt date from the receipt header is less than the due date from the PO schedule, minus the reject days from PURCH_ITEM_ATTRIB. Technically the system updates the PS_RECV_LN_SHIP.SHIP_DATE_STATUS field with the value *2*.

Metric Name	Equation Used to Derive Metric
Qty Late	Quantity received (by period) that is marked as received late. **Note.** A receipt is marked *late* when the receipt date from the receipt header is greater than the due date from the PO schedule, plus the reject days from PURCH_ITEM_ATTRIB. Technically the system updates the PS_RECV_LN_SHIP.SHIP_DATE_STATUS field with the value *3*.

See Also

Viewing Quantity Performance Details

Access the View Vendor Shipment Performance - Quantity Performance detail page (internal users - Purchasing, Analyze Procurement, Review Supplier Performance; external users - click the Detail link on the appropriate pagelet).

The system displays quantity performance summary information. This table displays the equations that the system uses to derive this page's metric fields:

Metric Name	Equation Used to Derive Metric
% Correct	Number of receipts minus overships minus underships divided by number of receipts.
% Over	Overships divided by number of receipts.
% Under	Underships divided by number of receipts.
Number of Receipts	Total number of receipts for a specific item and vendor for a period (includes all items).

Metric Name	Equation Used to Derive Metric
Over Ships	Number of receipts (by period) that are marked as over-received. **Note.** A receipt is marked *over-received* when the total quantity that is received for the PO schedule is greater than the PO quantity plus the receipt tolerance percent from PO_LINE_SHIP (obtained by default from PURCH_ITEM_BU or PURCH_ITEM_ATTRIB). Technically the system updates the PS_RECV_LN_SHIP.SHIP_QTY_STATUS field with the value *2*.
Under Ships	Number of receipts (by period) marked as under-received. **Note.** A receipt is marked as *under-received* when the total quantity that is received for the PO schedule is less than the PO quantity minus the receipt tolerance percent from PO_LINE_SHIP (obtained by default from PURCH_ITEM_BU or PURCH_ITEM_ATTRIB.) Technically the system updates the PS_RECV_LN_SHIP.SHIP_QTY_STATUS field with the value *3*.

See Also

Viewing Quality Performance Details

Access the View Vendor Shipment Performance - Quality Performance page (internal users - Purchasing, Analyze Procurement, Review Supplier Performance; external users - click the Detail link on the appropriate pagelet).

The system displays quality performance summary information. This table displays the equations that the system uses to derive this page's metric fields:

Metric Name	Equation Used to Derive Metric
% Reject	Rejected quantity divided by receipt quantity.
% Return	Returned quantity divided by receipt quantity.

Metric Name	Equation Used to Derive Metric
% Net Received	Receipt quantity minus rejected quantity minus returned quantity divided by receipt quantity.
% Defective	Rejected and returned quantities that you tag to be included in the quality metric (on the Return/Reject Reasons page in the Procurement Options menu).
Receipt Quantity	Sum of quantity that is received for all receipts for a specific item and vendor combination within a period.
Rejected Quantity	Sum of quantity that is rejected for all receipts for a specific item and vendor combination within a period.
Returned Quantity	Sum of quantity that is returned for all receipts for a specific item and vendor combination within a period.
Net Received Quantity	Receipt quantity minus rejected quantity minus returned quantity. This is a derived field and is not stored on any table within the system: it is available through the WV_PRCR_AAA_VW view.
Quantity Defective	Sum of rejected and returned quantities that you tag to be included in the quality metric (on the Return/Reject Reasons page in the Procurement Options menu).

Note. You can control at the setID level which return or reject reason codes are included in these equations.

See Also

Viewing PO Versus Receipt Performance

Access the View Vendor Shipment Performance - PO/Receipt Quantity Performance Detail page (internal users - Purchasing, Analyze Procurement, Review Supplier Performance; external users - click the Detail link on the appropriate pagelet).

