



IFMIS P2P KENYA SUPPLIER PORTAL TRAINING MANUAL

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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:

Chapter	Topic
Chapter 1: Kenya Supplier Portal Overview	Lesson 1: Introduction to Kenya Supplier Portal

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

Supply chain management: A guide for accounting officers/authorities.

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.

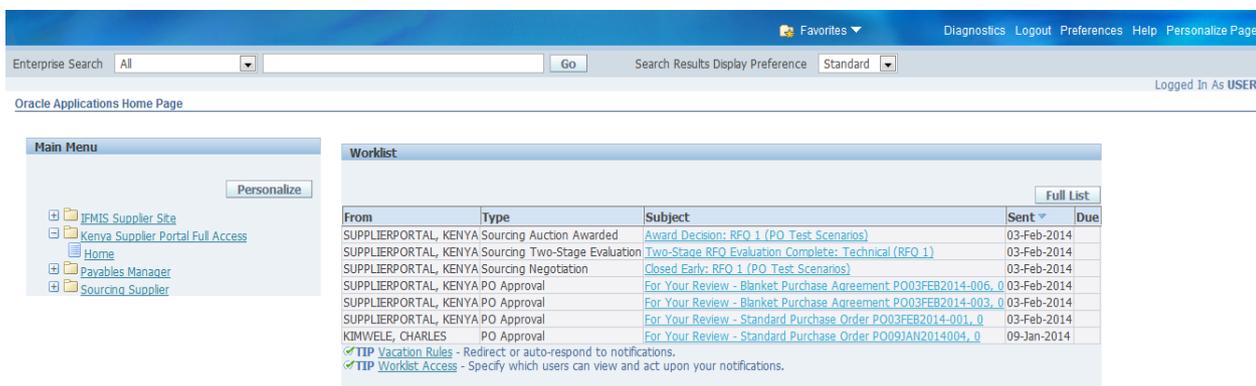
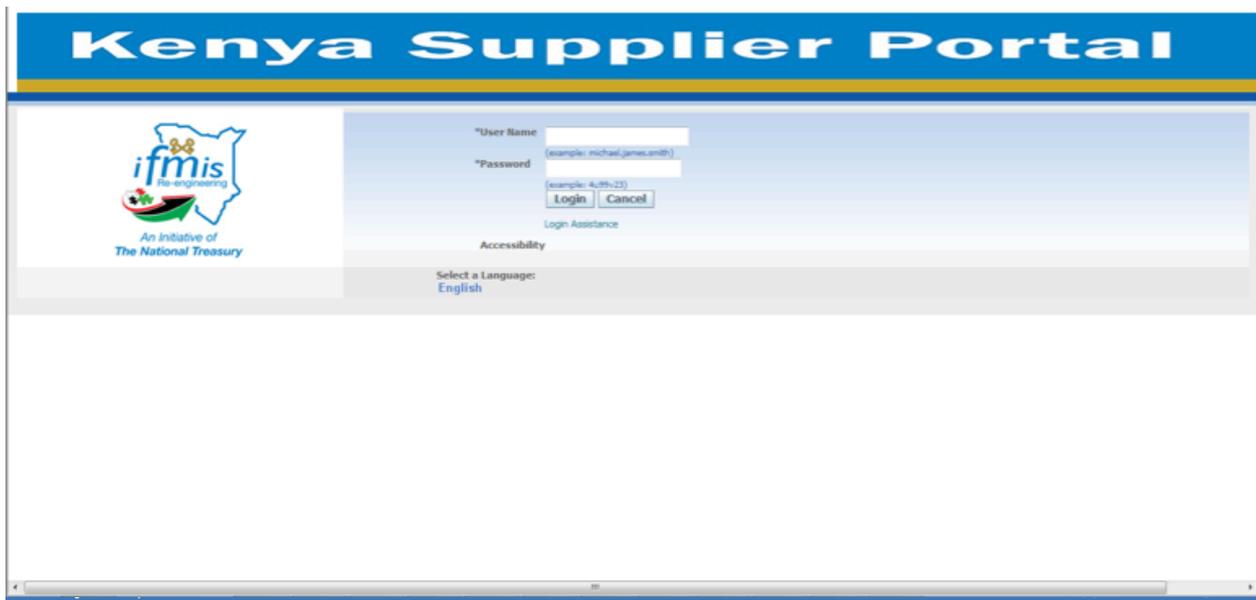
This topic covers:

- 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.

IFMIS Kenya Supplier Portal Full Access

Home | **Orders** | Finance

Search PO Number Go

Notifications

Subject	Date
Award Decision: RFQ 1 (PO Test Scenarios)	03-Feb-2014 19:05:46
Two-Stage RFQ Evaluation Complete: Technical (RFQ 1)	03-Feb-2014 18:59:14
Closed Early: RFQ 1 (PO Test Scenarios)	03-Feb-2014 18:55:04
For Your Review - Blanket Purchase Agreement PO03FEB2014-006_0	03-Feb-2014 16:36:27
For Your Review - Blanket Purchase Agreement PO03FEB2014-003_0	03-Feb-2014 16:03:44

Orders At A Glance

PO Number	Description	Order Date
202030		26-Feb-2014 20:05:52
202020		26-Feb-2014 20:04:18
kk7	aah ah! Now!!	26-Feb-2014 19:23:37
kk4	krik krik	26-Feb-2014 19:03:01
kk02	Agaria	26-Feb-2014 14:47:06

Home Orders Finance Home Logout Preferences Personalize Page Diagnostics

About this Page Privacy Statement Copyright (c) 2008, Oracle. All rights reserved.

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**.

Orders At A Glance

PO Number	Description	Order Date
13000334		10/09/2013 08:42:37
13000332		10/08/2013 20:52:06
13000326		10/08/2013 14:19:30
13000290		10/07/2013 12:52:12
13000289		10/07/2013 12:51:44

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.

