
PeopleSoft FSCM 9.2: eSupplier Connection

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PeopleSoft FSCM 9.2: eSupplier Connection
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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see [Configuring Context-Sensitive Help Using the Hosted Online Help Website](#).

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See [Configuring Context-Sensitive Help Using a Locally Installed Online Help Website](#).

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	Description
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
=>	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation

does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help
- Managing Hosted online help
- Managing locally installed PeopleSoft Online Help

PeopleSoft FSCM Related Links

[Oracle Help Center](#)

[Hosted Online Help](#)

[PeopleSoft Information Portal](#)

[My Oracle Support](#)

Financial and Supply Chain Management information for Search Framework search engine can be found in PeopleSoft Application Fundamentals documentation. For application specific information, see the "Understanding Search Pages within Components " (PeopleSoft FSCM 9.2: Application Fundamentals) topic.

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[PeopleSoft Business Process Maps \(Microsoft Visio format\)](#)

[PeopleSoft Spotlight Series](#)

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Send your suggestions to pssoft-infodev_us@oracle.com. Please include the applications update image or PeopleTools release that you're using.

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Chapter 1

Maintaining Supplier Information

Understanding Supplier 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 supplier 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.

Prospective suppliers can register online by invitation or by using a public URL, depending on the registration setup. Existing suppliers can use the supplier portal to add new supplier users. You can manage invitations and approvals through the Supplier Administration Center.

Related Links

"Understanding Supplier Maintenance" (PeopleSoft 9.2: Source to Settle Common Information)

"Understanding Online Supplier Registration" (PeopleSoft 9.2: Source to Settle Common Information)

"Understanding the Supplier Administration Center" (PeopleSoft 9.2: Source to Settle Common Information)

Prerequisites

Before suppliers can use PeopleSoft self-service transactions, they need access to the system. PeopleSoft self-service security enables supplier administrators to give their employees access to supplier self-service transactions. Before suppliers can self-register online, administrators must set up the online registration system, including system setup and registration templates. See "Setting Up the Online Registration System" (PeopleSoft 9.2: Source to Settle Common Information) and "Creating Templates for Online Registration" (PeopleSoft 9.2: Source to Settle Common Information).

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

Establishing Self-Service Security for Suppliers

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.

See also the product documentation for *PeopleTools: Workflow Technology* and *PeopleTools: Security Administration*.

Note: Your PeopleSoft users are internal, while your suppliers' 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 supplier data and control self-service transactions. This example of the Roles search page (PeopleTools >Security >Permissions & Roles >Roles) shows the sample roles that PeopleSoft provides for supplier-facing transactions.

Image: Roles search page (example)

This example illustrates the sample roles that PeopleSoft provides for supplier-facing transactions on the Roles search page.

Roles

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

▼ Search Criteria

Search by: Role Name begins with su

Disable Autocomplete Case Sensitive

Search
Advanced Search

Search Results

View All
First
1-21 of 21
Last

Role Name	Description
SUPERVISOR	SUPERVISOR
SUPPL_DATA_DESIGNER	Supplemental Data Designer
SUPPL_DATA_DEVELOPER	Supplemental Data Developer
Supervisor by Oprid Qry	Supervisor
Supplier Contract Agree Update	Sample - Supplier Cntrct Agree
Supplier Contract Clause Apprv	Sample - Supply Contract Apprv
Supplier Contract Hardware Appr	Sample - Supplier Cntrct Hrdw
Supplier Contract Interested	Sample - Supply Cntrct Intrest
Supplier Contract Librarian	Sample - Supplier Contract Lib
Supplier Cntrct 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

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 Applications 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 supplier access to PeopleSoft eSupplier Connection. Suppliers must first be assigned at least one supplier ID as part of user ID creation.

To set up external users, use the internal Supplier User pages (Suppliers, Supplier Setup/Maintenance, and Supplier 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 supplier ID.

External supplier administrators can:

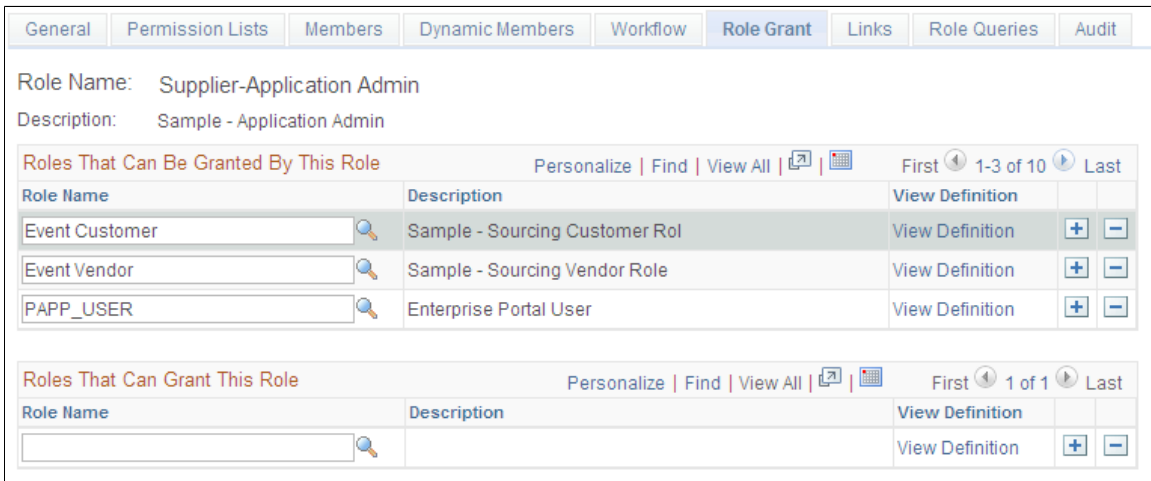
- Create and update users within the supplier ID to which they have access.
- Grant self-service transaction access to the supplier IDs to which they have administrative access.

You can assign a variety of roles to the suppliers' 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 (PeopleTools >Security >User Profiles >Roles >Role Grant).

This example illustrates how the page appears.

Image: Role Grant page (example)

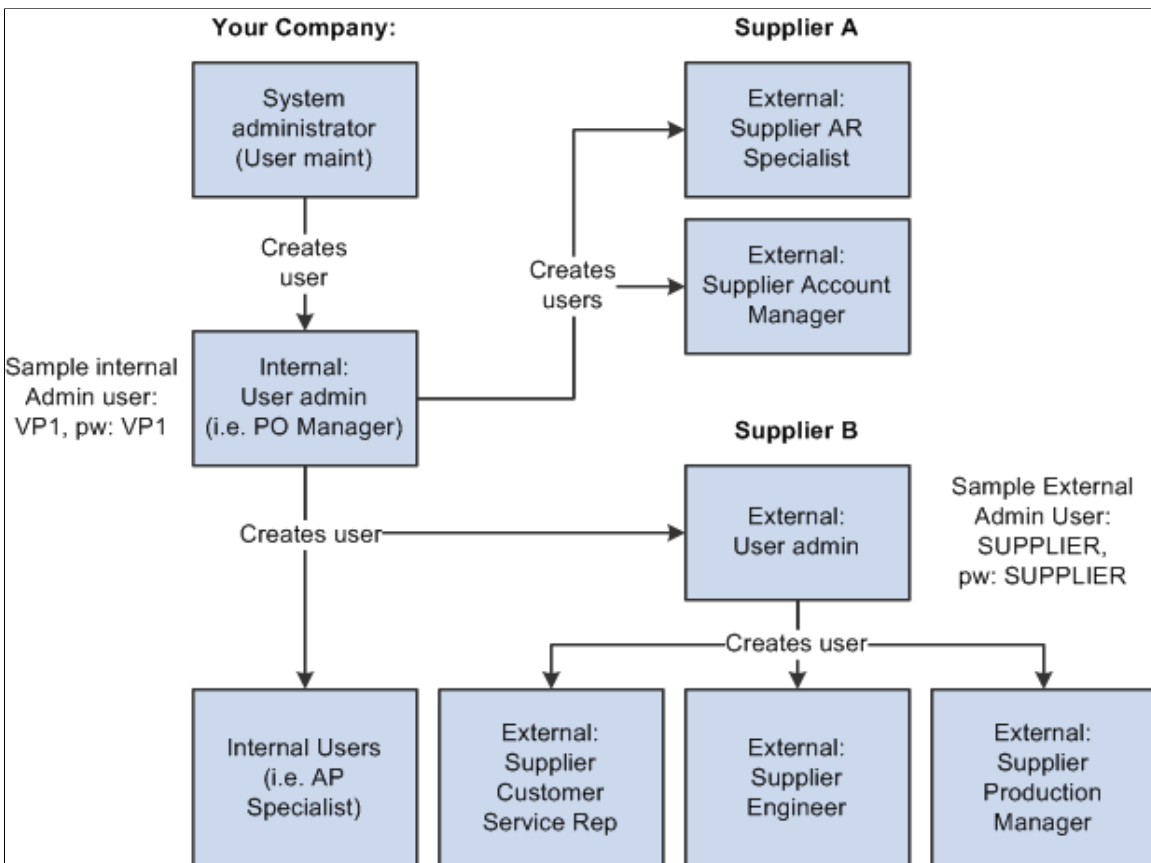
This example illustrates the fields and controls on the Role Grant page.



User Maintenance Example

Image: Internal and external 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.



Maintaining Users

To set up supplier users, use the Define Supplier User (UM_DISTR_INTVND) component.

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

Pages Used to Maintain Users

Page Name	Definition Name	Usage
Maintain Supplier Information - Setup User Page	UM_DISTR_VNDR_INT	Internal users with the Supplier Application Administrator role can create external administrators, give other internal users access to supplier IDs, and create or update suppliers' users.
Security - Setup User Page	UM_DISTR_VNDR_EXT	External supplier administrators can create and maintain their own supplier users and give them access to supplier data. Maintain Supplier Information - Setup User Page
Add Supplier Page	EXT_VND_SELECT	Suppliers can add new suppliers to be assigned to suppliers' users. Maintain Supplier Information - Setup User Page
Define Supplier User Page	VENDOR_USER	Associate users with suppliers.

Define Supplier User Page

Use the Define Supplier User page (VENDOR_USER) to associate users with suppliers.

Navigation

Internal Users: Suppliers > Supplier Information > Add/Update > Define Supplier User

Image: Define Supplier User page

This example illustrates the fields and controls on the Define Supplier User page. You can find definitions for the fields and controls later on this page.

