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Foreword

Public procurement in Kenya has undergone significant development. In the 1960s, the system did not have regulations. This however changed in the 1970s, 1980s and 1990s with the regulation by Treasury circulars. Today, new public procurement standards lead the way premised on Public Procurement and Disposal Act of 2005 and Procurement Regulation of 2006 that created Public Procurement Oversight Authority (PPOA).

A notable transformation commenced in 2003 when the government introduced the Integrated Financial Management Information System (IFMIS) as a Public Finance Management (PFM) reform initiative to automate and streamline Government financial management processes and procedures. Procure to Pay (P2P) is a major component of the IFMIS system. Its aim is to provide an efficient and streamlined procurement and payment system by fully automating the procurement and payment process. This will among others increase control and visibility over the entire life-cycle of a procurement transaction from procurement planning to payment, reduce paperwork, eliminate physical delivery of documents and ensure that suppliers receive payments in days instead of weeks.

Some of the key procurement functionalities configured in the IFMIS Procure to Pay system are: Procurement Planning; Supplier Management; Requisition Management; Quotation Management; Purchase Order (PO) Management; Receipt Management; Invoicing and Payments Management; Inventory Management; Contract Management; Reconciliations and Period End Close.

Electronic procurement begins with the development of procurement plans to the actual procurement of goods and services as well as payment of suppliers for goods delivered or services performed. The system will also ensure compliance with legislation and regulations. But even more important, is the access the IFMIS Procure to Pay System accords suppliers to transact online during the procurement process through Kenya Supplier Portal.
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Introduction

IFMIS electronic procurement is a major breakthrough for public Public Finance Management. Electronic procurement plays a key role in prudent government financial management and resource allocation. It has introduced a new era to government procurement by bringing to an end manual procurement challenges the country has experienced in the past. The National Treasury’s IFMIS Department and the Public Procurement Oversight Authority (PPOA) continue to work towards full automation of this process.

There are many benefits of electronic procurement. The National Treasury has committed resources to ensure Ministries, Departments, Agencies and Counties continue to enjoy the benefits of this process. These include increase in transparency and accountability at all levels of the procurement process; reduction of processing time and costs and curtailing of risks as well as errors common in a manual environment. The system also notifies suppliers of the status of the award, contract or Local Purchase Order (LPO).
Kenya Supplier Portal

Definition

What is Kenya Supplier portal?

1) Is an application that enables buying companies and their suppliers to communicate key information directly with each other

2) It enables suppliers to receive immediate notifications from buyers and respond to them

The Kenya Supplier Portal is being deployed at IFMIS to enable government suppliers to efficiently manage interaction and communication with the government for all purchasing activity. The portal provides a secure, Internet-based access point that enables direct and real-time access to purchasing and invoicing activity with IFMIS.

Suppliers access the latest information for their individual accounts, including:

- Purchase Orders
- Receipt information
- Invoice and Payment status

The two-way collaboration enables suppliers to:

- View and acknowledge purchase orders
- Submit purchase orders change requests
- View your current purchase agreements
- View buying company’s response to your requests
- View invoices, receipts and received payments
- Search for order, receipt, invoice, and payments

Sourcing Supplier Portal

Registered suppliers will also have access to the Sourcing Supplier portal. This portal also provides a secure, Internet-based access point that enables direct and real-time access for responding to bid invitations and communicating directly with the GOK Procuring Units.
The Sourcing Supplier Portal enables suppliers to:

- Receive immediate notification of bid request invitations from the Buyer.
- Complete and submit complete bid responses online

The layout of this Training Manual is indicated in the following table:

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Table 1: Training Manual layout

Related Policies

Below is the list of relevant government Supply Chain Management (SCM) Policies and Procedures:

- General commercial laws (e.g. Sale of Goods Act Cap 31, Law of Contracts Cap 23, Government Contracts Act, Cap 25, etc);
- Laws governing state corporations;
- Labour, tax, customs and banking laws among a myriad of other statutes containing aspects of procurement;
- Laws governing the practice of various professions; and


Objectives

This manual Outlines how Kenya Supplier Portal users will:

- Access the Kenya Supplier portal and Home Page
- Use the Orders tab and related functions
- Use the Finance tab and related functions
- Use the Sourcing responsibility to respond to bid requests and communicate directly with the GOK procuring unit.
Topic 1: Kenya Supplier Portal and Home Page Review

Supplier Access and Account Setup

Approved supplier users will be registered at IFMIS for access to the Kenya Supplier portal.

Registered suppliers will receive valid UserID and Password login credentials via email from designated IFMIS administrators. The email information will also include the appropriate link to the Kenya Supplier login page for access.

This topic covers:

Navigation to the Kenya Supplier Portal Home Page

Review of Home Page elements

Kenya Supplier Portal Login

The Login screen is displayed.

1- Enter assigned value in the User Name field.
2- Enter assigned value in the Password field.