Home Orders Finance

Purchase Orders Agreements

Home >

Standard Purchase Order : 202030, 0 (Total KE \$ 109,340.00)

Currency=KES

Actions Acknowledge Go Export

Order Information

General

Total 109,340.00
Supplier PRC LIMITED
Supplier Site OLDONYO
Address ENAPAI BUILDING
ENAPAI AVENUE
PO BOX 123
RONGAI, 00200

Buyer SUPPLIERPORTAL, Miss KENYA
Order Date 26-Feb-2014 20:05:52
Description
Status Supplier Change Pending
Reason
Note to Supplier
Operating Unit The National Treasury
Sourcing Document
Supplier Order Number
Attachments None

Terms and Conditions

Payment Terms IMMEDIATE
Carrier
FOB
Freight Terms
Shipping Control

Ship-To Address
Address P.O.Box 40112
NAIROBI,

Bill-To Address
Address P.O.Box 40112
NAIROBI,

Summary

Total 109,340.00
Payment Status Not Paid
Received In Process
Invoiced In Process

PO Details

Indicates new values
Indicates cancellation request

Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
1	Goods	M001000639		COMPUTER, SERVER,POWEREDGE R710 RACK CHASSIS FOR UP TO 6X 3.5" HDDS AND INTEL 55XX/56XX PROCESSORS (NO INTERNAL TBU SUPPORT),INTEL XEON X5660 (2.80GHZ, 6C, 12M CACHE, 6.40 GT/S QPI, 95W TDP, TURBO, HT), DDR3-1333MHZ,48 GB	Each	2	54670	109340	Open		

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**.

PO Details

Indicates new values
Indicates cancellation request

Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
1	Goods	M001000117		COMPUTER, DIGITAL; UNIT DESIGN DELL OPTIPLEX GX780, DATA STORAGE CAPACITY 20 GB, MEMORY SIZE 2 GB, PROCESSOR CHIP TYPE INTEL CORE 2 DUO, PROCESSOR CLOCK SPEED 2.93 GHZ, OPTIONAL EXTRAS DVD?RW	Each	10	120000	1200000	Open		

Return to Home

Actions Request Cancellation Go Export

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.

Home Orders Finance

Purchase Orders Agreements

Home >

Standard Purchase Order : 202030, 0 (Total KE \$ 1,200,000.00)

Currency=KES

Actions Request Cancellation Go Export

Order Information

General

Total 1,200,000.00
Supplier PRC LIMITED
Supplier Site OLDONYO
Address ENAPAI BUILDING
ENAPAI AVENUE
PO BOX 123
RONGAI, 00200

Buyer SUPPLIERPORTAL, Miss KENYA
Order Date 26-Feb-2014 14:47:06
Description Agaria
Status Accepted
Reason
Note to Supplier
Operating Unit The National Treasury
Sourcing Document
Supplier Order Number
Attachments None

Terms and Conditions

Payment Terms IMMEDIATE
Carrier
FOB
Freight Terms
Shipping Control

Ship-To Address
Address P.O.Box 40112
NAIROBI,

Bill-To Address
Address P.O.Box 40112
NAIROBI,

Summary

Total 1,200,000.00
Payment Status Not Paid
Received In Process
Invoiced In Process

PO Details

Indicates new values
Indicates cancellation request

Line	Type	Item/Job	Supplier Item	Description	UOM	Qty	Price	Amount	Status	Attachments	Reason
1	Goods	M001000117		COMPUTER, DIGITAL; UNIT DESIGN DELL OPTIPLEX GX780, DATA STORAGE CAPACITY 20 GB, MEMORY SIZE 2 GB, PROCESSOR CHIP TYPE INTEL CORE 2 DUO, PROCESSOR CLOCK SPEED 2.93 GHZ, OPTIONAL EXTRAS DVD?RW	Each	10	120000	1200000	Open		

Return to Home

Actions Request Cancellation Go Export

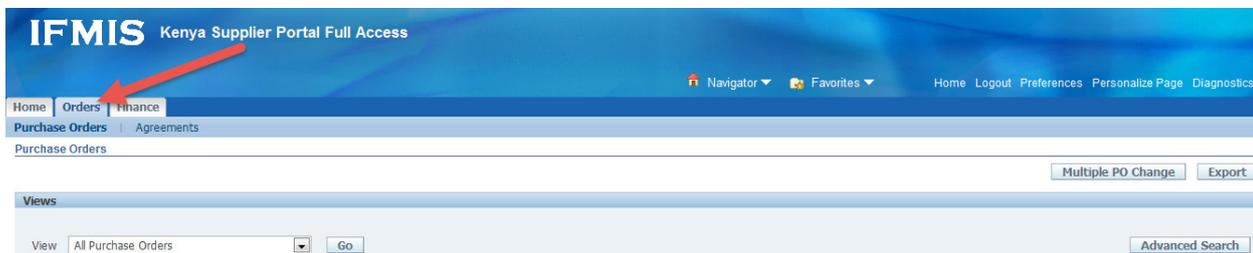
Topic 2: Kenya Supplier Portal Home Page – Orders Tab

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:

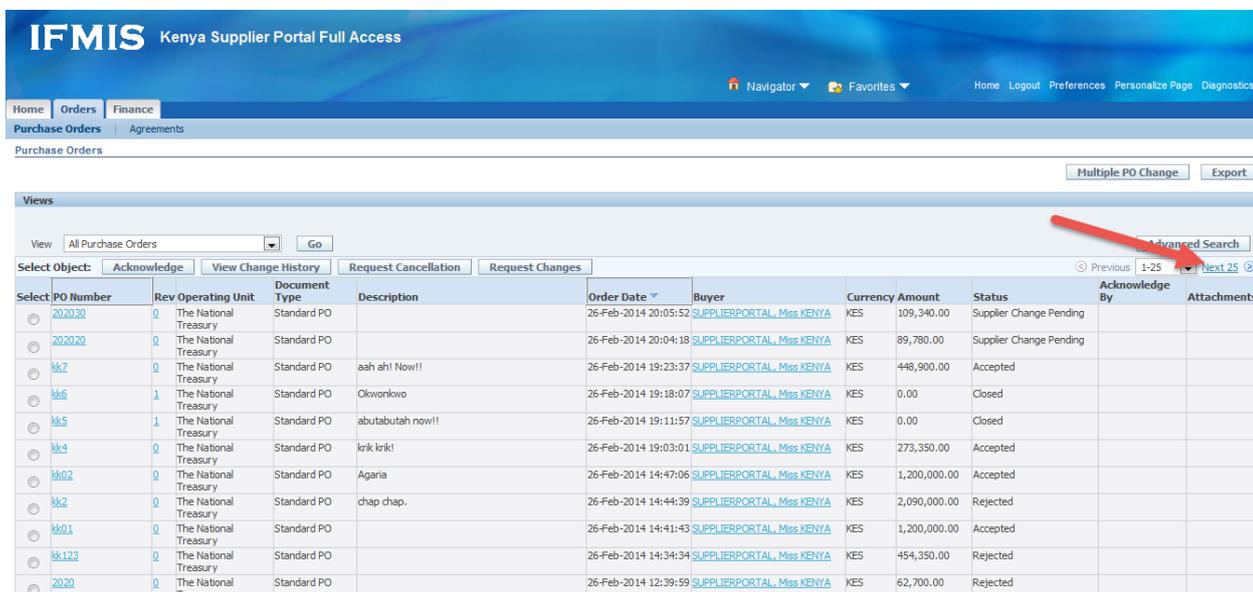
- Overview of the Orders tab and summary information
- Review of views related to Purchase Orders
- Access to Purchase Agreements information

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.

IFMIS Kenya Supplier Portal Full Access

Home Orders Finance

Purchase Orders | Agreements

Purchase Orders

Multiple PO Change Export

Views

View All Purchase Orders Go Advanced Search

Select Object: Acknowledge View Change History Request Cancellation Request Changes

Previous 25 26-29 of 29 Next

Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
<input type="radio"/>	PO0000201402	0	The National Treasury	Standard PO	Purchase of laptops	07-Jan-2014 16:43:39	KIMWELE, Mr. CHARLES KYAMBATI	KES	26,583,000.00	Open		
<input type="radio"/>	PO00000003	0	The National Treasury	Standard PO	Purchase of laptops	19-Dec-2013 17:25:57	KIMWELE, Mr. CHARLES KYAMBATI	KES	3,000.00	Open		
<input type="radio"/>	5401	0	The National Treasury	Standard PO	Test Test	02-Dec-2013 07:23:31	KIMWELE, Mr. CHARLES KYAMBATI	KES	4,000.00	Supplier Change Pending		
<input type="radio"/>	34500	0	The National Treasury	Standard PO	Purchase of laptops	02-Dec-2013 07:22:58	KIMWELE, Mr. CHARLES KYAMBATI	KES	3,000.00	Supplier Cancellation Pending		

Multiple PO Change Export

About this Page Privacy Statement Home Orders Finance Home Logout Preferences Personalize Page Diagnostics Copyright (c) 2008, Oracle. All rights reserved.

The window is refreshed to display the next 25 records.

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

IFMIS Kenya Supplier Portal Full Access

Home Orders Finance

Purchase Orders | Agreements

Purchase Orders

Multiple PO Change Export

Views

View All Purchase Orders Go Advanced Search

Select Object: Acknowledge View Change History Request Cancellation Request Changes

Previous 1-25 of 29 Next 4

Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
<input type="radio"/>	202030	0	The National Treasury	Standard PO		26-Feb-2014 20:05:52	SUPPLIERPORTAL, Miss KENYA	KES	109,340.00	Supplier Change Pending		
<input type="radio"/>	202020	0	The National Treasury	Standard PO		26-Feb-2014 20:04:18	SUPPLIERPORTAL, Miss KENYA	KES	89,780.00	Supplier Change Pending		
<input type="radio"/>	kk7	0	The National Treasury	Standard PO	aah ah! Now!!	26-Feb-2014 19:23:37	SUPPLIERPORTAL, Miss KENYA	KES	448,900.00	Accepted		
<input type="radio"/>	kk6	1	The National Treasury	Standard PO	Okwonkwo	26-Feb-2014 19:18:07	SUPPLIERPORTAL, Miss KENYA	KES	0.00	Closed		
<input type="radio"/>	kk5	1	The National Treasury	Standard PO	abutabutah now!!	26-Feb-2014 19:11:57	SUPPLIERPORTAL, Miss KENYA	KES	0.00	Closed		
<input type="radio"/>	kk4	0	The National Treasury	Standard PO	krik krik!	26-Feb-2014 19:03:01	SUPPLIERPORTAL, Miss KENYA	KES	273,350.00	Accepted		
<input type="radio"/>	kk02	0	The National Treasury	Standard PO	Agania	26-Feb-2014 14:47:06	SUPPLIERPORTAL, Miss KENYA	KES	1,200,000.00	Accepted		
<input type="radio"/>	kk2	0	The National Treasury	Standard PO	chap chap.	26-Feb-2014 14:44:39	SUPPLIERPORTAL, Miss KENYA	KES	2,090,000.00	Rejected		
<input type="radio"/>	kk01	0	The National Treasury	Standard PO		26-Feb-2014 14:41:43	SUPPLIERPORTAL, Miss KENYA	KES	1,200,000.00	Accepted		
<input type="radio"/>	kk123	0	The National Treasury	Standard PO		26-Feb-2014 14:34:34	SUPPLIERPORTAL, Miss KENYA	KES	454,350.00	Rejected		
<input type="radio"/>	2020	0	The National Treasury	Standard PO		26-Feb-2014 12:39:59	SUPPLIERPORTAL, Miss KENYA	KES	62,700.00	Rejected		

Done

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

5- Click the indicator next to **Order Date** to reverse the sequence.