Define Supplier User

Logon Information

User ID: SUPPLIER Account Locked Out?
(Click here to disable the access to the system for this user)

Description:

*Email ID:

*Operator Password (Encrypted):

*Confirm Password:

*Access Profile Symbolic Id:

Language Code:

Currency Code:

Rate Type:

User Roles

Role Name	Description		
<input type="text" value="EOPP_USER"/>	Common Portal User	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="PAPP_USER"/>	Enterprise Portal User	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Supplier-Application Admin"/>	Sample - Application Admin	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Supplier-Customer Service Rep"/>	Sample - Customer Service Rep	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Supplier-External Contracts"/>	Supplier-External Contracts	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="Supplier-External-User"/>	Sample - Required Supp Role	<input type="button" value="+"/>	<input type="button" value="-"/>

Supplier Access

SetID	Supplier ID	Supplier		
<input type="text" value="SHARE"/>	<input type="text" value="SCM0000004"/>	BERNIE'S BIKE SHOP	<input type="button" value="+"/>	<input type="button" value="-"/>

Bidder Access

*SetID	*Bidder ID	Bidder Name		
<input type="text" value=""/>	<input type="text" value=""/>		<input type="button" value="+"/>	<input type="button" value="-"/>

To set up supplier 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 the product documentation for *PeopleTools: 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 *Establishing Self-Service Security for Suppliers*.

See *Establishing Self-Service Security for Suppliers*.

3. Associate (existing) supplier IDs to the user. If suppliers have registered online, then supplier IDs are automatically associated to the user ID.

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

4. Associate bidder IDs to the user. Only the active bidder IDs are displayed for selection. Inactive or Unapproved bidders are not displayed.

To view the Bidder Access details, you need to select the Allow Supplier User to Access Multiple Suppliers and Bidders check box on the strategic sourcing installation.

Note: When you convert a bidder to a supplier or post award for events, the bidder ID is set to Inactive. This generates a new supplier ID. In such cases, the bidder is automatically removed from the Bidder Access grid. The corresponding supplier ID will be added to the Supplier Access table.

Maintain Supplier Information - Setup User Page

Use the Maintain Supplier Information - Setup User page for external users to associate user IDs with supplier codes.

Navigation

External users: Maintain Supplier Information > User Profiles

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

Related Links

[Establishing Self-Service Security for Suppliers](#)

Maintaining Supplier Address Information

This topic lists the pages used to maintain supplier address information.

Pages Used to Maintain Supplier Address Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Maintain Addresses - Select Supplier Page	PO_SS_VND_LIST	Suppliers select a supplier to navigate to its inquiry or maintenance pages. This page is available only if more than one supplier is associated with the user.
Maintain Addresses - Current Addresses Page	PO_SSVNDR_CURADDR	Suppliers access pages to view, add, or maintain address, email, and phone information.
Maintain Addresses - Address Information Page	PO_SSVNDR_ADDRDTL	Suppliers can view, add, or maintain address, email, and phone information. The fields on this page vary according to the country that is selected.
Maintain Addresses - Future Address Information Page	PO_SSVNDR_ADDRFDTL	Suppliers can review addresses that are not yet in effect and add or edit future addresses. The fields on this page vary according to the country that is selected.

Maintaining Supplier Contact Information

This topic lists the pages used to maintain supplier contact information.

Pages Used to Maintain Supplier Contact Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Maintain Contacts - Select Supplier Page	PO_SS_VND_LIST	Suppliers select a supplier to navigate to its inquiry or maintenance pages. This page is available only if more than one supplier is associated with the user.
Maintain Contacts - Current Contacts Page	PO_SSVNDR_CURCNTCT	Access pages to view, add, or maintain current contact information.
Maintain Contacts - Contact Information Page	PO_SSVNDR_CNTCTDTL	View, add, or maintain current contact information.
Maintain Contacts - Future Contacts Page	PO_SSVNDR_CNTFTDTL	View, add, or edit contacts to go into effect on a future date.

Sending Email Messages

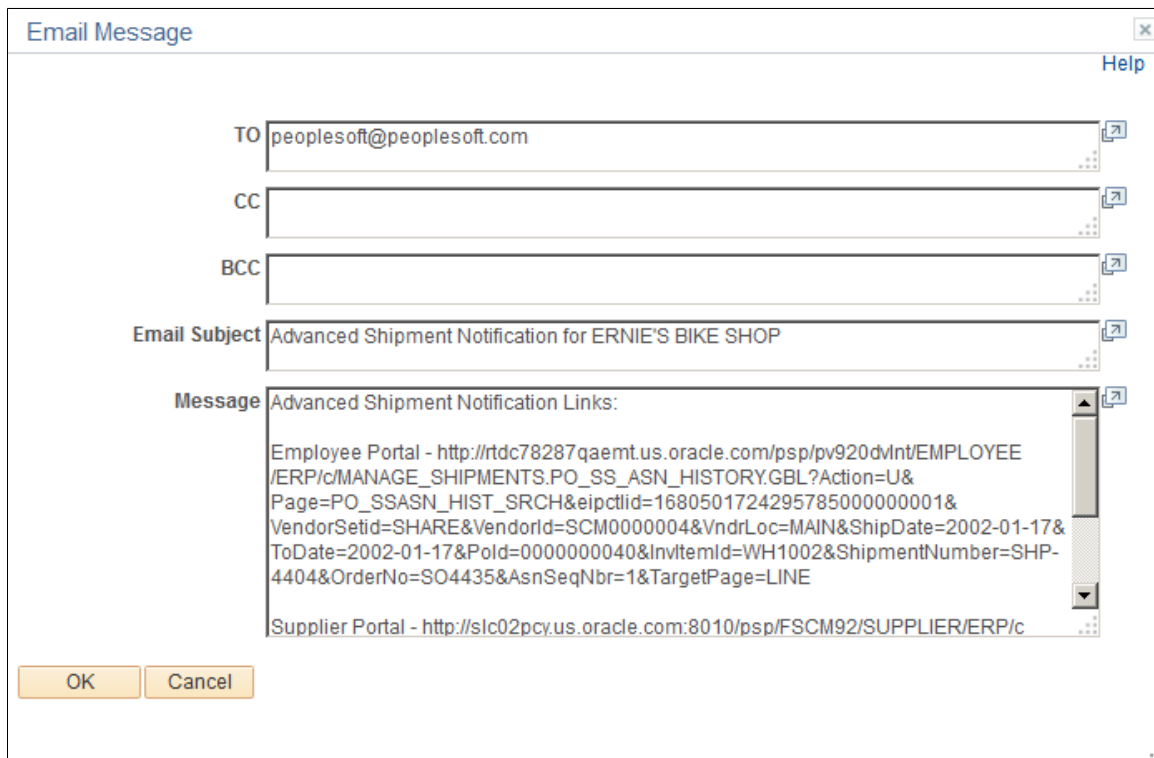
The Email Message page is accessible from several supplier- and employee-facing pages. Use the Email Message page (WV_PE_EMAIL_SP) to send an email that contains a link to the page from which the Email Message page was accessed.

The body of the message contains two URLs: one that an internal recipient uses to access the referenced page through the PeopleSoft Applications 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. Instead, the online registration system provides email templates for ongoing email communications to registrants at various stages of registration, including invitations, notifications of approved or rejected requests, requests for additional information to complete registration, notice of duplicate supplier identification or OFAC and options for proceeding, and reminders about pending requests in the system. See "Using Supplier Registration Email Templates" (PeopleSoft 9.2: Source to Settle Common Information).

Image: Example of the Email Message page

This example illustrates the fields and controls on the Email Message page. 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.



Chapter 2

Maintaining RFQ Responses

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 real-time 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 Supplier List or the Item Supply Supplier List to assign the RFQ to the supplier, and dispatch it to the supplier. When dispatching by email, the email includes a link which returns the supplier back to the RFQ to respond.

2. Alerts the supplier to the RFQ.

You can set up automatic workflow notification if your installation includes PeopleSoft Applications 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 supplier), and now the supplier can enter a new response to the RFQ.

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

See the product documentation for *PeopleSoft Purchasing*.

Common Elements Used in Maintaining RFQ Responses

Item ID and Supplier Item ID

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

Alerting Suppliers About Dispatched RFQs

You can alert suppliers by email (or, if your installation includes PeopleSoft Applications Portal, by a worklist item using the Tasks pagelet) that you have dispatched a new RFQ to them.

This section discusses how to:

- Automatically email RFQ alerts.
- Send workflow task list alerts.

See *PeopleSoft Portal Solutions* documentation, including Portal and Site Administration and Using Portal Features.

See also the product documentation for *PeopleTools: Workflow Technology* and *PeopleTools: Security Administration*.

Automatically Emailing RFQ Alerts

To set up automatic RFQ dispatch alert email messages 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 Supplier 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 Supplier 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 the product documentation for *PeopleSoft Purchasing*.

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 PeopleSoft Workflow to add a worklist item to the Tasks 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 Applications Portal and you have enabled the Integrated Task List feature.

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

Note: If you give suppliers the appropriate privileges, they can access action items or worklist items through PeopleTools.

Enabling Users to See Tasks for Specific Suppliers

To view action items or worklist items 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. Supplier.
 - b. Supplier_Loc (supplier location).
 - c. TableSet ID.

2. Admin Area PO includes Administrative Area.

Before a task appears on the Tasks 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.
- Supplier = VENDOR_ID.
- Supplier_Loc = VNDR_LOC of RFQ.

See [Delivered Workflows for PeopleSoft eSupplier Connection](#).

Note: The SetID, supplier, and supplier 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 action item lists.

Reviewing and Responding to RFQs

Pages Used to Review and Respond to RFQs

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Request for Quotes - Select Supplier Page	PO_SS_VND_LIST	Suppliers select a supplier to navigate to its RFQ inquiry pages. This page is available only if more than one supplier is associated with the user.
Request for Quotes - Filter Options Page	PO_SSSRCH_RFQ	Search for specific RFQs. This is the initial search page that the supplier sees when associated with only one supplier.
Request for Quotes - Request for Quote List Page	PO_SSRFQ_RESP_LINE	View general RFQ information and a list of items by RFQ to which to respond.
Request for Quotes - Request for Quote Details Page	PO_SSRFQ_LN	Review RFQ details for a specific item.
Billing Address Page	PO_SSSEC_BILL_ADDR	View billing address and telephone details. Request for Quotes - Request for Quote Details Page
Shipping Address Page	PO_SSSEC_SHIP_ADDR	View shipping address and telephone details. Request for Quotes - Request for Quote Details Page

Page Name	Definition Name	Usage
Request for Quotes - Request for Quote Response Page	PO_SSRFQ_RESP	View or respond to RFQs. This is the primary page that a supplier uses to respond to a specific RFQ item.
Email Message Page	WV_PE_EMAIL_SP	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 Quotes - Request for Quote Response Page
Request for Quote History Page	PO_SSRFQ_RESPONSE	View original RFQ details and supplier responses.

Request for Quotes - Filter Options Page

Use the Request for Quotes - Filter Options page (PO_SSSRCH_RFQ) to search for specific RFQs.

This is the initial search page that the supplier sees when associated with only one supplier.

Navigation

Process Quotes > Respond to Quote

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 "Dispatching RFQs" (PeopleSoft FSCM 9.2: Purchasing).

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.

Request for Quotes - Request for Quote List Page

Use the Request for Quotes - Request for Quote List page (PO_SSRFQ_RESP_LINE) to view general RFQ information and a list of items by RFQ to which to respond.

Navigation

- Click the Search button on the Request for Quotes - Filter Options page.
- Click an RFQ ID link on the Recently Dispatched RFQs pagelet.