The Oracle Applications Home Page is displayed.

4- Click the Supplier Portal Full Access / Home Page link.
The Kenya Supplier Portal Home Page is displayed.

5- Note the Notifications region of the screen. Notifications from the procuring unit personnel will be received in this section.

6- Note the Orders At A Glance region of the screen. This region will always contain the five most recent purchase orders for immediate review, showing PO Number, Description, and Order Date.

All purchase orders can be reviewed in detail from this region of the screen.

7- Click the link for the PO Number as indicated to drill down to the additional summary information.
The **Order Information** window is displayed.

8- Note the **Summary** information for the order.

9- Note the additional information shown, including **Buyer** and **Order Status**.

The **PO Details** region of the window shows summary information for each line of the order.

11- Click the **Return to Home** link to return to the main page.
**Topic 2: Kenya Supplier Portal Home Page – Orders Tab**

Kenya Supplier portal users will have direct access to summary and detail information related to orders through the **Orders** tab. This tab also provides links to additional information pertaining to orders, including **PO Changes** and **Agreements**.

This topic covers:

- Overview of the Orders tab and summary information
- Review of views related to Purchase Orders
- Access to Purchase Agreements information

**Orders Tab – Summary Information**

The **Home Page** is displayed.

1- Click on the **Orders** tab.

The **Purchase Orders** window is displayed. This window contains all purchase orders. Note the **links** for drilldown to each **PO Number** listed. The window displays 25 order listings at a time.

2- Use the **vertical scroll bar** to scroll down the list.
3- Click on the **Next 25** link to view the additional listings.
The window is refreshed to display the next 25 records.

4- Click on the Previous 25 link to view the previous listings.

The order information is listed in sequence by the latest Order Date.

5- Click the indicator next to Order Date to reverse the sequence.
The order information is now listed in sequence by the earliest **Order Date**.

6- Click the indicator next to **Order Date** again to return to the original sequence.

**Utilizing Purchase Order View**

Use the **View** function to narrow the order search.

1- Click the **Advanced Search** button.

The **Advanced Search** window is displayed. Note the multiple **parameters** available for search.

2- Enter a specific value in the **PO Number** field.

3- Click the **Go** button to execute the search.
Search results are displayed.

4- Click the link under PO Number to view additional information for the order.

All Change Order history is displayed for the order.

7- Click the Ok button to close the window.
Returning to the **Actions** box:

8- Select the **View PDF** value.
9- Click the **Go** button.

The **File Download** window is displayed.
10- Click the **Open** button.

A **PDF** copy of the order is displayed. Use this copy for printing or save to desktop.
11- Use the **File>Exit** command to exit from the PDF document.
Viewing Order Agreements

Supplier purchase agreements with IFMIS can be viewed in detail through the link under the Orders tab.

1- Click the Agreements link.

The Supplier Agreements window is displayed. Use this window to search for agreements using multiple criteria.

2- To search for all Agreements, click the Go button.

The search results are displayed.

3- To view a specific Agreement, click the link under the PO Number column.
Detail information for the Agreement is displayed, including all **Releases** associated with the Agreement.

4- Click the **Return to Orders, Agreements** link.

The **Supplier Agreements** window is displayed.

5- Click the **Home** tab to return to the main portal page.
Topic 3: Kenya Supplier Portal Home Page – Finance Tab

Kenya Supplier portal users will have direct access to multiple levels of financial information through the Finance tab. This tab provides links to invoice and payment information.

This topic covers:

- Overview of the Finance tab and summary information
- Review of Invoice details
- Review of Payments details

The Home Page is displayed.
1- Click on the Finance tab.

Invoice Information

The View Invoices window is displayed. Note the multiple criteria available for query.
2- Enter the value in the PO Number field.
3- Click the Go button.
Search results are displayed in summary for all invoices related to the PO.
4- Click the link under Invoice to view details.

Detail information for the invoice is displayed.
5- Note the Payment Information summary box.
6- Click the Scheduled Payments tab.

Payment Schedule information for the invoice is displayed.
7- Click the Hold Reasons tab.

Hold and Release information for the invoice is displayed.
8- Click the Return to Finance, View Invoices link.
Payments Information

1- Click the View Payments link under the Finance tab.

2- Enter the value in the Invoice Number field.
3- Click the Go button.

4- Click the link under the Payment to view detail information.

5- Click the Return to Finance, View.
To confirm the status of the submitted invoice:

1-   Click the View Invoices link.

The View Invoices window is displayed.

2-   Enter the value in the Invoice Number field.

3-   Click the Go button.

Search results are displayed.

4-   Note the summary information for the invoice, including the Status of In-Process.
Topic 4: Sourcing Supplier Portal

Supplier Access to Sourcing Supplier Portal

Approved supplier users to will be registered at IFMIS for access to this portal.

Registered suppliers will receive valid UserID and Password login credentials via email from designated IFMIS administrators. The email information will also include the appropriate link to the login page for access.