IFMIS Kenya Supplier Portal Full Access

Home Orders Finance

Purchase Orders Agreements

Purchase Orders

Multiple PO Change Export

Views

View All Purchase Orders Go

Advanced Search

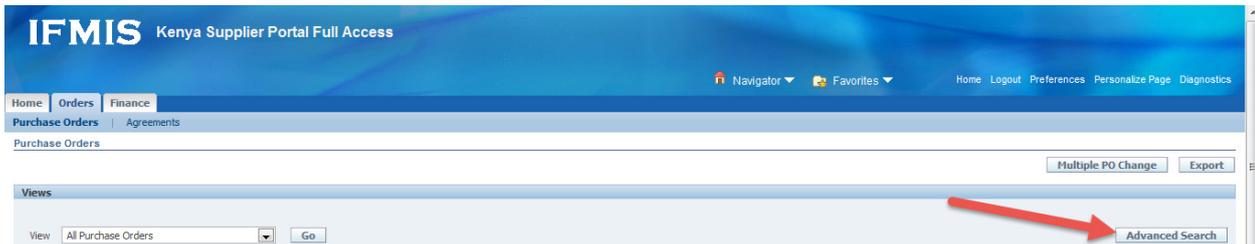
Select Object: Acknowledge View Change History Request Cancellation Request Changes

Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Buyer	Currency	Amount	Status	Acknowledge By	Attachments
<input type="radio"/>	34500	0	The National Treasury	Standard PO	Purchase of laptops	02-Dec-2013 07:22:58	KIMWELE, Mr. CHARLES KYAMBATI	KES	3,000.00	Supplier Cancellation Pending		
<input type="radio"/>	5401	0	The National Treasury	Standard PO	Test Test	02-Dec-2013 07:23:31	KIMWELE, Mr. CHARLES KYAMBATI	KES	4,000.00	Supplier Change Pending		
<input type="radio"/>	PO0000003	0	The National Treasury	Standard PO	Purchase of laptops	19-Dec-2013 17:25:57	KIMWELE, Mr. CHARLES KYAMBATI	KES	3,000.00	Open		
<input type="radio"/>	PO0000201402	0	The National Treasury	Standard PO	Purchase of laptops	07-Jan-2014 16:43:39	KIMWELE, Mr. CHARLES KYAMBATI	KES	26,583,000.00	Open		
<input type="radio"/>	PO0000201403	0	The National Treasury	Standard PO	Purchase of laptops	07-Jan-2014 16:44:54	KIMWELE, Mr. CHARLES KYAMBATI	KES	26,583,000.00	Open		
<input type="radio"/>	PO0000201404	0	The National Treasury	Standard PO	Purchase of laptops	07-Jan-2014 16:46:19	KIMWELE, Mr. CHARLES KYAMBATI	KES	26,583,000.00	Open		
<input type="radio"/>	PO0000201408	0	The National Treasury	Standard PO	Purchase of laptops	07-Jan-2014 17:15:30	KIMWELE, Mr. CHARLES KYAMBATI	KES	26,583,000.00	Supplier Cancellation Pending		
<input type="radio"/>	PO0000201407	0	The National Treasury	Standard PO	Purchase of laptops	07-Jan-2014 17:15:53	KIMWELE, Mr. CHARLES KYAMBATI	KES	26,583,000.00	Open		
<input type="radio"/>	PO08JAN2014001	0	The National Treasury	Standard PO		08-Jan-2014 11:40:24	KIMWELE, Mr. CHARLES KYAMBATI	KES	454,350.00	Supplier Cancellation Pending		
<input type="radio"/>	PO09JAN2014004	0	The National Treasury	Standard PO	PRC LIMITED002	09-Jan-2014 13:23:08	KIMWELE, Mr. CHARLES KYAMBATI	KES	454,350.00	Supplier Cancellation Pending		
<input type="radio"/>	PO09JAN2014005	0	The National Treasury	Standard PO	PRC LIMITED0005 TEST Acceptance	09-Jan-2014 16:50:23	KIMWELE, Mr. CHARLES KYAMBATI	KES	4,543,500.00	Rejected		

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.

Advanced Search

Specify parameters and values to filter the data that is displayed in your results set.

Show table data when all conditions are met.

Show table data when any condition is met.

PO Number is

Document Type is

Order Date is

Ship-To Location is

Go Clear Add Another Acknowledgement Status Add

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.

Advanced Search

Specify parameters and values to filter the data that is displayed in your results set.

Show table data when all conditions are met.
 Show table data when any condition is met.

PO Number is

Document Type is

Order Date is

Ship-To Location is

Go Clear Add Another Acknowledgement Status Add

Select Object: Acknowledge View Change History Request Cancellation Request Changes

Select PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Currency	Amount	Status	Acknowledge By	Attachments
020004	0	The National Treasury	Standard PO	purchase of computer	16-Jun-2014 12:31:41	KES	73,170.00	Accepted		

Search results are displayed.

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

IFMIS Kenya Supplier Portal Full Access

Home Orders Finance

Purchase Orders Agreements

Orders: Purchase Orders >

Standard Purchase Order : kk7, 0 (Total KES 448,900.00)
 Currency=KES

Actions View Change History Go Export

Order Information

General	Terms and Conditions	Summary
Total 448,900.00 Supplier PRC LIMITED Supplier Site OLDOWYO Address ENAPAI BUILDING ENAPAI AVENUE PO BOX 123 RONGAI 00200 Buyer SUPPLIERPORTAL, Miss KENYA Order Date 26-Feb-2014 19:23:37 Description aah ahi flow! Status Accepted Reason Note to Supplier Operating Unit The National Treasury Sourcing Document Supplier Order Number Attachments None	Payment Terms IMMEDIATE Carrier FOB Freight Terms Shipping Control Ship-To Address Address P.O.Box 40112 NAIROBI, Bill-To Address Address P.O.Box 40112 NAIROBI,	Total 448,900.00 Payment Status Not Paid Received In Process Invoiced In Process