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

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.

Request for Quotes - Request for Quote Details Page

Use the Request for Quotes - Request for Quote Detail page (PO_SSRFQ_LN) to review RFQ details for a specific item.

Navigation

Click an RFQ ID link 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 on the Billing Address page (PO_SSSEC_BILL_ADDR).

Ship To Location

Click to view specific shipping location and phone information on the Shipping Address page (PO_SSSEC_SHIP_ADDR).

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.

Request for Quotes - Request for Quote Response Page

Use the Request for Quotes - Request for Quote Response page (PO_SSRFQ_RESP) to view or respond to RFQs.

This is the primary page that a supplier uses to respond to a specific RFQ item.

Navigation

Click the New or Responded button on the Requests For Quote List page.

Image: Request For Quote Response page (1 of 2)

This example illustrates the fields and controls on the Request For Quote Response page (1 of 2).

The screenshot displays the 'Request For Quote Response' page for 'ERNIE'S BIKE SHOP'. The page is divided into two main sections. The top section contains RFQ header information: RFQ ID (0000000006), Line Number (1), Request Date (02/03/2003), RFQ Reference (PeopleSoft), Date Time Responded, Date RFQ Opened (02/03/2003 8:14AM), Date RFQ Closed, Buyer (CHRISBAKER), Contact (with a search icon), Salesperson (with a search icon), Supp Ref (with a search icon), Billing Location (USA - New York), and Payment Terms ID (30) with 'Net 30' text. The bottom section contains item details: Item ID (MT3000), Supplier Item ID (with a search icon), Description (Mountain Bike, Woman's), Quantity (100.0000), *Unit of Measure (EA) with 'Each' text and a search icon, Price (with a search icon), Currency Code (USD) with 'Dollar' text and a search icon, and Minimum Quantity (with a search icon).

Image: Request For Quote Response page (2 of 2)

This example illustrates the fields and controls on the Request For Quote Response page (2 of 2).

The screenshot displays the 'Request For Quote Response' page. At the top, there are several input fields: 'Schedule Date' (02/13/2004), 'Freight Terms Code' (Destination), 'Ship Via Code' (Common Carrier), 'Lead Time Days' (10), 'Manufacturer ID', 'Manufacturer's Item ID', and 'Supplier's Catalog'. The 'Ship To Location' is set to 'USA - New York'. Below these fields is an 'Attachments' section with a table containing two rows, each with a 'View' button. Underneath is a 'Buyer's Comments' section with a text area containing the comment 'Buyer Comment: Please respond with your best price and delivery' and a 'More Comments...' link. Below that is a 'Supplier's Header Comments' section with a text area, a 'Delete' button, and an 'Add Comments' button. At the bottom, there are buttons for 'Submit', 'Return to Request For Quote List', 'Send Email', and 'View History'. A note at the bottom left indicates '* Required Field'.

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.
Supplier Item ID	Suppliers can use this field to notify buyers of new or changed supplier item IDs.
	<hr/> Note: This does not automatically update the Supplier Item ID table in the PeopleSoft system. <hr/>
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 supplier 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 Sending Email Messages .

Request for Quote History Page

Use the Request for Quote History page (PO_SSRFQ_RESPONSE) to view original RFQ details and supplier responses.

Navigation

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.

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 supplier's response. (There can be multiple supplier 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.
Supplier's Header Comments	The supplier can enter multiple comments on the Request for Quote Response page (for each time the supplier 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 Supplier inquiry page in PeopleSoft Purchasing.

Related Links

"Inquiring and Reporting on RFQs and Supplier Responses" (PeopleSoft FSCM 9.2: Purchasing)

Acknowledging Purchase Orders Online

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 supplier location using the Procurement Options page in the Supplier component. When the system retrieves the settings, it first looks in the supplier 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 supplier.

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_ACKNOWLEDGEMENT; this adds worklist entries for the buyer user associated to the purchase order that link to the buyer side PO Acknowledgement page.

See [Delivered Workflows for PeopleSoft eSupplier Connection](#).

- 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 supplier 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 optionally perform a process to assist buyers when purchase orders have not been acknowledged by the supplier.

Use the Run Acknowledgement Alerts page (PO_POA_ALERTS) to 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.

Navigation

Purchasing > Purchase Orders > Acknowledgements > Run Acknowledgement Alerts > Run Acknowledgement Alerts

If the buyer specifies alert criteria for the purchasing business unit using the POA Settings page in the Processing Options component or for a supplier location using the Procurement Options page in the Supplier 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 supplier. EDX POAs use a similar approval flow as those submitted online.

See "Manage PO Acknowledgements - Header Page" (PeopleSoft FSCM 9.2: Purchasing).

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 redispached 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) <hr/> Note: Dispatch process moves the status because it was awaiting dispatch. <hr/>	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
Purchase order is redispached.	Dispatched	Acknowledged, with Changes (AC) <hr/> Note: Dispatch won't change status because not awaiting dispatch. <hr/>	New (change order 1) <hr/> Note: POA not required for this one, because this is actually the change order reflecting the changes that the supplier made above. <hr/>	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) <hr/> Note: POA required now, because it contains changes that are new to the supplier (that didn't come from the last round). <hr/>	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 topic discusses how the suppliers search and create POAs, view and change acknowledgement details.

Pages Used to Create Online POAs

Page Name	Definition Name	Usage
Acknowledge Purchase Orders - Select Supplier Page	WV_SS_VND_LIST	Suppliers select a supplier to navigate to its POA pages. Available only if more than one supplier is associated with the user.
<u>Acknowledge Purchase Orders - Search/Filter Acknowledgements Page</u>	PO_SS_POA_SEARCH	Search for dispatched purchase orders awaiting acknowledgement, or existing supplier-entered or EDX-submitted POAs. Also, view past POAs.
<u>Acknowledge Purchase Orders - Acknowledgement Summary Page</u>	PO_SS_POA_SUMMARY	Create new POAs, maintain existing POAs, or view accepted POAs. EDX POAs are shown in the results as information, but can not be changed online. (They can be seen in history as well.)
<u>Acknowledge Purchase Orders - Acknowledgement Details Page</u>	PO_SS_POA	View POA line details.
PO Changes - Details Page	PO_SSPOLNCHG_SP	Review the purchase order line changes for a selected purchase order line. <u>Acknowledge Purchase Orders - Acknowledgement Details Page</u>
Ship to Comments Page	PO_SS_SHIPCOMM_SP	Review Ship To comments or attachments for a selected purchase order schedule. This button only appears if there are Ship To comments. <u>Acknowledge Purchase Orders - Acknowledgement Details Page</u>
Acknowledge Purchase Orders - Acknowledgement Summary - History Page	PO_SS_POA_SUMMARY	View the history of a POA. <u>Acknowledge Purchase Orders - Acknowledgement Summary Page</u>

Acknowledge Purchase Orders - Search/Filter Acknowledgements Page

Use the Acknowledge Purchase Orders - Search/Filter Acknowledgements page (PO_SS_POA_SEARCH) to search for dispatched purchase orders awaiting acknowledgement, or existing supplier-entered or EDX-submitted POAs.

Also, view past POAs.

Navigation

- Manage Orders > Acknowledge Purchase Orders. Optionally select a supplier on the Acknowledge Purchase Orders - Select Supplier page.
- Click the Show All Acknowledgements link on the Recently Dispatched POs pagelet.

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

See [Manage PO Acknowledgements Page](#).

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 <i>New/Supplier Review</i> and <i>Supplier Respond/Buyer Accepted</i> . See POA Status .
View History	Select this option to display the supplier responded history for past POAs. Click a linked purchase order number value in history mode to view the history of a POA on the Acknowledge Purchase Orders - Acknowledgement Summary - History page (PO_SS_POA_SUMMARY).
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 <i>12, 25, 50, 100</i> , or <i>All</i> . 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 <i>Online</i> or <i>EDX</i> . 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 "Using Purchase Order Acknowledgements" (PeopleSoft FSCM 9.2: Purchasing).

See "Manage PO Acknowledgements - Header Page" (PeopleSoft FSCM 9.2: Purchasing).

Acknowledge Purchase Orders - Acknowledgement Summary Page

Use the Acknowledge Purchase Orders - Acknowledgement Summary page (PO_SS_POA_SUMMARY) to create new POAs, maintain existing POAs, or view accepted POAs.

Navigation

- 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.

Image: Acknowledge Purchase Orders - Acknowledgement Summary page

This example illustrates the fields and controls on the Acknowledge Purchase Orders - Acknowledgement Summary page. You can find definitions for the fields and controls later on this page.

Manage PO Acknowledgements
Acknowledgement Summary

PO Number 0000000239 PO Date 04/02/2012
 Acknowledgement Status New Acknowledge Date
 POA Response Accepted Reset to PO Values Reject All

PO Header Detail

Contact
 Currency Code US Dollar Payment Terms Net 30
 Rate Type Current Rate
 Reference Information
 Supplier SCM0000001 BIKE SHOP

Standard BU Comments
 Please notify us of the carrier locations.
 Click on the purchase order line number to see more details and to make any modifications.

POA Lines Personalize | Find | View All | First 1-2 of 2 Last

Line	Item ID	Description	PO Qty	Acknowledge Quantity	UOM	POA Response
1	10074	Classic 9820 Compass	10.0000	10.0000	EA	Accepted
2	10075	Nextstar Outback Compass, Digital	10.0000	10.0000	EA	Accepted

Comments
Save Save & Approve Return for Supplier Review Run PO Auto Change

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

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 "Manage PO Acknowledgements - Header Page" (PeopleSoft FSCM 9.2: Purchasing).

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 <i>Supplier Review</i> . This will indicate to the system that this POA is in process and still under review.
Save & Send Acknowledgement	<p>Click this button to save any changes and:</p> <ul style="list-style-type: none"> • Change the POA mode for the supplier from editable to view-only. • Set the acknowledgement status to <i>Buyer Accepted</i> 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 <i>Supplier Responded</i> if there are changes the buyer needs to approve. <p>If workflow is enabled, this also sends notification to the buyer for the POA with changes needing review.</p> <ul style="list-style-type: none"> • 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.

Related Links

[Sending Email Messages](#)

Acknowledge Purchase Orders - Acknowledgement Details Page

Use the Acknowledge Purchase Orders - Acknowledgement Details page (PO_SS_POA) to view POA line details.

Navigation

Click a line number link on the Acknowledge Purchase Orders - Acknowledgement Summary page.

Image: Acknowledge Purchase Orders - Acknowledgement Details page

This example illustrates the fields and controls on the Acknowledge Purchase Orders - Acknowledgement Details page. You can find definitions for the fields and controls later on this page.

Acknowledgement Details
ERNIE'S BIKE SHOP

Item Detail Find | View All First 1 of 1 Last

Line Number 1 Reset Item to PO values Reject Item

Unit of Measure Each Item Response Accepted

Item ID SUBCN-PAINT&INSP Supplier Item ID

Description Production Subcontracted Paint Extension

[More Item Details](#)

Schedules Personalize | Find | View All | First 1 of 1 Last

Order Sched	Sched	Order Due Date	Order Due Time	Order Quantity	Acknowledge Due Date	Acknowledge Quantity	POA Status	Split Line
1	1	04/21/2006	3:00:00PM	100.0000	04/21/2006 <input type="checkbox"/>	100.0000		

Return

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 Acknowledge 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.