The system displays quantity performance summary information based on the difference between the PO schedule quantities and the actual receipt quantities. This table displays the equations that the system uses to derive this page's metric fields:

Metric Name	Equation Used to Derive Metric
% Received	QTY_PO (quantity ordered) minus QTY_OPEN (quantity open), divided by QTY_PO-derived from the PRCR_ITEM_HST table.
PO Quantity	Quantity ordered (as shown on the PO schedules) for *x* period in the graph and *x* item (on PRCR_ITEM_HST). The particular period that shows the ordered quantity is based on the PO schedule due date.
Open Quantity	This is the nonreceived quantity of the ordered quantity that is stored on PRCR_ITEM_HST and is determined regardless of when the receipts were made. In other words, it was the quantity received or not. Therefore a PO schedule for 100 could be due in June, and there are receipts in July for 25 and August for 25. The PRCR_ITEM_HST table should show a line for June with a QTY_PO of 100 and QTY_OPEN of 50.

See Also

Chapter 8

Using PeopleSoft eSupplier Connection Pagelets

This chapter provides overviews of PeopleSoft eSupplier Connection pagelets and pagelets by role and discusses how to:

- Personalize supplier-facing pagelets.

- View supplier activities.

- View supplier performance.

Understanding PeopleSoft eSupplier Connection Pagelets

PeopleSoft eSupplier Connection provides portal pagelets for your corporate intranet or extranet home pages. These pagelets provide access to key data and transactions within PeopleSoft eSupplier Connection for use in supplier portal registries.

You and the suppliers can personalize the portal homepage by adding the pagelets that the suppliers need. Standards PeopleSoft role-based security ensures that users can access only the pagelets appropriate to their roles.

Suppliers can configure their portal home page with three narrow columns or one narrow and one wide column. Some pagelets have both a narrow and a wide version, each with its own object name. When you see two object names for a pagelet, the first one refers to the narrow version.

     Click to refresh the pagelet data.

     Click to customize the pagelet.

You can also design your own pagelets when your installation includes PeopleSoft Enterprise Portal.

See Also

PeopleSoft Enterprise Portal Solutions 9.1 PeopleBook: Enterprise Portal Pagelet Development

Pagelet Security

Similar to page access, you control pagelet security at the component level by associating it with a permission list (which is then associated with a role); each pagelet has its own component to enable more granular access. (You can ascertain a pagelet's component name in PeopleSoft Application Designer by searching for definition references to the page's system, or object, name.)

We group our pagelets into functional roles as an example of how to organize access. You need to create the proper permission lists and associate them with actual role definitions before your users can access them, or use the permission list definitions that we provide in our delivered sample data. We deliver sample data security objects (roles and permission lists) that you can use as an example of how to set up pagelet access.

Understanding Pagelets by Role

We provide these supplier-oriented role groupings as examples of how to organize pagelet access by function.

In this section, we organize supplier-facing pagelets by these sample roles:

- Supplier - Application Administrator.

- Supplier - Customer Service Rep (supplier-customer representative).

- Supplier - Production Manager.

- Supplier - Warehouse Personnel.

Based on your corporate needs and willingness to share information externally, carefully consider which data (applications) as well as pagelets you want to make available to your suppliers.

Note. The Supplier-External User role is associated with PeopleTools-related permissions that grant access to features such as personalization and navigation. This role (or one with similar permissions) must be present for any external-facing supplier user.

See Also

Supplier - Application Administrator Pagelets

The Supplier - Supplier Administrator is an external facing role that has access to the core set of PeopleSoft eSupplier Connection functions, as well as functions related to PeopleSoft Collaborative Supply Management and PeopleSoft Engineering. In addition, it enables the capability to create external users.