IFMIS Kenya Supplier Portal Full Access

Home Orders Finance

Purchase Orders Agreements

Change History for Standard Purchase Order : kk7
 Currency=KES

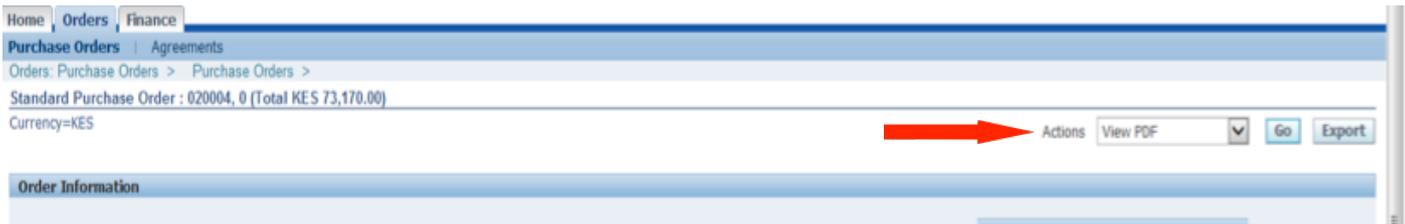
Indicates new values
 --- Indicates cancellation

Details	Request Date	Line	Shipment	Item	Supplier	Description	Qty	UOM	Price / Rate	Amount	Promised Date	Need-By Date	Start Date	End Date	Supplier Order Number	Supplier Order Line Number	Additional Changes	Cancellation Split Request	Response	
Show	26-Feb-2014 19:25:11																	No	No	Accepted

Return to Orders : Purchase Orders

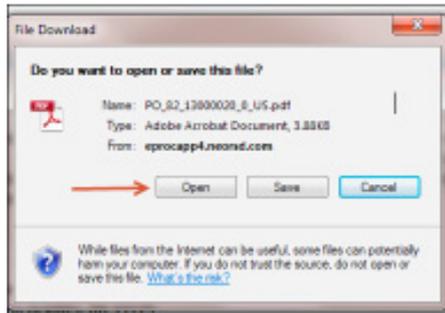
All **Change Order** history is displayed for the order.

7- Click the **Ok** button to close the window.



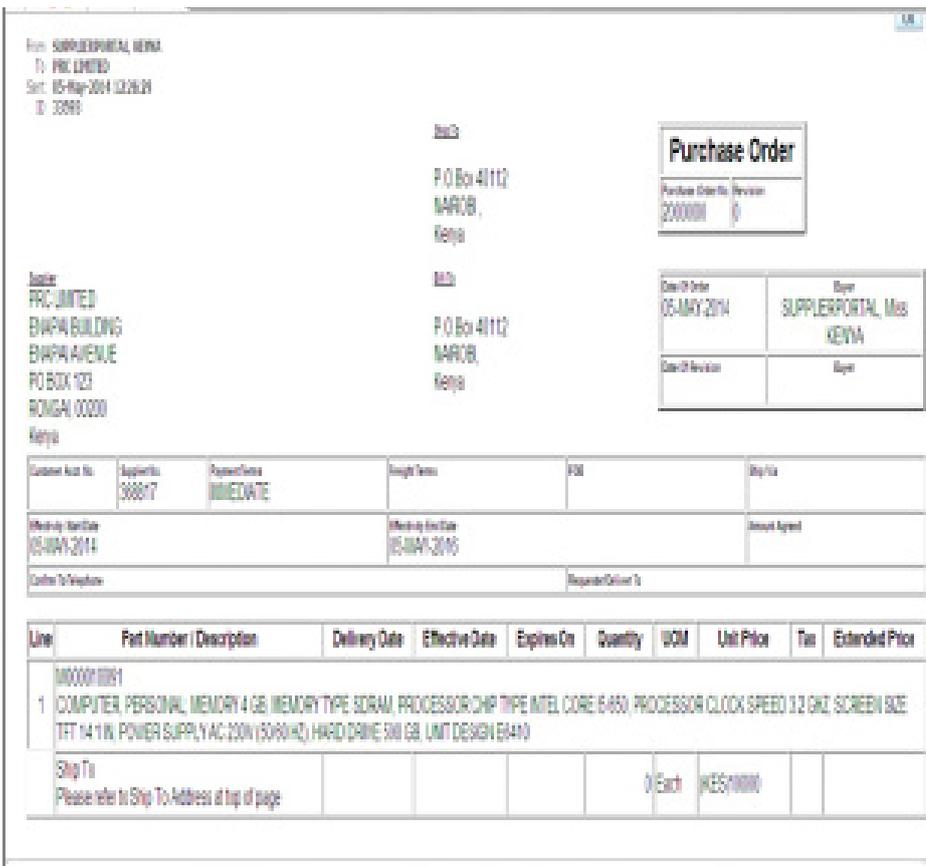
Returning to the **Actions** box:

- 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.

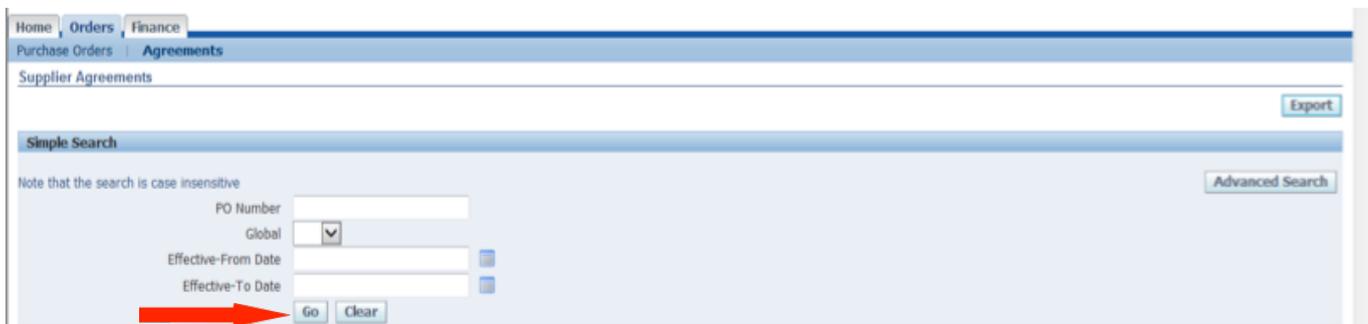
- 11- Use the **File>Exit** command to exit from the PDF document.