Click the Split Line icon to split the schedule if the scheduled quantity is to be back-ordered 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 on the Ship to Comments page (PO_SS_SHIPCOMM_SP). 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.

This button only appears if there are Ship To comments.

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.

Pages Used to Review and Approve Online POAs

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Manage PO Acknowledgements Page</u>	PO_SS_POA_SEARCH	Buyers can search for online POAs and POAs received using EDX.
<u>Manage PO Acknowledgements - Acknowledgement Summary Page</u>	PO_SS_POA_SUMMARY	Use to view the acknowledgement information for the selected purchase order.
<u>Acknowledge Purchase Orders - Acknowledgement Details Page</u>	PO_SS_POA	Review and approve supplier-entered POAs.
Run Acknowledgement Alerts Page	PO_POA_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.
Run PO AutoChange Page	RUN_PO_AUTOCHNG	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.

Manage PO Acknowledgements Page

Use the Manage PO Acknowledgements page (PO_SS_POA_SEARCH) to search for online POAs and POAs received using EDX. (Buyers)

Navigation

Purchasing > Purchase Orders > Acknowledgements > Manage PO Acknowledgements

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

Supplier SetID and Supplier ID	The buyer can search for a supplier 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 <i>Supplier Review</i> .

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.
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Processed	Indicates whether the (changed) POA has been included in a Load Change Request process run.
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Related Links

[Acknowledge Purchase Orders - Search/Filter Acknowledgements Page](#)

Manage PO Acknowledgements - Acknowledgement Summary Page

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 "Manage PO Acknowledgements - Header Page" (PeopleSoft FSCM 9.2: Purchasing).

Use the Manage PO Acknowledgements - Acknowledgement Summary page (PO_SS_POA_SUMMARY) to view the acknowledgement information for the selected online purchase order.

Navigation

Purchasing > Purchase Orders > Acknowledgements > Manage PO Acknowledgements

Click a linked purchase order number on the Manage PO Acknowledgements search page.

Image: Manage PO Acknowledgements - Acknowledgement Summary page

This example illustrates the fields and controls on the Manage PO Acknowledgements - Acknowledgement Summary page. You can find definitions for the fields and controls later on this page.

Manage PO Acknowledgements

Acknowledgement Summary

PO Number 0000000252 PO Date 11/15/2012
 Acknowledgement Status New Acknowledge Date
 POA Response Accepted Reset to PO Values Reject All

PO Header Detail

Standard BU Comments

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

POA Lines Personalize | Find | View All | Print | First 1-5 of 5 Last

Line	Item ID	Description	PO Qty	Acknowledge Quantity	UOM	POA Response
1	ACTY	Actual Costed Item with WriteOff	10.0000	10.0000	EA	Accepted
2	ACTN	Actual Costed Item with Write-Off Unchecked	10.0000	10.0000	EA	Accepted
3	PERPAVG	Perpetual Average Costed Item	10.0000	10.0000	EA	Accepted
4	PERIODAVG	Periodic Average Costed Item	10.0000	10.0000	EA	Accepted
5	RETA/G	Retroactive Perpetual Average Costed Item	10.0000	10.0000	EA	Accepted

Comments

Save Save & Approve Return for Supplier Review Run PO Auto Change

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

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 [Creating Online POAs \(Suppliers\)](#).

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 "Using Purchase Order Acknowledgements" (PeopleSoft FSCM 9.2: Purchasing).

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)

Pages Used to Respond on Behalf of the Supplier

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Manage PO Acknowledgements Page	PO_SS_POA_SEARCH	Buyers can search for online POAs and POAs received using EDX.
Acknowledge Purchase Orders - Acknowledgement Summary Page	PO_SS_POA_SUMMARY	Use to view the acknowledgement information for the selected purchase order.
Acknowledge Purchase Orders - Acknowledgement Details Page	PO_SS_POA	Review and approve supplier-entered POAs.

Manage PO Acknowledgements Page

Buyers can use the Manage PO Acknowledgements page (PO_SS_POA_SEARCH) to accept and create acknowledgements for the supplier against a purchase order. For example, the supplier called a buyer with changes and the buyer wants to log them as acknowledgements.

Navigation

Purchasing > Purchase Orders > Acknowledgements > Manage PO 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.

See [Reviewing and Approving Online POAs \(Buyers\)](#).

Creating Advanced Shipping Notices

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 enable 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 communicate 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 submit 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.

Related Links

[Understanding PeopleSoft eSupplier Connection Pagelets](#)

"Using ASRs" (PeopleSoft FSCM 9.2: Purchasing)

"Loading Receipts Received Using EIPs and EDC" (PeopleSoft FSCM 9.2: Purchasing)

Creating Supplier ASNs

This topic discusses how to create supplier ASNs.

Pages Used to Create Supplier ASNs

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Advance Shipment Notification - Select Supplier Page	PO_SS_VND_LIST	Suppliers select a supplier to navigate to its ASN creation pages. This page is available only if more than one supplier is associated with the user, and if the user uses the menu to log on.
Advance Shipment Notification - Advance Shipment Creation Page	PO_SSASN_CREATION	Create supplier ASNs.
Advance Shipment Notification - Purchase Order Schedule Selection Page	PO_SSASN_SHIPMENTS	Select PO lines and schedules for ASNs. Advance Shipment Notification - Advance Shipment Creation Page
Advance Shipment Notification - Lot/Serial Information (inquiry) Page	PO_SSASN_LOTSERIAL	Assign lot IDs or serial IDs to selected item IDs. Advance Shipment Notification - Advance Shipment Creation Page

Advance Shipment Notification - Advance Shipment Creation Page

Use the Advance Shipment Notification - Advance Shipment Creation page (PO_SSASN_CREATION) to create supplier ASNs.

Navigation

Manage Orders > Create ASNs

Click the Create ASNs link on the Recent ASNs pagelet.

Use the Advance Shipment Notification - Purchase Order Schedule Selection page (PO_SSASN_SHIPMENTS) to select PO lines and schedules for ASNs.

Navigation

Enter a shipment number on the Advance Shipment Creation page, and click the Add Lines button.

Use the Advance Shipment Notification - Lot/Serial Information (inquiry) page (PO_SSASN_LOTSERIAL) to assign lot IDs or serial IDs to selected item IDs.

Navigation

Select a lot- or serial-controlled item, and click the Lot/Serial link on the Advance Shipment Creation page.

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 supplier location if the supplier is associated to more than one (if not, the location appears by default), a purchase order number, and an item ID or supplier 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 or more resulting PO Schedule lines to indicate the line is to be 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 supplier 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 supplier UOM. If the ERS Action on the PO Matching page is set to Yes, the system requires an invoice ID from 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 [Understanding Supplier ASNs](#).

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

Pages Used to Review ASN History By Suppliers

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
ASN History - Select Supplier Page	PO_SS_ASN_VND_LIST	Suppliers select a supplier to navigate to its ASN inquiry pages. This page is available only if more than one supplier is associated with the user.
ASN History - Filter Options Page	PO_SSASN_HIST_SRCH	Suppliers search for specific ASNs.

Page Name	Definition Name	Usage
ASN History - Summary Page	PO_SSASN_HDRHIST	Suppliers and employees view purchase order and shipment information for supplier ASNs.
ASN History - Line Details Page	PO_SSASN_LNHIST	Suppliers and employees view line details for selected shipments.
Advance Shipment Notification - Lot/Serial Information (inquiry) Page	PO_SSASN_LOTSERIAL	View lot or serial information for selected items.
Email Message Page	WV_PE_EMAIL_SP	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.

Related Links

"Using ASRs" (PeopleSoft FSCM 9.2: Purchasing)

Reviewing ASN History By Employees

Employees should navigate to these pages on the EMPLOYEE portal.

Pages Used to Review ASN History By Employees

Page Name	Definition Name	Usage
ASN History - Filter Options Page	PO_SSASN_HISE_SRCH	Employees search for supplier ASNs.
ASN History - Summary Page	PO_SSASN_HDRHIST	View purchase order and shipment information for the supplier ASN. Suppliers also use this page.
ASN History - Line Details Page	PO_SSASN_LNHIST	View line details for selected shipments. Suppliers also use this page.
Advance Shipment Notification - Lot/Serial Information (inquiry) Page	PO_SSASN_LOTSERIAL	View lot or serial information for selected items.
Email Message Page	WV_PE_EMAIL_SP	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.

Related Links

"Using ASRs" (PeopleSoft FSCM 9.2: Purchasing)

Chapter 5

Reviewing Supplier Account Activity

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 Reviewing Supplier Account Activity

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

Pages Used to Set Up Supply Side Print Capability

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Permission Lists - Process Page	ACL_PROCESS	Set the attributes and system defaults.

Page Name	Definition Name	Usage
Permission Lists - Permission Page	ACL_PROCESS_GROUPS	Specify to what capacity a user, or Role, can modify certain Process Scheduler settings. Permission Lists - Process Page
User Profile Page	USER_GENERAL	Set general user profile attributes.
Configure External Access Page	PO_SUPP_SETUP	Make the View PDF/Print option available to suppliers and indicate the default server.

Permission Lists - Process Page

Use the Permission Lists - Process page (ACL_PROCESS) to set the attributes and system defaults.

Navigation

PeopleTools > Security > Permissions & Roles > Permission Lists >Process

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.

Use the Permission Lists - Permission page (ACL_PROCESS_GROUPS) to specify to what capacity a user, or Role, can modify certain Process Scheduler settings.

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 (USER_GENERAL) 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 Supplier 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 Supplier User page can automatically enable printing for new users.

Configure External Access Page

Use the Configure External Access page (PO_SUPP_SETUP) to make the View PDF/Print option available to suppliers and indicate the default server.

Navigation

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. Oracle recommends trying the Report Repository method first and migrating to REN server technology if needed.

Reviewing POs

Pages Used to Review POs

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Purchase Orders - Select Supplier Page	PO_SS_VND_LIST	Suppliers select a supplier to navigate to its PO inquiry pages. This page is available only if more than one supplier is associated with the user.
Purchase Orders - Filter Options Page	PO_SSSRCH_POS	Search for POs.
<u>Purchase Orders - Purchase Order List Page</u>	PO_SSPOLST	View general PO information and select from the list of available POs for greater detail.