An internal or external user with the Supplier - Application Administrator role and its associated permissions can access all of these PeopleSoft eSupplier Connection product pagelets:

- On-Time Performance

- PO/Receipt Qty Performance (purchase order/receipt quantity performance)

- Quality Performance

- Quantity Performance

- Recent ASNs (recent advanced ship notices)

- Recently Dispatched POs (recently dispatched purchase orders)

- Recently Dispatched RFQs (recently dispatched request for quotes)

- Recently Dispatched Schedules

- Remaining Quantity Balances

Supplier - Customer Service Rep

The Supplier - Customer Service Rep role has general access to RFQ and Purchase order information including purchase order lookups, receipts, and purchase order acknowledgements in PeopleSoft eSupplier Connection.

An external user with this role and its associated permissions can access these PeopleSoft eSupplier Connection and Collaborative Supply Management pagelets:

- On-Time Performance

- PO/Receipt Qty Performance

- Quality Performance

- Quantity Performance

- Recently Dispatched POs

- Recently Dispatched RFQs

Supplier- Production Manager Role

The Supplier-Production Manager role is an external facing role that can access these PeopleSoft Collaborative Supply Management pagelets:

- Recently Dispatched Schedules.

- Remaining Quantity Balances.

Supplier - Warehouse Personnel

The Supplier-Warehouse Personnel role enables a user to create advanced ship notices (ASNs) during the shipment process. An external user with the Supplier - Warehouse Personnel role and its associated permissions can access the Recent ASNs pagelet.

Personalizing Supplier-Facing Pagelets

In this section, we discuss how to personalize supplier pagelet user defaults.

Note. Suppliers can personalize some of the supplier-facing pagelets.

Pages Used to Personalize Supplier-Facing Pagelets

Page Name	Definition Name	Navigation	Usage
<Pagelet Name> - Personalize User Defaults	WV_PE_USR_DEF	Click the Customize button on the following supplier-facing pagelets: On-Time Performance Quantity Performance Quality Performance PO/Receipt Qty Performance Recent ASNs Recently Dispatched POs Recently Dispatched RFQs Recently Dispatched Schedules Remaining Quantity Balances	Users associated with multiple vendor IDs can select a default vendor and where applicable, define the maximum number of retrieved records (rows) to display on the pagelet.
Personalize User Defaults - Save Confirmation	WV_PE_SAVE_CONFIRM	Click the Save button on the Personalize User Defaults page.	Confirm the changed user defaults.

Personalizing Supplier Pagelet User Defaults

Suppliers can select default vendors, and in some cases, the number of rows to display on a pagelet.

Note. Your system administrator can further control the content and appearance of the supplier performance pagelets at the reporting entity or vendor-setID level.

Select a default vendor (this option is only available when the user is associated with multiple vendor IDs).

If the pagelet displays transaction IDs, select the maximum number of records (rows) to appear on the pagelet.

Viewing Supplier Activities

This section discusses how the suppliers can view their associated vendor account activities and access the source application pages using these pagelets:

- Recently Dispatched POs

- Recently Dispatched RFQs

- Recent ASNs

- Recently Dispatched Schedules

- Remaining Quantity Balances

Pagelets Used to View Supplier Activities

This table provides details on supplier activity pagelets.

Pagelet Name	Roles	Audience	Usage	Enabling Applications
Recent ASNs (WV_PE_ASN_LIST)	Supplier - Applications Administrator, Supplier - Warehouse Personnel	Supplier	Displays shipment IDs from supplier-entered advance shipping notifications, shipping dates, and receipt lines.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing
Recently Dispatched POs (WV_PE_ORD_STAT)	Supplier - Applications Administrator, Supplier - Customer Service Rep	Supplier	Displays recent purchase orders, dates, status, and acknowledgement status.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing

Pagelet Name	Roles	Audience	Usage	Enabling Applications
Recently Dispatched RFQs (WV_PE_RFQ_PGLT)	Supplier - Applications Administrator, Supplier - Customer Service Rep	Supplier	Displays recently dispatched RFQs. You must first create RFQs in PeopleSoft Purchasing, and assign the RFQ to the vendor using the Dispatch Vendor List or the Item Supply Vendor List.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing
Recently Dispatched Schedules (WV_PE_DISP_SCHEDS)	Supplier- Applications Administrator, Supplier- Production Manager	Employee	Displays the most recently dispatched schedules.	Requires these products: PeopleSoft Collaborative Supply Management, PeopleSoft Inventory, and PeopleSoft Purchasing
Remaining Quantity Balances (WV_PE_QTY_BAL)	Supplier- Applications Administrator, Supplier- Production Manager	Employee	Displays the remaining quantities (and percentages) available, the quantity vendor-owned, and reorder point for consigned items.	Requires these products: PeopleSoft Collaborative Supply Management, PeopleSoft Inventory, and PeopleSoft Purchasing

Recently Dispatched POs Pagelet

Access the Recently Dispatched POs pagelet (click the Customize button on the Recently Dipatched PO supplier-facing pagelet).

ERNIE'S BIKE SHOP

PO ID	Dispatched Date/Time	Status	Acknowledge Status
0000000193	04/18/2006 5:24:35AM	Dispatched	New
0000000192	04/18/2006 5:24:21AM	Dispatched	New
0000000174	04/17/2006 5:13:23PM	Dispatched	New
0000000177	04/17/2006 5:09:42PM	Dispatched	New
0000000179	04/17/2006 5:08:09PM	Dispatched	New

Show all/Enhanced...   Show All Acknowledgements

Recently Dispatched POs

Displays recent purchase orders, dates, status, and acknowledgement status.

PO ID (purchase order ID)	Click a linked value to access the Purchase Order Details page.
Acknowledge Status	Click a linked value to access the Acknowledge Purchase Orders - Acknowledgement Details page and view or edit dispatched purchase order or online purchase order acknowledgements (POAs).
Show all/Enhanced	Click to access the purchase order Filter Options page and enter the criteria to search for purchase orders.
Show All Acknowledgements	Click to access the Acknowledge Purchase Orders - Search/Filter Acknowledgements page and search for specific POAs.

See Also

Chapter 4, "Acknowledging Purchase Orders Online," page 35

Chapter 6, "Reviewing Supplier Account Activity," Using the Purchase Order List, page 63

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Dispatching and Printing Purchase Orders"

Recently Dispatched RFQs Pagelet

Access the Recently Dispatched RFQs pagelet (click the Customize button on the Recently Dipatched RFQ supplier-facing pagelet).

Recently Dispatched RFQs

Displays recently dispatched RFQs. You must first create RFQs in PeopleSoft Purchasing, and assign the RFQ to the vendor using the Dispatch Vendor List or the Item Supply Vendor List.

RFQ ID	Click a linked RFQ ID value to access the Request For Quote List page.
DtTm Open (date and time open) and **DtTm Close** (date and time close)	The date and time when the RFQ becomes open or closed for vendor response.
Status	Displays the status of the RFQ. Statuses are: • *New:* The vendor has not entered a response. • *Partially Responded:* The vendor has responded to some but not all of the line items on the RFQ. • *Responded:* The vendor has responded to all of the RFQ's lines.
Show all/Enhanced	Click to access the Review Request for Quotes Filter Options page.

See Also

Chapter 3, "Maintaining RFQ Responses," page 23

PeopleSoft Enterprise Purchasing 9.1 PeopleBook, "Dispatching and Printing Purchase Orders"

Recent ASNs Pagelet

Access the Recent ASNs pagelet (click the Customize button on the Recent ASNs supplier-facing pagelet).

ERNIE'S BIKE SHOP

Shipment No	Ship Date		Receipt Lines
SHP-4404	01/17/2002		Receipt Lines
Show all/Enhanced...		Create ASN	

Recent ASNs

Displays shipment IDs from supplier-entered advance shipping notifications, shipping date, and receipt lines.