Viewing Order Agreements

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

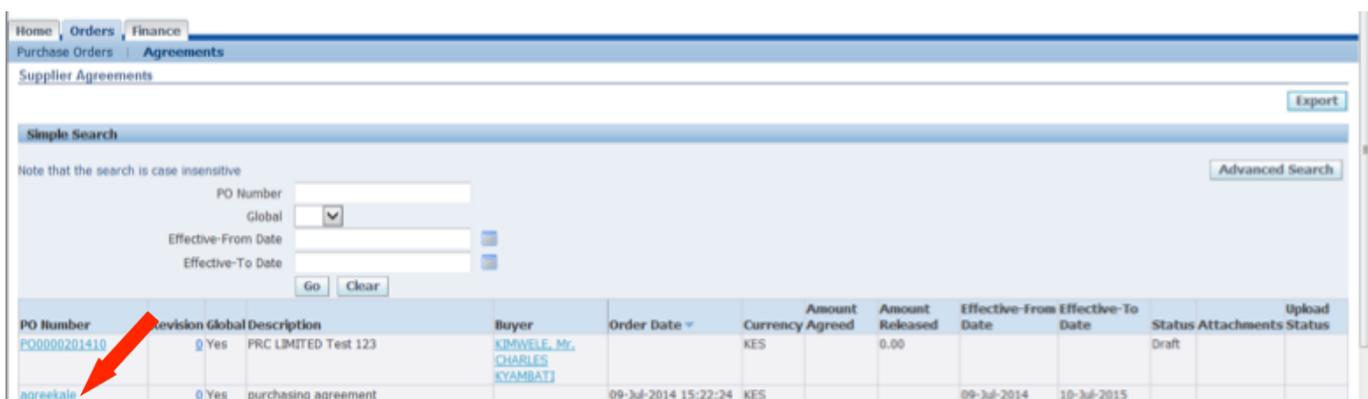


1- Click the **Agreements** link.



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.

Home | Orders | Finance

Purchase Orders | **Agreements**

PO Number: 2000000
 Revision: 0
 Description: isupp test
 Currency: KES
 Amount Released: 0.00
 Global: Yes
 Effective End Date: 05-May-2016

Approved Date: 05-May-2014 12:26:27
 Supplier: PRC LIMITED
 Buyer: SUPPLIERPORTAL, Miss KENYA
 Amount Agreed:
 Status:
 Effective Start Date: 05-May-2014

Releases

PO Number	Revision	Status	Order Date	Currency	Amount
No results found.					

Home | Orders | Finance | Home | Logout | Preferences

Detail information for the Agreement is displayed, including all **Releases** associated with the Agreement.

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

Home | Orders | Finance

Purchase Orders | **Agreements**

Supplier Agreements Export

Simple Search

Note that the search is case insensitive Advanced Search

PO Number:
 Global:
 Effective-From Date:
 Effective-To Date:

PO Number	Revision	Global	Description	Buyer	Order Date	Currency	Amount Agreed	Amount Released	Effective-From Date	Effective-To Date	Status	Attachments	Upload Status
P00000201410	0	Yes	PRC LIMITED Test 123	KIMWELE, Mr. CHARLES KYAMBATI		KES		0.00			Draft		
agreekale	0	Yes	purchasing agreement		09-Jul-2014 15:22:24	KES			09-Jul-2014	10-Jul-2015			
agreementtest	0	Yes	agreement for testing		27-Jun-2014 11:40:37	KES			27-Jun-2014	27-Jun-2015			
agreement202	0	Yes	testing		24-Jun-2014 09:01:12	KES			24-Jun-2014	24-Jun-2015			
testagreement01	0	Yes	testing		23-Jun-2014 15:29:17	KES							
4000000AGREEMENT	0	Yes	supply of goods		17-Jun-2014 19:34:16	KES			17-Jun-2014	17-Jun-2015			

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.

Invoice	Invoice Date	Type	Currency	Amount	Due Status	On Hold	Payment Status	Due Date	Payment	PO Number	Receipt	Attachments
RB5678	10/17/2013	Standard	USD	100.00	100.00	In-Process	Not Paid	11/15/2013		13000228		

Search results are displayed in summary for all invoices related to the PO.

4- Click the **link** under **Invoice** to view details.

Line	Type	Description	Qty	UOM	Price	Tax Included	Amount	Retainage	Status	PO Number	PO Line	PO Shipment	Buyer	Receipt
1	Item		1	EA	100.00		100.00	0.00	In-Process	13000228	1	1	Demmerie, Jennifer L	

Detail information for the invoice is displayed.

5- Note the **Payment Information** summary box.

6- Click the **Scheduled Payments** tab.

Due Date	Amount	Remaining Amount	Status	Method
11/16/2013	100.00	100.00	Not Paid	Check

Payment Schedule information for the invoice is displayed.

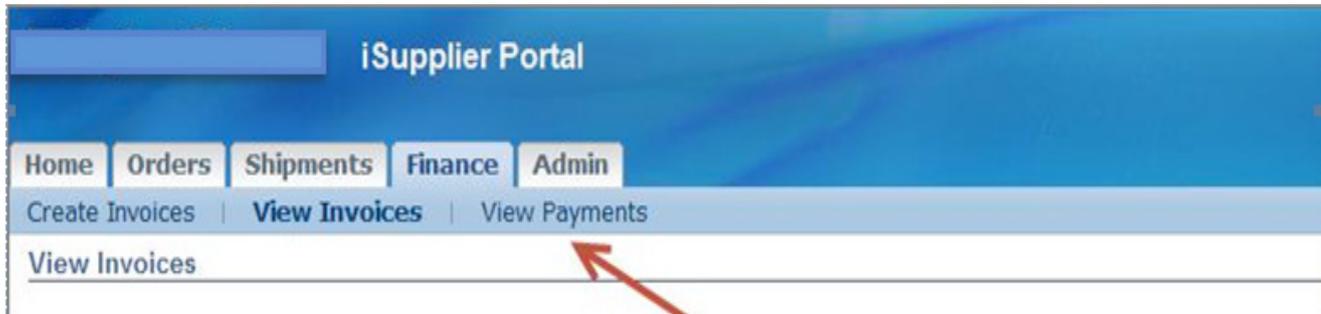
7- Click the **Hold Reasons** tab.