Page Name	Definition Name	Usage
Purchase Orders - Download Purchase Orders Page	PO_SSPO_DOWNLOAD	Use to determine which columns you want to include when downloading purchase order information to an excel spreadsheet. Purchase Orders - Purchase Order List Page
Purchase Orders - Purchase Order Details Page	PO_SSPO_DETAILS	Review line item details and access invoices that are related to a selected PO.
Purchase Orders - Purchase Order History Page	PO_SS_POHIST_SP	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. Purchase Orders - Purchase Order Details Page
PO Changes - Details Page	PO_SSPOLNCHG_SP	View the line and schedule changes for a purchase order change order. Purchase Orders - Purchase Order Details Page
Purchase Orders - Line Comments Page	PO_SS_LNCOMM_SP	Review line comments or attachments for a selected purchase order line. Purchase Orders - Purchase Order Details Page
Purchase Orders - Purchase Order Schedule Page	PO_SSPO_SCHEDULE	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 - Purchase Order Details Page
Purchase Orders - Receipt Lines Page	PO_SSRECV_LINES	View lines received against the purchase order schedule. Purchase Orders - Purchase Order Details Page
Purchase Orders - Ship to Comments Page	PO_SS_SHIPCOMM_SP	Review Ship To comments or attachments for a selected purchase order schedule. Purchase Orders - Purchase Order Details Page

Page Name	Definition Name	Usage
Purchase Orders - Invoice Details Page	PO_SSINVC_LINES	This page is a duplicate of the Review Invoices - Invoice Details page. Purchase Orders - Purchase Order Details Page

Purchase Orders - Purchase Order List Page

Use the Purchase Orders - Purchase Order List page (PO_SSPOLST) to view general PO information and select from the list of available POs for greater detail.

Navigation

Manage Orders > Purchase Orders

Enter selection criteria and click the Search button on the Review Purchase Orders - Filter Options page.

Image: Purchase Orders - Purchase Order List page

This example illustrates the fields and controls on the Purchase Orders - Purchase Order List page. You can find definitions for the fields and controls later on this page.

Purchase Orders
Purchase Order List

BIKE SHOP
POs Returned 30
Default View for Change Orders All lines

Set filter options Return To Vendor (Supplier) List Orders Per Page 012 First 1 to 12 of 30 Last

Purchase Order	Status	Last Dispatched Date/Time	Lines	Total Amount	Acknowledge Status	
<input type="checkbox"/> 0000000247	Dispatched	08/28/2012 10:10:15AM	1	975.00 USD	New	Create ASN View PDF
<input type="checkbox"/> 0000000239	Dispatched	08/28/2012 9:43:19AM	2	350.00 USD	New	Create ASN View PDF
<input type="checkbox"/> 0000000227	Dispatched	08/21/2009 9:02:46AM	1	44,000.00 USD	New	Create ASN View PDF
<input type="checkbox"/> 0000000226	Dispatched	08/21/2009 9:01:45AM	2	55,000.00 USD	New	Create ASN View PDF
<input type="checkbox"/> 0000000225	Dispatched	08/21/2009 8:50:50AM	1	110,000.00 USD	New	Create ASN View PDF
<input type="checkbox"/> 0000000224	Dispatched	08/21/2009 8:48:14AM	1	110,000.00 USD	New	Create ASN View PDF
<input type="checkbox"/> 0000000166	Dispatched	04/12/2006 2:28:37PM	2	2,450.00 USD	New	Create ASN View PDF
<input type="checkbox"/> 0000000148	Dispatched	04/06/2006 10:07:10AM	1	1,400.00 USD	New	Create ASN View PDF
<input type="checkbox"/> INV	Dispatched	05/09/2005 8:59:48AM	1	500.00 USD	New	Create ASN View PDF
<input type="checkbox"/> 0000000091	Dispatched	05/09/2005 8:59:48AM	2	104,000.00 USD	New	Create ASN View PDF
<input type="checkbox"/> 0000000062	Dispatched	05/09/2005 8:59:48AM	5	5,305.00 USD	New	Create ASN View PDF
<input type="checkbox"/> 0000000058	Dispatched	08/12/2003 12:16:30PM	2	78,816.18 USD	New	Create ASN View PDF

Select All Clear All
View Selected POs in Downloadable Format

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

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 as needed to enhance performance. The default value for the field is set using PeopleSoft eSupplier Connection installation options. You can change the value to <i>12, 25, 50, 100, or All</i> . 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.
--------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------

Related Links

[Configure External Access Page](#)

"Defining Purchasing Item Attributes" (PeopleSoft FSCM 9.2: Purchasing)

Purchase Orders - Purchase Order Details Page

Use the Purchase Orders - Purchase Order Details page (PO_SSPO_DETAILS) to review line item details and access invoices that are related to a selected PO.

Navigation

- Click a PO number link on the Purchase Order List page.
- Click a PO ID link on the Recent Purchase Orders pagelet.

Image: Purchase Orders - Purchase Order Details page

This example illustrates the fields and controls on the Purchase Orders - Purchase Order Details page. You can find definitions for the fields and controls later on this page.

Purchase Orders
Purchase Order Details
 BIKE SHOP

PO Number 000000247 Purchase Order Date 08/28/2012
 PO Status Dispatched Last Dispatch 08/28/12 10:10:15AM
 Buyer Kenneth Schumacher
 Billing Location US001
 Payment Terms Net 30

Purchase Order Total	
Merchandise Amount	975.00
Freight/Tax/Misc.	0.00
Total Amount	975.00 USD

Standard BU Comments

Purchase Order Lines Personalize | Find | View All | First 1 of 1 Last

Line	Status	Item ID	Description	Quantity	Merchandise Amt
1	Active	15013	Half Dome Helmet, Adults	39.0000 EA	975.00 USD

Invoice List Personalize | Find | View All | First 1 of 1 Last

Invoice	Invoice Date	Amount	Due Date	Appr Stat	Voucher
		0.000			

No Invoices Found
[Return to Purchase Order List](#)

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.

Image: Example of an Express Form page

This example illustrates the fields and controls on the Express Form page. You can find definitions for the fields and controls later on this page.

The screenshot shows a 'Business Card' form with the following fields and controls:

- Express Form Type: BCRD
- Express Form ID: NEXT
- *Name: VP1
- *Title: Kenneth Schumacher
- DIVISION: [Empty]
- *Address Line 1: [Empty]
- Address Line 2: [Empty]
- *City: [Empty]
- *Country: [Empty]
- *State: [Empty]
- *Postal Code: [Empty]
- *Telephone: [Empty]
- Telephone: [Empty]
- Telephone: [Empty]
- *Submitted By: change_me@oracle.com
- URLID: [Empty]
- PeopleSoft logo and contact information: PeopleSoft USA, Inc., 42345 Main Street, City, California 99999-9999. Tel: 512 999 9999, Voice 512 999 9999, Fax 512 888 8888, first.last@peoplesoft.com, http://www.peoplesoft.com
- Business Card Style ID: US Standard (dropdown)
- *Business Card Quantity: [Empty]
- Total Amount: [Empty]
- Buttons: OK, Cancel

See "Understanding Special Requests and Express Forms" (PeopleSoft FSCM 9.2: eProcurement).

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.

Related Links

[Reviewing Invoices](#)

Reviewing Order Summaries

Pages Used to Review Order Summaries

Page Name	Definition Name	Usage
View Order Summary - Select Supplier Page	PO_SS_VND_LIST	Suppliers select a supplier to navigate to its order summary inquiry pages. This page is available only if more than one supplier is associated with the user.
View Order Summary - Filter Options Page	PO_SSSRCH_SCHEDULE	Search for orders based on PO search criteria. Leaving all criteria fields blank results in no returned orders.
View Order Summary - Order Schedule Page	PO_SSSUPP_SCHED	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 Page	PO_SSSHIPTO_ADDR	Review ship to addresses for a PO schedule. View Order Summary - Order Schedule Page
View Order Summary - Change Order Details Page	PO_SSSUPP_SCH_CHOR	Review any change order details.

View Order Summary - Order Schedule Page

Use the View Order Summary - Order Schedule page (PO_SSSUPP_SCHED) to 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.

Navigation

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: <i>Approved</i> or <i>Not Approved</i> . Existing PO: <i>Initial, Open, Approved, Pending Approval, Canceled, Complete, or Dispatched</i> .
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.

View Order Summary - Change Order Details Page

Use the View Order Summary - Change Order Details page (PO_SSSUPP_SCH_CHOR) to review any change order details.

Navigation

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 <i>Change, Hold, Inserted, and Canceled</i> .
Source	The source planning system.

Reviewing Receipts

Pages Used to Review Receipts

Page Name	Definition Name	Usage
Review Receipts - Select Supplier Page	PO_SS_VND_LIST	Suppliers select a supplier to navigate to its receipt inquiry pages. This page is available only if more than one supplier is associated with the user.
Review Receipts - Filter Options Page	PO_SSSRCH_RECEIPTS	Search for supplier receipts.
Review Receipts - Receipt Lines Page	PO_SSRECVLST	Review receipt information and access receipt line details.
<u>Review Receipts - Receipt Details Page</u>	PO_SSRECV_DETAILS	Review receipt line details.

Review Receipts - Receipt Details Page

Use the Review Receipts - Receipt Details page (PO_SSRECV_DETAILS) to review receipt line details.

Navigation

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

Pages Used to Review Invoices

Page Name	Definition Name	Usage
Review Invoices - Select Supplier Page	PO_SS_VND_LIST	Suppliers select a supplier to navigate to its invoice inquiry pages. This page is available only if more than one supplier is associated with the user.
Review Invoices - Filter Options Page	PO_SSSRCH_INVOICES	Search for supplier invoices.
Review Invoices - Invoice List Page	PO_SSREV_INVOICES	Review general invoice information and access details for a specific invoice.
<u>Review Invoices - Invoice Details Page</u>	PO_SSINVC_DETAILS	Review invoice details and access other detail pages.
Review Invoices - Payment Details Page	PO_SSPYMNT_DETAILS	This page is a duplicate of the Review Payments - Payment Details page. <u>Review Invoices - Invoice Details Page</u>
Review Invoices - Purchase Order Lines Page	PO_SSPO_LINES	Review PO line details for the invoice and access other detail pages. <u>Review Invoices - Invoice Details Page</u>
Review Invoices - Purchase Order Schedule Page	PO_SSPO_SCHEDULE	Review schedule details for the selected line. <u>Review Invoices - Invoice Details Page</u>
<u>Review Invoices - Receipt Lines Page</u>	PO_SSRECV_LINES	This page is a duplicate of the Review Purchase Orders - Receipt Lines page.

Page Name	Definition Name	Usage
Review Invoices - Receipt Details Page	PO_SSRECV_DETAILS	This page is a duplicate of the Review Receipts - Receipt Details page. <u>Review Invoices - Receipt Lines Page</u>

Review Invoices - Invoice Details Page

Use the Review Invoices - Invoice Details page (PO_SSINVC_DETAILS) to review invoice details and access other detail pages.

Navigation

Review Payment Information > Invoices

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.

Review Invoices - Receipt Lines Page

Use the Review Invoices - Receipt Lines page (PO_SSRECV_LINES) to view lines received against the invoice.