Shipment No (shipment number)	Click a linked value to access the ASN History - Line Details page.
Receipt Lines	Click a linked value to access the Review Receipts - Receipt Lines page.
Create ASN	Click a linked value to access the Advance Shipment Notification - Advance Shipment Creation page.

See Also

Chapter 5, "Creating Advanced Shipping Notices," Understanding Supplier ASNs, page 53

Chapter 6, "Reviewing Supplier Account Activity," Reviewing Receipts, page 69

Recently Dispatched Schedules Pagelet

Access the Recently Dispatched Schedules pagelet (click the Customize button on the Recently Dipatched Schedules supplier-facing pagelet).

This pagelet displays the most recently dispatched schedules.

Show all/Enhanced   Click to navigate to the Approve Schedules Filter Options page, and enter the
                               criteria to search for a schedule.

Note. Collaborative planning schedules use workflow to send scheduling task notification to the supplier.
Using the PeopleSoft Enterprise Portal Integrated Task List pagelet, a supplier receives task details by
clicking a link for a supplier schedule work item. This link takes the supplier directly to the supplier
workbench schedule/item list, where the supplier can then click an item to access the Item Summary page.
When satisfied with the schedule quantities, the supplier can approve the schedule.

See Also

PeopleSoft Enterprise Portal Solutions 9.1 PeopleBook: Enterprise Portal Application Technology

Remaining Quantity Balances Pagelet

Access the Remaining Quantity Balances pagelet (click the Customize button on the Remaining Quantity
Balances supplier-facing pagelet).

This pagelet displays the remaining quantities (and percentages) available, the quantity vendor-owned, and
reorder point for consigned items. The system first displays the items that are closest to their reorder points.

Note. If the homepage layout is three-column, this pagelet displays up to four graphs. A two-column layout
restricts the number of graphs that appear to one or two.

% Remaining (percent   Displays the percentage remaining, derived by this equation:
remaining)
                                  (quantity available − reorder point) / restock value x 100

                                  The restock value depends on the replenishment type used: *EOQ, Reorder Qty*
                                  (static reorder quantity) or *Min/Max* [the restock value equals (Max − reorder
                                  point)].

                                  If the restock value is set to *0,* then the percentage remaining is set to zero on the
                                  pagelet.

Show all/enhanced   Click to view the inventory quantity balances transaction using the PeopleSoft
                                  Collaborative Supply Management Quantity Details page.

Viewing Supplier Performance

This section discusses how the suppliers view performance metrics using these pagelets:

• On-Time Performance

• Quantity Performance

• Quality Performance

• PO/Receipt Qty Performance

You can also control the content and appearance of the performance pagelets at the reporting entity or vendor level.

See Also

Chapter 7, "Reviewing Supplier Performance," Defining Supplier Performance Targets and Tolerances, page 80

Chapter 7, "Reviewing Supplier Performance," Viewing Supplier Performance Metrics, page 83

Pagelets Used to View Supplier Performance

This table provides details on PeopleSoft eSupplier Connection pagelets.

Pagelet Name	Roles	Audience	Usage	Enabling Applications
On-Time Performance (WV_PE_METRIC_1)	Supplier - Applications Administrator, Supplier - Customer Service Rep	Supplier	Displays the percentage and actual number of shipments that are on time, early, and late for all items within the period.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing
PO/Receipt Qty Performance (WV_PE_METRIC_4)	Supplier - Applications Administrator, Supplier - Customer Service Rep	Supplier	Displays the percentage and actual number of vendor shipment quantities inspected, accepted, rejected, and returned by period.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing
Quality Performance (WV_PE_METRIC_2)	Supplier - Applications Administrator, Supplier - Customer Service Rep	Supplier	Displays the percentage and actual number of vendor shipment quantities inspected, accepted, rejected, and returned by period.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing

Pagelet Name	Roles	Audience	Usage	Enabling Applications
Quantity Performance (WV_PE_METRIC _3)	Supplier-Applications Administrator, Supplier-Customer Service Rep	Supplier	Displays the percentage and actual number of vendor shipments with correct quantities, over-shipment quantities, and under-shipment quantities by period.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing

On-Time Performance Pagelet

Access the On-Time Performance pagelet (click the Customize button on the On-Time Performance supplier-facing pagelet).
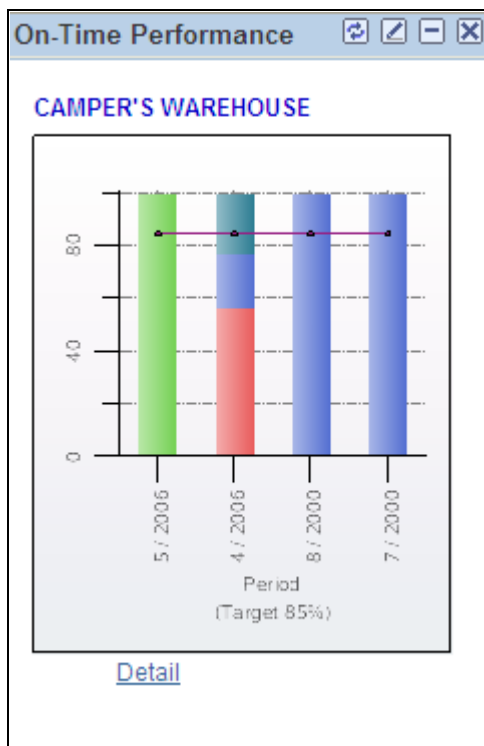
On-Time Performance pagelet

Displays the percentage and actual number of shipments that are on time, early, and late for all items within the period. The pagelet features a graph that displays the percentage on time metric, the vendor name, and target percentages by period.

Click the Detail link to access the On-Time Performance page, and view the metrics used to derive this graph.

See Also

Quantity Performance Pagelet

Access the Quantity Performance pagelet (click the Customize button on the Quantity Performance supplier-facing pagelet).
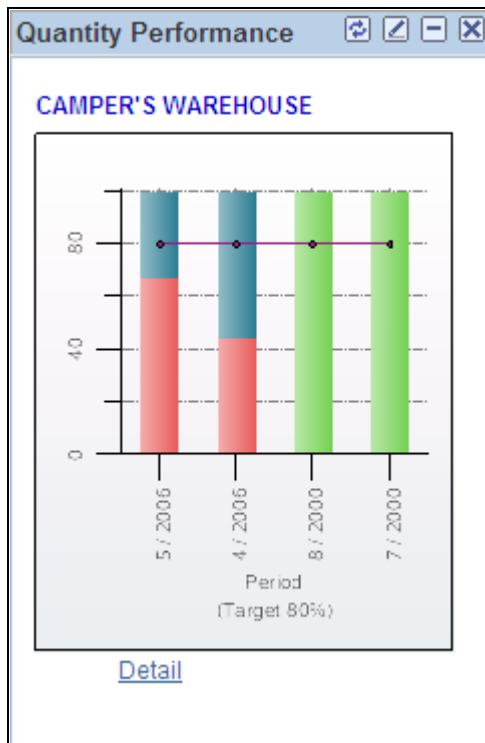
Quantity Performance pagelet

Displays the percentage and actual number of vendor shipments with correct quantities, over-shipment quantities, and under-shipment quantities by period. The pagelet features a graph that displays the vendor name, percentage correct, percentage under, percentage over, and target percentage.

Click the Detail link to access the Quantity Performance page, and view the metrics used to derive this graph.