Hold Name	Hold Reason	Hold Date	Release Name	Release Reason	Release Date
No results found.					

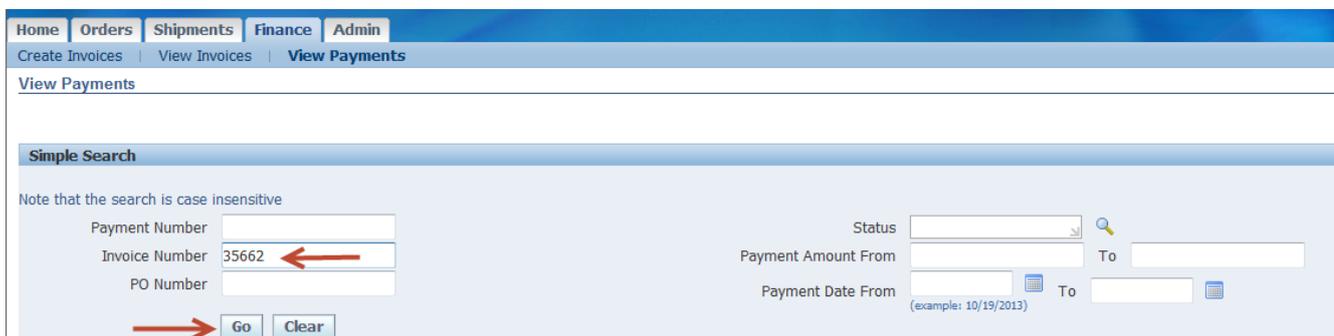
Hold and **Release** information for the invoice is displayed.

8- Click the **Return to Finance, View Invoices** link.

Payments Information

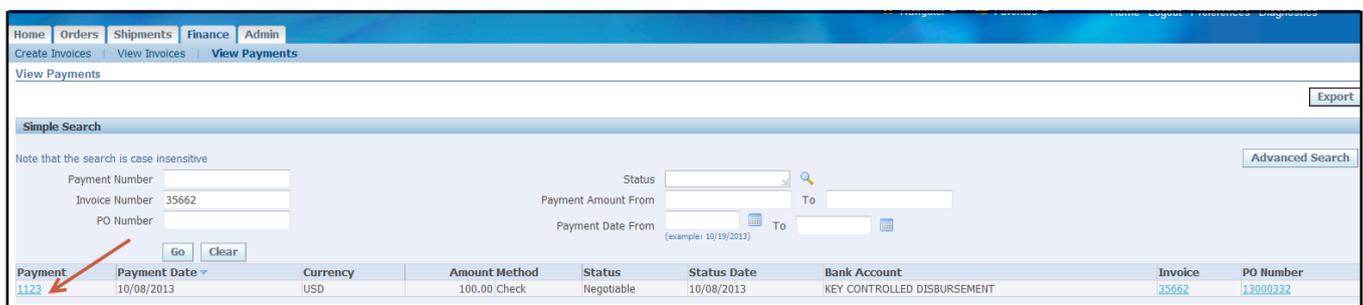


1- Click the **View Payments** link under the **Finance** tab.



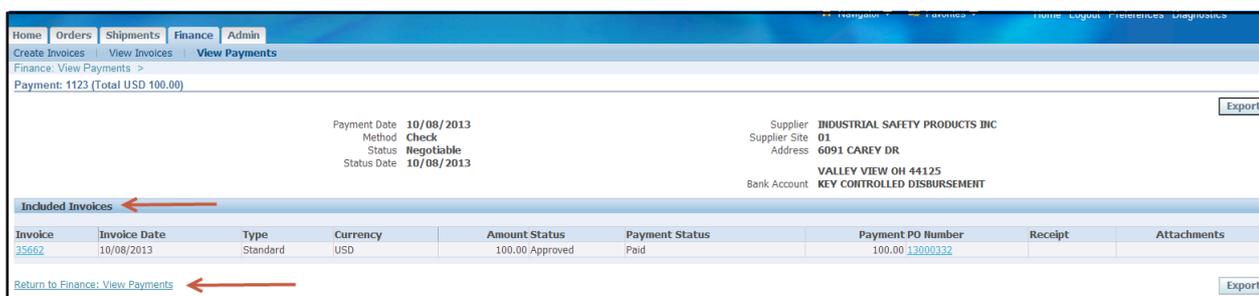
The **View Payments** window is displayed. Note the multiple criteria available for query.

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



Search results are displayed.

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



Detail information for the payment is displayed. If desired, user can drill down on details for all **Included Invoices** associated with the payment.

- 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

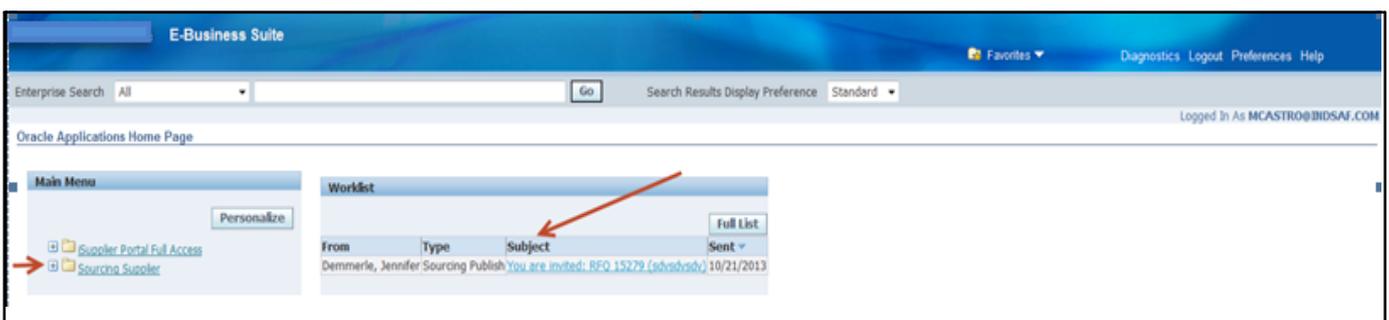
Approved supplier users to will be registered at IFMIS for access to this portal.