Navigation

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

Pages Used to Review Payments

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Review Payments - Select Supplier Page	PO_SS_VND_LIST	Suppliers select a supplier to navigate to its payment inquiry pages. This page is available only if more than one supplier is associated with the user.
Review Payments - Filter Options Page	PO_SS_SEARCH	Search for supplier payments.
Review Payments - Payments Made Page	PO_SSPYMNTLST	View a list of payment information that meets the search criteria and access details for a specific payment.
Review Payments - Payment Details Page	PO_SSPYMNT_DETAILS	Review payment details. This page is a duplicate of the Review Invoices - Payment Details page.

Review Payments - Payment Details Page

Use the Review Payments - Payment Details page (PO_SSPYMNT_DETAILS) to review payment details.

This page is a duplicate of the Review Invoices - Payment Details page.

Navigation

Review Payment Information > Payments

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

Pages Used to Review Account Balances

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Account Balances - Select Supplier Page	PO_SS_VND_LIST	Suppliers select a supplier to navigate to its account balance inquiry pages. This page is available only if more than one supplier is associated with the user.
<u>Account Balances - Balances by Currency Page</u>	PO_SSVNDRBALST	View account balances, including the currency in which each balance is shown.
Account Balances - Invoice List Page	PO_SSVNDRBAL_DTL	Review general invoice account balance information and access details for a specific invoice.
<u>Account Balances - Invoice Details Page</u>	PO_SSINVC_LINES	Review account balance details.

Account Balances - Balances by Currency Page

Use the Account Balances - Balances by Currency page (PO_SSVNDRBALST) to view account balances, including the currency in which each balance is shown.

Navigation

Review Payment Information > Account Balances

This page appears only if the supplier has outstanding vouchers in different currencies. Otherwise, the Account Balances - Invoice List page appears.

Gross Amount

For all outstanding vouchers for the selected supplier. 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 supplier and currency.

Account Balances - Invoice Details Page

Use the Account Balances - Invoice Details page (PO_SSINVC_LINES) to review account balance details.

Navigation

- Click an invoice number link on the Account Balances - Invoice List page.
- Click an invoice number link on the Purchase Order Details page.

The supplier name and gross amount appear if you selected them on the Account Balances - Balance by Currency page. Otherwise, the supplier from the Account Balances - Select Supplier 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 6

Reviewing Supplier Performance

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 supplier'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 suppliers 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.

Related Links

[Understanding PeopleSoft eSupplier Connection Pagelets](#)

On-Time Metric

The On-Time metric tracks the percentage and actual number of supplier 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.

Related Links

[Defining Supplier Performance Targets and Tolerances](#)

[View Supplier Shipment Performance - On-Time Performance Page](#)

Quantity Metric

The Quantity metric tracks the percentage and actual number of supplier 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).

Related Links

[View Supplier Shipment Performance - Quantity Performance Page](#)

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).

Related Links

[View Supplier Shipment Performance - PO/Receipt Quantity Performance Page](#)

Quality Metric

The Quality metric tracks the percentage and actual number of supplier 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-supplier 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.

Related Links

[View Supplier Shipment Performance - Quality Performance page](#)

"Understanding Procurement Options" (PeopleSoft 9.2: Source to Settle Common Information)

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 supplier-specific targets and tolerances for the SetID.
5. Run the Procurement History Update process (FS_PRCRUPD).

Related Links

"Configuring Procurement Analysis Inquiries" (PeopleSoft FSCM 9.2: Purchasing)

"Generating Procurement History" (PeopleSoft FSCM 9.2: Purchasing)

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 supplier performance targets and tolerance levels, use the Supplier Performance Supplier component (WV_PE_METRIC_VNDR).

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

Pages Used to Define Supplier Performance Targets and Tolerances

Page Name	Definition Name	Usage
<u>Supplier Performance Setup Page</u>	WV_PE_METRIC_SETUP	Define system targets and tolerances for the Purchasing reporting entity.
<u>Supplier Performance Supplier Page</u>	WV_PE_METRIC_VNDR	Define supplier-specific targets and tolerances for a SetID.

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.

Use PeopleTools 2D Bar chart type.

See *PeopleTools PeopleBook: PeopleCode Language Reference*

Metrics

The system displays metrics against a specific target and tolerance for a particular supplier within a reporting entity if you define targets and tolerances on the Supplier Performance Supplier 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 "Define Procurement Controls Page" (PeopleSoft FSCM 9.2: Purchasing).

Supplier Performance Setup Page

Use the Supplier Performance Setup page (WV_PE_METRIC_SETUP) to define system targets and tolerances for the Purchasing reporting entity.

Navigation

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 "Define Procurement Controls Page" (PeopleSoft FSCM 9.2: Purchasing).

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 [View Supplier Shipment Performance - On-Time Performance Page](#).

Quantity Performance Target

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

See [View Supplier Shipment Performance - Quantity Performance Page](#).

Quality Performance Target

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

See [View Supplier Shipment Performance - Quality Performance page](#).

PO/Receipt Qty Perf. Target
(purchase order/receipt quantity performance target)

The optimal percentage of ordered versus received quantities for the given period.

See [View Supplier Shipment Performance - PO/Receipt Quantity Performance Page](#).

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 [Understanding Supplier Performance Metrics](#).

Supplier Performance Supplier Page

Use the Supplier Performance Supplier page (WV_PE_METRIC_VNDR) to define supplier-specific targets and tolerances for a SetID.

Navigation

Set Up Financials/Supply Chain > Product Related > Procurement Options > Purchasing > Supplier Performance Supplier

This page is nearly identical to the Supplier Performance Setup page with the exception that you are defining values for a specific supplier 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 topic provides an overview of viewing supplier performance metrics.

Pages Used to View Supplier Performance Metrics

Page Name	Definition Name	Usage
View Supplier Shipment Performance - On-Time Performance Page	WV_PE_METRIC_DTL	Track the percentage and actual number of shipments that are on time, early, and late for all items within the period.
View Supplier Shipment Performance - Quantity Performance Page	WV_PE_METRIC_DTL	Track the percentage and actual number of supplier shipments with correct quantities, over-shipment quantities, and under-shipment quantities by period.
View Supplier Shipment Performance - Quality Performance page	WV_PE_METRIC_DTL	Track the percentage and actual number of supplier shipment quantities that are inspected, accepted, rejected, and returned by period.
View Supplier Shipment Performance - PO/Receipt Quantity Performance Page	WV_PE_METRIC_DTL	Track the percentage and actual number of supplier shipment quantities that are inspected, accepted, rejected, and returned by period.
View Supplier Shipment Performance - Ship To Details Page	IN_SSQBALBUNIT_DET	View ship to details.
Email Message Page	WV_PE_EMAIL	Send an email from within the detail page about the data that you or the supplier are reviewing.

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 suppliers that are associated with the SetID. However, suppliers who use the external-facing pages can access only the suppliers to whom you have granted them access. Suppliers 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.

Supplier

This field appears when the user is associated with more than one supplier. Internal users can select a supplier that is associated with the SetID. The system displays only SetID-supplier 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 redisplay 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 redisplay the page and adds further detail for the selected period. In particular:

Item ID and Supplier 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 [Reviewing Receipts](#).

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 [Sending Email Messages](#).

View Supplier Shipment Performance - On-Time Performance Page

Use the View Supplier Shipment Performance - On-Time Performance page (WV_PE_METRIC_DTL) to track the percentage and actual number of shipments that are on time, early, and late for all items within the period.

Navigation

- Internal users: Purchasing > Analyze Procurement > Review Supplier Performance
Select a SetID, the appropriate metric, and supplier.
- External users: Click the Detail link on the appropriate pagelet.

Image: Example of the View Supplier Shipment Performance - On-Time Performance page before clicking the Period/Year link

This example illustrates the fields and controls on the Example of the View Supplier Shipment Performance - On-Time Performance page before clicking the Period/Year link. You can find definitions for the fields and controls later on this page.

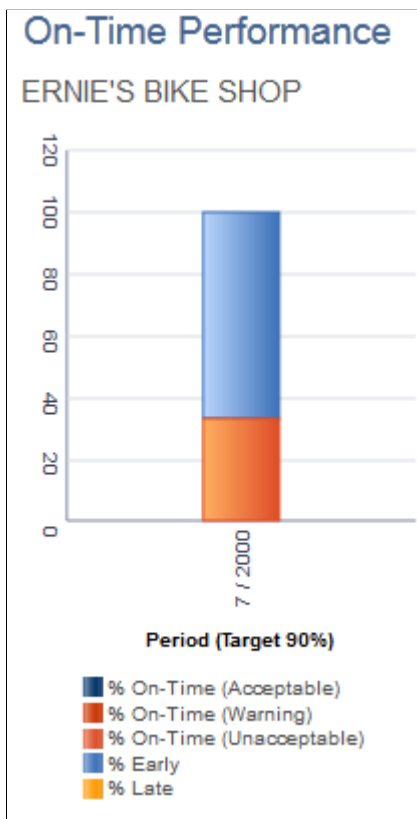


Image: Example of the appended Detail Information section after clicking the Period/Year link

This example illustrates the fields and controls on the Example of the appended Detail Information section after clicking the Period/Year link. You can find definitions for the fields and controls later on this page.

Detail Information for Period: 7 - 07/01/2000 thru 07/31/2000

From Percentage To Percentage

Category Ship To Refresh

Performance Detail Personalize | Find | View All | | | First 1-4 of 4 Last

Item ID	Description	% On Time	% Early	% Late
VNDR000001	Patch Kit	0.00	100.00	0.00
WHEEL	Wheel Tire, 700x23	0.00	100.00	0.00
MT3000	Mountain Bike, Woman's	50.00	50.00	0.00
MT3000	Mountain Bike, Woman's	50.00	50.00	0.00

[Send Email](#)

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 supplier-specific targets and tolerances.
Number of Receipts	Total number of receipts for a specific item and supplier for a period (includes all items).

Metric Name	Equation Used to Derive Metric
Early Ships	<p>Number of receipts (by period) that are marked as received early.</p> <hr/> <p>Note: A receipt is marked <i>early</i> 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.</p> <hr/> <p>Technically the system updates the PS_RECV_LN_SHIP.SHIP_DATE_STATUS field with the value 2.</p>
Late Ships	<p>Number of receipts (by period) that are marked as received late.</p> <hr/> <p>Note: A receipt is marked <i>late</i> 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.</p> <hr/> <p>Technically the system updates the PS_RECV_LN_SHIP.SHIP_DATE_STATUS field with the value 3.</p>
	<p>These columns appear when you select Early/Late Metrics by Quantity when setting system-wide or supplier-specific targets and tolerances:</p>
Receipt Quantity	<p>Total quantity received for a specific item and supplier for a period (includes all items).</p>
Qty Early	<p>Quantity received (by period) that is marked as received early.</p> <hr/> <p>Note: A receipt is marked <i>early</i> 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.</p> <hr/> <p>Technically the system updates the PS_RECV_LN_SHIP.SHIP_DATE_STATUS field with the value 2.</p>
Qty Late	<p>Quantity received (by period) that is marked as received late.</p> <hr/> <p>Note: A receipt is marked <i>late</i> 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.</p> <hr/> <p>Technically the system updates the PS_RECV_LN_SHIP.SHIP_DATE_STATUS field with the value 3.</p>

Related Links

[View Supplier Shipment Performance - On-Time Performance Page](#)

[Common Elements Used in This Section](#)

View Supplier Shipment Performance - Quantity Performance Page

Use the View Supplier Shipment Performance - Quantity Performance detail page (WV_PE_METRIC_DTL) to track the percentage and actual number of supplier shipments with correct quantities, over-shipment quantities, and under-shipment quantities by period.