See Also

Quality Performance Pagelet

Access the Quality Performance pagelet (click the Customize button on the Quality Performance supplier-facing pagelet).
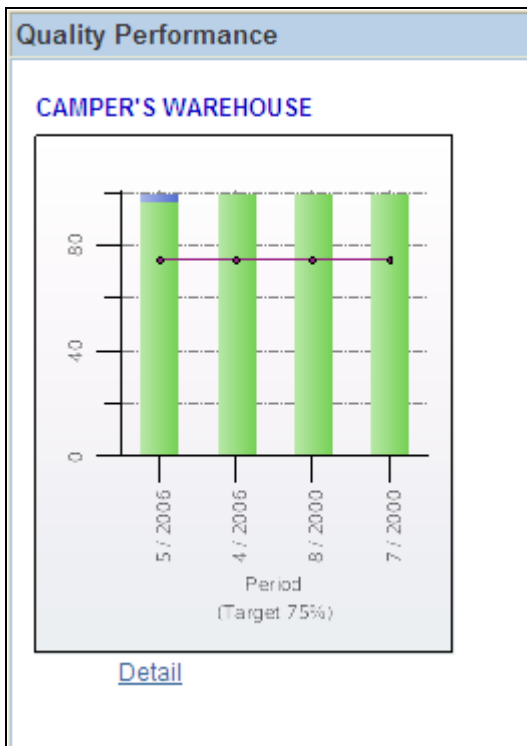
Quality Performance pagelet

Displays the percentage and actual number of vendor shipment quantities inspected, accepted, rejected, and returned by period. The pagelet features a quality performance graph that displays the percentage net received metric, vendor name, and target percentage.

Click the Detail link to access the Quantity Performance page, and view the metrics used to derive this graph.

See Also

Chapter 7, "Reviewing Supplier Performance," Viewing Quality Performance Details, page 90

PO/Receipt Quantity Performance Pagelet

Access the PO/Receipt Quantity Performance pagelet (click the Customize button on the PO/Receipt Quantity Performance supplier-facing pagelet).

Displays the percentage and actual number of vendor shipment quantities inspected, accepted, rejected, and returned by period. The pagelet features a purchase order-versus-receipt quantity performance graph that displays the percentage open receipt quantity metric, vendor name, and target percentage by period.

Click the Detail link to access the PO/Receipt Quantity Performance page, and view the metrics used to derive this graph.

See Also

Chapter 7, "Reviewing Supplier Performance," Viewing PO Versus Receipt Performance, page 91

Appendix A

Delivered Workflows for PeopleSoft eSupplier Connection

This appendix discusses delivered workflows for PeopleSoft eSupplier Connection.

See Also

Enterprise PeopleTools PeopleBook: Workflow Technology

Enterprise PeopleTools PeopleBook: Using PeopleSoft Applications

Delivered Workflows for PeopleSoft eSupplier Connection

This section discusses eSupplier Connection workflows. The workflows are listed alphabetically by workflow name.

PO RFQ Dispatch

The section discusses the PO RFQ Dispatch workflow.

Description

Event Description	An RFQ is dispatched.
Action Description	Worklist Notification to a supplier user related to the vendor/location of the RFQ who is linked to the role Supplier - Customer Service Rep when the RFQ is dispatched. **Note.** This is in addition to an email dispatch.
Notification Method	Worklist

Workflow Objects

Business Process	PO_RFQ_DISPATCH

| Activity | PO_RFQ_DISPATCH |
| Role | Supplier - Customer Service Rep |

Notify Vendor

The section discusses the Notify Vendor workflow.

Description

Event Description	A PO is dispatched.
Action Description	Notifies vendor of PO dispatch if dispatch method is email. A link is included for supplier to access PeopleSoft Purchasing.
Notification Method	Email

Workflow Objects

Business Process	PO_EMAIL_DISP
Activity	NOTIFY_VENDOR
Role	Vendor

PO Acknowledgement

The section discusses the PO Acknowledgement workflow.