This topic covers:

- Navigation to the Sourcing Supplier Home Page and Review
- Responding to RFQ invitations through online quote creation
- Creating online discussions through portal messaging

Sourcing Supplier Home Page

The Oracle Applications Home Page is displayed.

Note the Sourcing Supplier responsibility listed. This responsibility provides access to the Home Page for Sourcing Supplier.

Note the Worklist region of this page. All Invitations for quote responses will be listed here.

1. Click the Subject link to view the details of the invitation.
The **Invitation Details** are displayed. Supplier users can respond directly from this screen, or create a separate detailed **quote** for response.

2- Click the **Return to Worklist** link.

3- Use the **Sourcing / Sourcing Home Page** link to navigate to the **Home Page**.

The **Home Page** is displayed.

4- Note the information contained in the **Your Active and Draft Responses** region of the page. You will use this region to navigate directly to all responses.

5- Note the information contained in the **Your Company’s Open Invitations** region of the page. All open invitations for RFQ response will be listed here.

6- Note the **Quick Links** region of the page. You will use this region to navigate **directly** to view Responses by Type (Active/Disqualified/Accepted/Rejected). Use this region to also update **Personal Information** related to contact information for responses.
Creating Quotes

Registered supplier users can immediately respond to IFMIS bid invitations through the portal. Completed quotes can include notes to buyer, and any attachments that the supplier user wants to add as part of the response. Prior to submission, quote responses can be **validated** to ensure all required information is entered on the response.

All active quote responses are listed in the **Your Active and Draft Responses** section of the Home Page.

1- Click the link under the **Negotiation Number** field to access the negotiation.

The **Negotiations** window is displayed, showing **summary** information for the RFQ.

2- Click on the **Lines** tab to access the lines of the RFQ.
The **RFQ Lines** window is displayed, showing all detail lines information for the RFQ.

3- Click on the **Controls** tab to view response rules for the RFQ.

![Image of RFQ Lines window](Image)

The **Controls** window is displayed, listing the **Schedule** information and all valid **Response Rules** established by the IFMIS buyer for the RFQ.

4- Review the information in this window.

5- To initiate the creation of the quote response, select the **Create Quote** value in the **Actions** box.

6- Click the **Go** button.

![Image of Create Quote window](Image)

The **Create Quote** window is displayed. The window defaults to the **Header** area of the quote.

7- Use the **Calendar** icon to enter the appropriate value for the **Quote Valid Until** date.
The Calendar window is displayed.

8- Select the appropriate Day value.

9- Enter the value for the Reference Number of the quote response.

10- If desired, enter a Note to Buyer (up to 240 characters) in the designated field.

11- Click the Lines tab.

The Lines window is displayed.

12- Enter the Quote Price and Promised Date for each line.

13- When complete, click the Continue button.
The **Review and Submit** window is displayed.

14- Use the **Validate** button to initiate pre-validation of the quote to ensure all required information has been entered prior to submission.  

**Note:** At any point in quote creation, the user can click the **Save Draft** button prior to submission, and return to the quote to continue creation in another session.

The **Confirmation** window is displayed to indicate validation with no errors.  
15- Click the **Submit** button.

The **Confirmation** window is displayed to confirm successful submission of the quote.  
16- Click the **Return to Sourcing Home Page** link.
Creating Online Discussions

Portal supplier users can utilize the **messaging** capabilities to communicate directly with IFMIS Procuring Unit with questions or requests for more information during negotiations. Users will receive updates when message responses are received from IFMIS personnel.

All active quote responses are listed in the **Your Active and Draft Responses** section of the Home Page.

1- Click the **link** under the **Response Number** field to open the response.

The **Quote** window is displayed.

2- To initiate the creation of a **discussion**, select the **Create Discussion** value in the **Actions** box.

3- Click the **Go** button.

The **Online Discussions** window is displayed. Any previous messages or replies related to this quote will be listed in the **Messages** region of the window.

4- Click the **New Message** button.
The **Create New Message** window is displayed. The **Send To** is pre-populated with the appropriate IFMIS recipient address.

5- Enter the desired value in the **Subject** field.
6- Enter the desired text (up to 240 characters) in the **Message** field (scrolling field).
7- Click the **Send** button.

The **Create New Message** window is closed and user is returned to the **Online Discussions** window.

8- Note the inclusion of the new discussion record under the **Messages** region of the window.

The message has now been sent directly to IFMIS purchasing buyer.

9- Note the **Unread Messages** column in the **Your Active and Draft Responses** section of the **Home Page** window – any reply to your message will display an update to the **link** in this column.
Summary

Congratulations! You have now learned how to:

✓ Access the Kenya Supplier portal and Home Page
✓ Use the Orders tab and related functions
✓ Use the Finance tab and related functions
✓ Use the Sourcing responsibility to respond to bid requests and communicate directly with GOK Procuring unit.