Navigation

- 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 supplier for a period (includes all items).
Over Ships	<p>Number of receipts (by period) that are marked as over-received.</p> <hr/> <p>Note: A receipt is marked <i>over-received</i> 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.</p>
Under Ships	<p>Number of receipts (by period) marked as under-received.</p> <hr/> <p>Note: A receipt is marked as <i>under-received</i> 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.</p>

Related Links

[View Supplier Shipment Performance - Quantity Performance Page](#)

[Common Elements Used in This Section](#)

View Supplier Shipment Performance - Quality Performance page

Use the View Supplier Shipment Performance - Quality Performance page (WV_PE_METRIC_DTL) to track the percentage and actual number of supplier shipment quantities that are inspected, accepted, rejected, and returned by period.

Navigation

- 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.
% 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 supplier combination within a period.
Rejected Quantity	Sum of quantity that is rejected for all receipts for a specific item and supplier combination within a period.
Returned Quantity	Sum of quantity that is returned for all receipts for a specific item and supplier 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.

Related Links

[View Supplier Shipment Performance - Quality Performance page](#)

[Common Elements Used in This Section](#)

View Supplier Shipment Performance - PO/Receipt Quantity Performance Page

Use the View Supplier Shipment Performance - PO/Receipt Qty Performance page (WV_PE_METRIC_DTL) to track the percentage and actual number of supplier shipment quantities that are inspected, accepted, rejected, and returned by period.

Navigation

- 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 <i>x</i> period in the graph and <i>x</i> 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.

Related Links

[View Supplier Shipment Performance - PO/Receipt Quantity Performance Page](#)
[Common Elements Used in This Section](#)

Chapter 7

Using PeopleSoft eSupplier Connection Pagelets

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 Applications Portal.

See the product documentation for *PeopleTools: Portal Technology*

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.)

Pagelets are grouped 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 provided in the delivered sample data. Sample data security objects are delivered (roles and permission lists) so that you can use as an example of how to set up pagelet access.

Understanding Pagelets By Role

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

In this section, supplier-facing pagelets are organized 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.

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

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

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

Pages Used to Personalize Supplier-Facing Pagelets

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<Pagelet Name> - Personalize User Defaults Page	WV_PE_USR_DEF	Users associated with multiple supplier IDs can select a default supplier and where applicable, define the maximum number of retrieved records (rows) to display on the pagelet.
Personalize User Defaults - Save Confirmation Page	WV_PE_SAVE_CONFIRM	Confirm the changed user defaults.

Personalizing Supplier Pagelet User Defaults

Suppliers can select default suppliers, 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 supplier-SetID level.

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

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

Related Links

[Defining Supplier Performance Targets and Tolerances](#)

Viewing Supplier Activities

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
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 supplier using the Dispatch Supplier List or the Item Supply Supplier 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

Pagelet Name	Roles	Audience	Usage	Enabling Applications
Remaining Quantity Balances (WV_PE_QTY_BAL)	Supplier-Applications Administrator, Supplier-Production Manager	Employee	Displays the remaining quantities (and percentages) available, the quantity supplier-owned, and reorder point for consigned items.	Requires these products: PeopleSoft Collaborative Supply Management, PeopleSoft Inventory, and PeopleSoft Purchasing

Recently Dispatched POs Pagelet

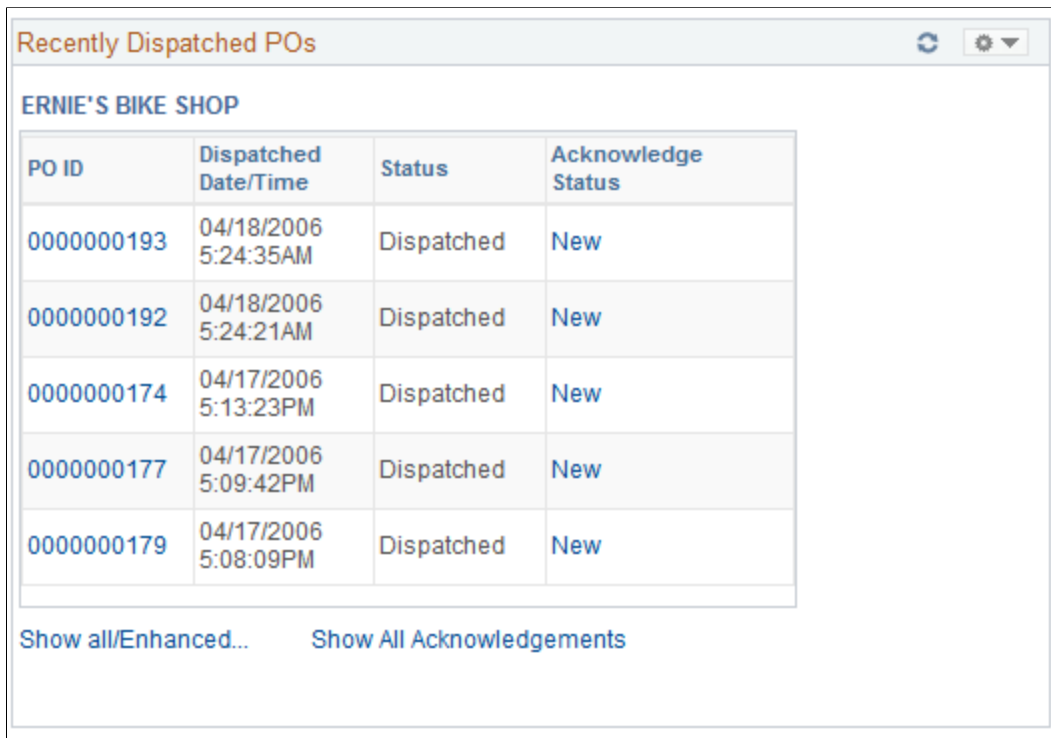
Use the Recently Dispatched POs pagelet (WV_PE_ORD_STAT) to display recent purchase orders, dates, status, and acknowledgement status.

Navigation

Click the Customize button on the Recently Dispatched PO supplier-facing pagelet.

Image: Example of Recently Dispatched POs pagelet

This example illustrates the fields and controls on the Recently Dispatched POs pagelet.



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.

Related Links

[Understanding Online POAs](#)

[Purchase Orders - Purchase Order List Page](#)

"Dispatching Purchase Orders" (PeopleSoft FSCM 9.2: Purchasing)

Recently Dispatched RFQs Pagelet

Use the Recently Dispatched RFQs pagelet (WV_PE_RFQ_PGLT) to display recently dispatched RFQs.

You must first create RFQs in PeopleSoft Purchasing, and assign the RFQ to the supplier using the Dispatch Supplier List or the Item Supply Supplier List.

Navigation

Click the Customize button on the Recently Depicted RFQ supplier-facing pagelet.

Image: Example of Recently Dispatched RFQs pagelet

This example illustrates the fields and controls on the Recently Dispatched RFQs pagelet.

RFQ ID	DtTm Open	DtTm Close	Status
0000000007	02/03/2003 8:19AM		New
0000000006	02/03/2003 8:14AM		New

[Show all/Enhanced...](#)

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

Status

Displays the status of the RFQ. Statuses are:

- *New*: The supplier has not entered a response.
- *Partially Responded*: The supplier has responded to some but not all of the line items on the RFQ.
- *Responded*: The supplier has responded to all of the RFQ's lines.

Show all/Enhanced

Click to access the Review Request for Quotes Filter Options page.

Related Links

[Reviewing and Responding to RFQs](#)

"Dispatching Purchase Orders" (PeopleSoft FSCM 9.2: Purchasing)

Recent ASNs Pagelet

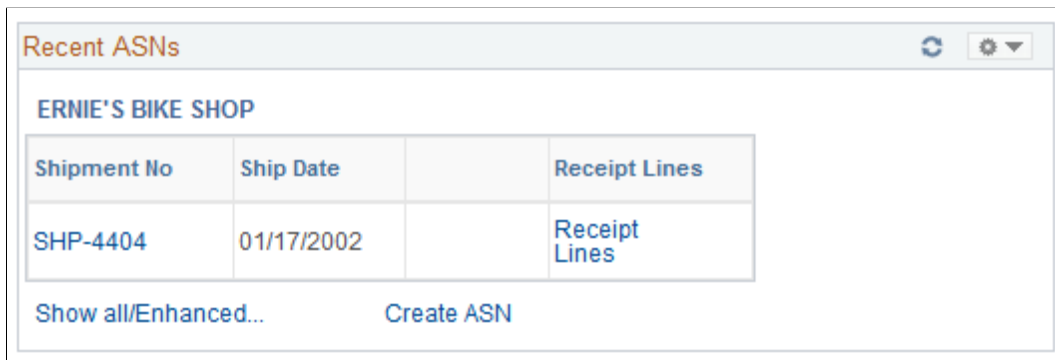
Use the Recent ASNs pagelet (WV_PE_ASN_LIST) to display shipment IDs from supplier-entered advance shipping notifications, shipping dates, and receipt lines.

Navigation

Click the Customize button on the Recent ASNs supplier-facing pagelet.

Image: Example of Recent ASNs pagelet

This example illustrates the fields and controls on the Recent ASNs pagelet.



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.

Related Links

[Understanding Supplier ASNs](#)

[Reviewing Receipts](#)

Recently Dispatched Schedules Pagelet

Use the Recently Dispatched Schedules pagelet (WV_PE_DISP_SCHEDS) to display the most recently dispatched schedules.

Navigation

Click the Customize button on the Recently Dispatched Schedules supplier-facing pagelet.

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 PeopleSoft Workflow to send scheduling task notification to the supplier. A supplier accesses task details by clicking a link for a supplier schedule worklist item on the Tasks pagelet in PeopleSoft Applications Portal. 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 the product documentation for *PeopleSoft Interaction Hub: Portal and Site Administration* and *PeopleSoft Interaction Hub: Using Portal Features* and *PeopleTools: Portal Technology*

Remaining Quantity Balances Pagelet

Use the Remaining Quantity Balances pagelet (WV_PE_QTY_BAL) to display the remaining quantities (and percentages) available, the quantity supplier-owned, and reorder point for consigned items. The system first displays the items that are closest to their reorder points.

Navigation

Click the Customize button on the Remaining Quantity Balances supplier-facing pagelet.

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 remaining)

Displays the percentage remaining, derived by this equation:

$$(\text{Quantity available} - \text{reorder point}) / \text{restock value} \times 100$$

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 topic discusses how the suppliers view performance metrics using these pagelets.