Description

Event Description	A purchase order is changed or rejected by a supplier and needs buyer review. Event can be triggered from EDI or the Supplier Portal.
Action Description	This provides confirmation to the buyer that the vendor has received a purchase order and that the vendor is suggesting changes to the purchase order. The buyer is directed to the Purchase Order Acknowledgements page to review/approve the PO.
Notification Method	Worklist

Workflow Objects

| Business Process | PO_ACKNOWLEGEMENT |

Activity	PO_ACKNOWLEGEMENT
Role	Buyer

Index

O

on-time performance details 86
On-Time Performance pagelet 104
order summaries
    reviewing 68
    viewing change order information 69
    viewing schedule information 69

P

pagelet personalization 96
pagelets
    On-Time Performance 104
    PO/Receipt Qty Performance 106
    Quality Performance 105
    Quantity Performance 105
    Recent ASNs 101
    Recently Dispatched POs 98
    Recently Dispatched RFQs 99
pagelet types, supplier 93
pages, employee-facing
    used to maintain online POAs 47
pages, supplier-facing
    used to review order summaries 68
payments, reviewing 73
PeopleSoft Purchasing pagelets
    Recently Dispatched Schedules 101
    Remaining Quantity Balances 102
performance *See* supplier performance
performance metrics
    equations for determining 87, 89, 90, 91
    periods for determining 81, 84
    prerequisites 79
    targets and tolerances 80
    understanding 77
    viewing 83
performance metric types
    On-Time 78, 86
    PO/Received Quantity 79, 91
    Quality 79, 90
    Quantity 78, 89
periods 81, 84
permission lists 4
Personalize User Defaults - Save Confirmation page 96
Personalize User Defaults page 96
PO_SUPP_SETUP component 61
PO/Receipt Qty Performance pagelet 106
POAs
    acknowledgement details, viewing and changing 46
    creating online POAs 40
    recently dispatched 98
    reviewing and approving 49
    searching for 42, 48
    status, acknowledging 37
    understanding online POAs 35
PO versus receipt quantity performance details 91
prerequisites
    performance metrics 79
    security 4
printing, setting up supply side capability 59
processing, deferred x
purchase order acknowledgements *See* POAs

Purchase Order Acknowledgements page 108
Purchase Orders - Invoice Details page 63
Purchase Orders - Purchase Order Details page 62
Purchase Orders - Purchase Order List page 62
Purchase Orders - Purchase Order Schedule page 63
purchase orders, reviewing 61, 65

Q

quality performance details 90
Quality Performance pagelet 105
quantity performance details 89
Quantity Performance pagelet 105

R

receipts, reviewing 69, 70, 73
Recent ASNs pagelet 101
Recently Dispatched POs pagelet 98
Recently Dispatched RFQs
    pagelets 99
Recently Dispatched Schedules pagelet 101
Registration Setup page 13
Remaining Quantity Balances pagelet 102
reporting entities 82
Request for Quote History page 28, 32
Request For Quote Response page 27
Request for Quotes - Filter Options page 27, 28
Request for Quotes- Request for Quote Detail page 27
Request for Quotes - Request for Quote Details page 29
Request for Quotes - Request for Quote List page 27, 29
Request for Quotes - Request for Quote Response Page 29
Request for Quotes - Select Vendor page 27
requests for quotes *See* RFQs
response history, RFQs 32
Review Invoices - Filter Options page 71
Review Invoices - Invoice Details page 71, 72
Review Invoices - Invoice List page 71
Review Invoices - Payment Details page 71
Review Invoices - Purchase Order Lines page 71
Review Invoices - Purchase Order Schedule page 71
Review Invoices - Receipt Details page 72
Review Invoices - Receipt Lines page 71, 73
Review Invoices - Select Vendor page 71
Review Payments - Filter Options page 73
Review Payments - Payment Detail page 74
Review Payments - Payments Made page 73
Review Payments - Select Vendor page 73
Review Purchase Orders - Filter Options page 62
Review Purchase Orders - Purchase Order Details page 65
Review Purchase Orders - Select Vendor page 62
Review Receipts - Filter Options page 70
Review Receipts - Receipt Details page 70
Review Receipts - Receipt Lines page 70
Review Receipts - Select Vendor page 70
RFQs
    alerting vendors 24
    process flow 23

S

T

U

V

W