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

Related Links

[Defining Supplier Performance Targets and Tolerances](#)

[Viewing Supplier Performance Metrics](#)

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 supplier 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 supplier shipment quantities inspected, accepted, rejected, and returned by period.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing
Quantity Performance (WV_PE_METRIC_3)	Supplier-Applications Administrator, Supplier-Customer Service Rep	Supplier	Displays the percentage and actual number of supplier shipments with correct quantities, over-shipment quantities, and under-shipment quantities by period.	PeopleSoft eSupplier Connection, PeopleSoft Purchasing

On-Time Performance Pagelet

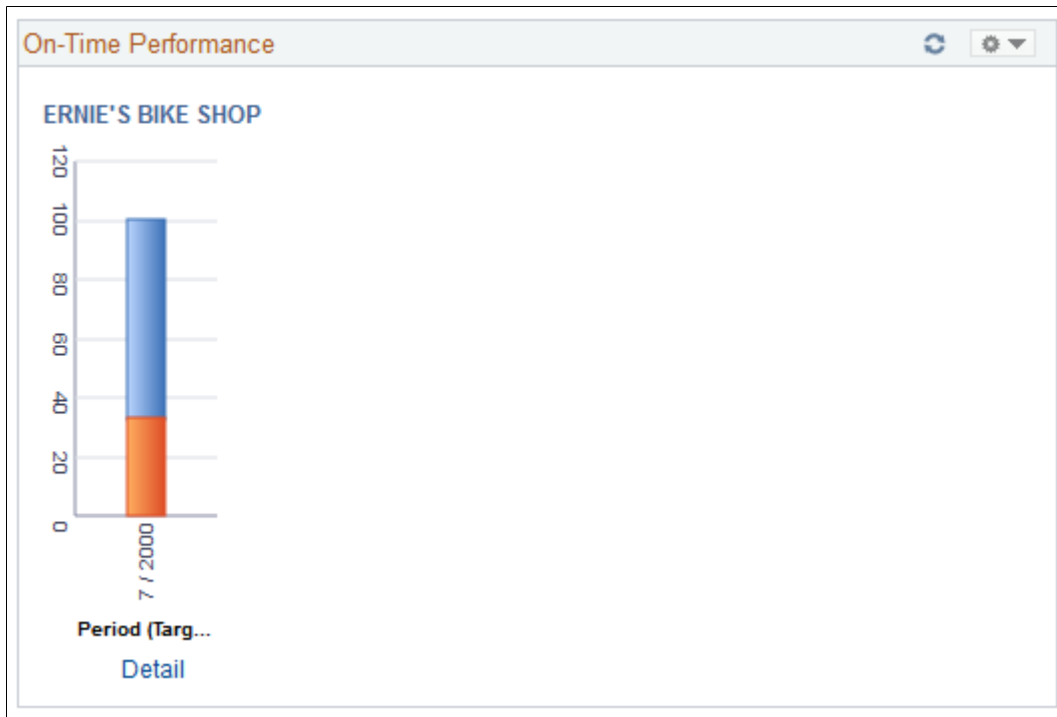
Use the On-Time Performance pagelet (WV_PE_METRIC_1) to display the percentage and actual number of shipments that are on time, early, and late for all items within the period.

Navigation

Click the Customize button on the On-Time Performance supplier-facing pagelet.

Image: On-Time Performance pagelet

This example illustrates the fields and controls on the On-Time Performance pagelet.



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.

Related Links

[Reviewing Receipts](#)

Quantity Performance Pagelet

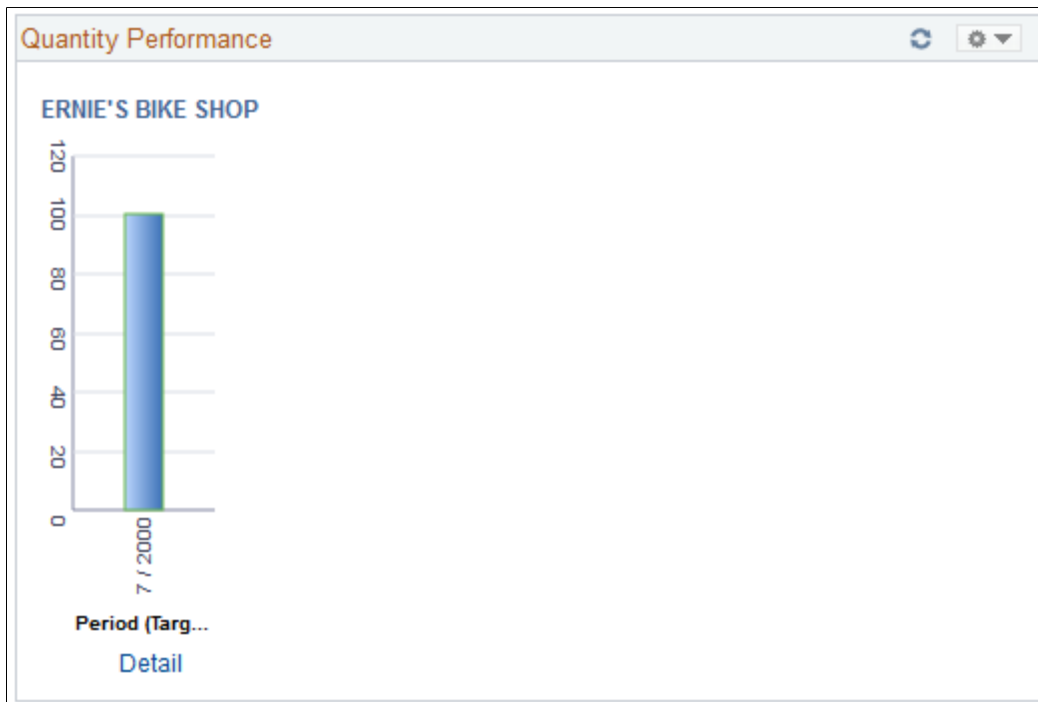
Use the Quantity Performance pagelet (WV_PE_METRIC_3) to display the percentage and actual number of supplier shipments with correct quantities, over-shipment quantities, and under-shipment quantities by period.

Navigation

Click the Customize button on the Quantity Performance supplier-facing pagelet.

Image: Quantity Performance pagelet

This example illustrates the fields and controls on the Quantity Performance pagelet.



The pagelet features a graph that displays the supplier 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.

Related Links

[Viewing Supplier Performance Metrics](#)

Quality Performance Pagelet

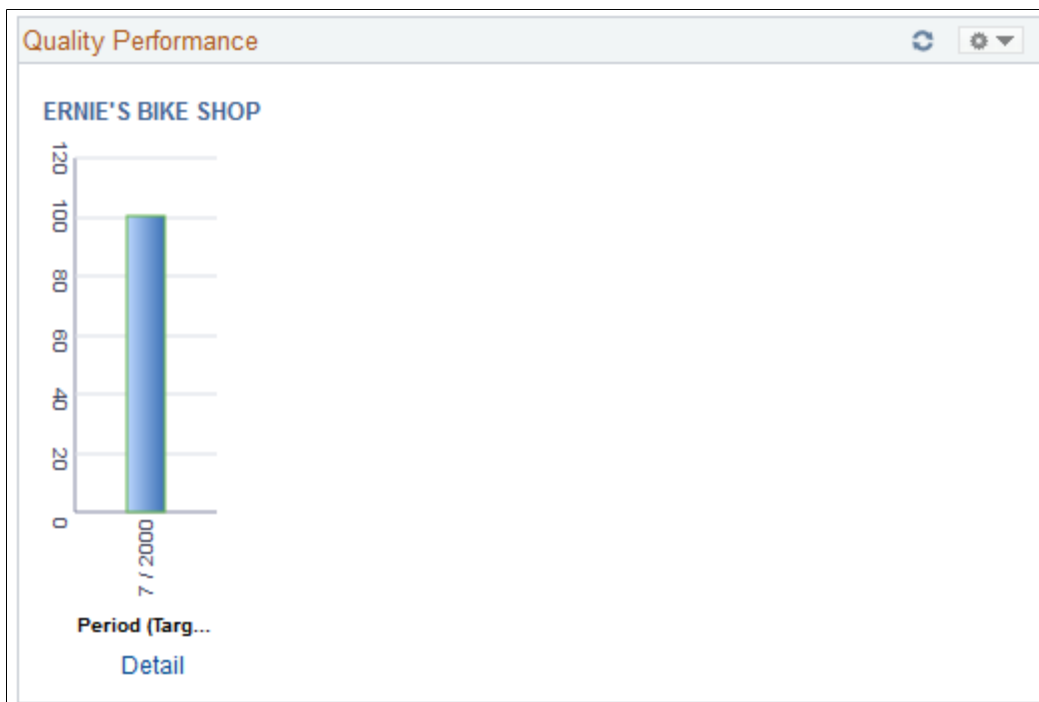
Use the Quality Performance pagelet (WV_PE_METRIC_2) to display the percentage and actual number of supplier shipment quantities inspected, accepted, rejected, and returned by period.

Navigation

Click the Customize button on the Quality Performance supplier-facing pagelet.

Image: Quality Performance pagelet

This example illustrates the fields and controls on the Quality Performance pagelet.



The pagelet features a quality performance graph that displays the percentage net received metric, supplier name, and target percentage.

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

Related Links

[View Supplier Shipment Performance - Quality Performance page](#)

PO/Receipt Quantity Performance Pagelet

Use the PO/Receipt Qty Performance pagelet (WV_PE_METRIC_4) to display the percentage and actual number of supplier shipment quantities inspected, accepted, rejected, and returned by period.

Navigation

Click the Customize button on the PO/Receipt Quantity Performance supplier-facing pagelet.

The pagelet features a purchase order-versus-receipt quantity performance graph that displays the percentage open receipt quantity metric, supplier 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.

Related Links

[View Supplier Shipment Performance - PO/Receipt Quantity Performance Page](#)

Appendix A

Delivered Workflows for PeopleSoft eSupplier Connection

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

<i>Information Type</i>	<i>Description</i>
Event Description	An RFQ is dispatched.
Action Description	Worklist Notification to a supplier user related to the supplier/ 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

<i>Information Type</i>	<i>Description</i>
Business Process	PO_RFQ_DISPATCH
Activity	PO_RFQ_DISPATCH
Role	Supplier - Customer Service Rep

Notify Supplier

The section discusses the Notify Supplier workflow.

Description

<i>Information Type</i>	<i>Description</i>
Event Description	A PO is dispatched.
Action Description	Notifies supplier of PO dispatch if dispatch method is email. A link is included for supplier to access PeopleSoft Purchasing.
Notification Method	Email

Workflow Objects

<i>Information Type</i>	<i>Description</i>
Business Process	PO_EMAIL_DISP
Activity	NOTIFY_VENDOR
Role	Supplier

PO Acknowledgement

The section discusses the PO Acknowledgement workflow.

Description

<i>Information Type</i>	<i>Description</i>
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 supplier has received a purchase order and that the supplier 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

<i>Information Type</i>	<i>Description</i>
Business Process	PO_ACKNOWLEDGEMENT
Activity	PO_ACKNOWLEDGEMENT

<i>Information Type</i>	<i>Description</i>
Role	Buyer