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

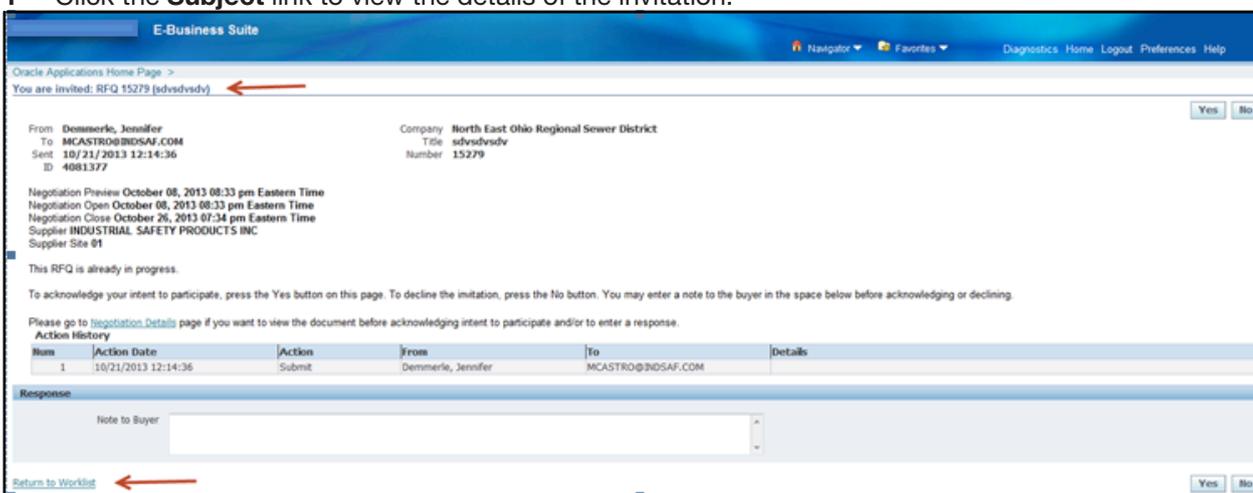


The **Oracle Applications Home Page** is displayed.

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

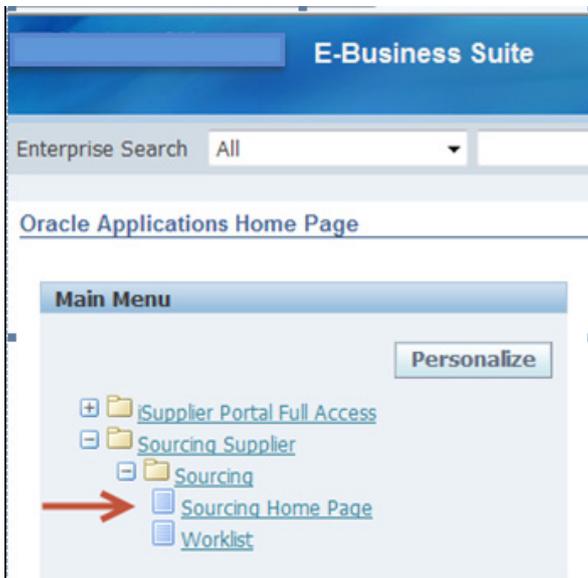
Note the **Worklist** region of this page. All **Invitations** for quote responses will be listed here.

1- Click the **Subject** link to view the details of the invitation.

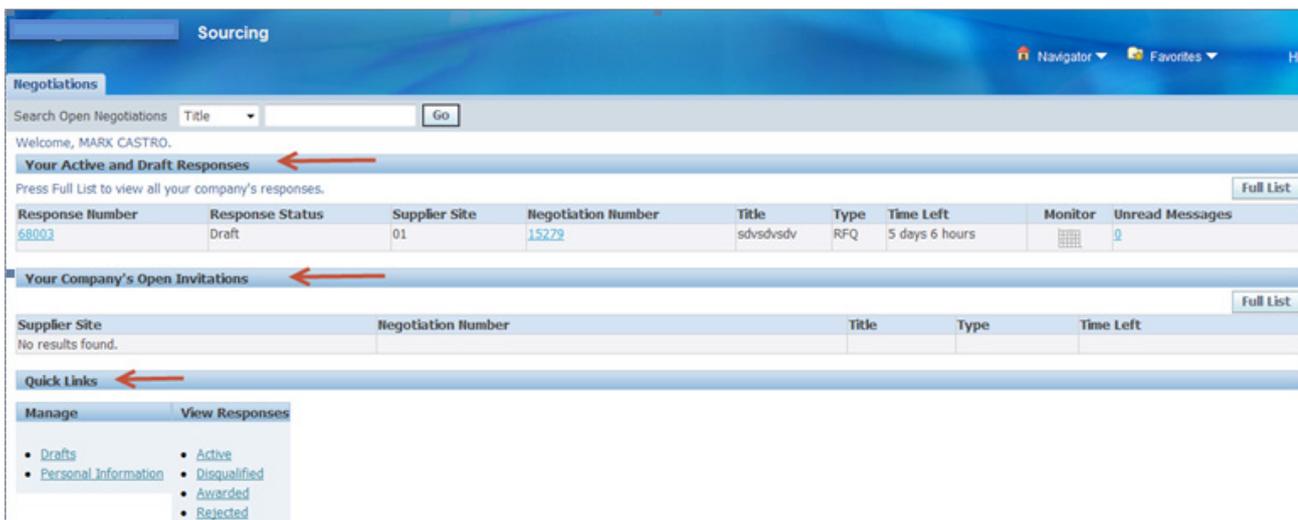


The **Invitation Details** are displayed. Supplier users can respond directly from this screen, or create a separate detailed **quote** for response.

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.

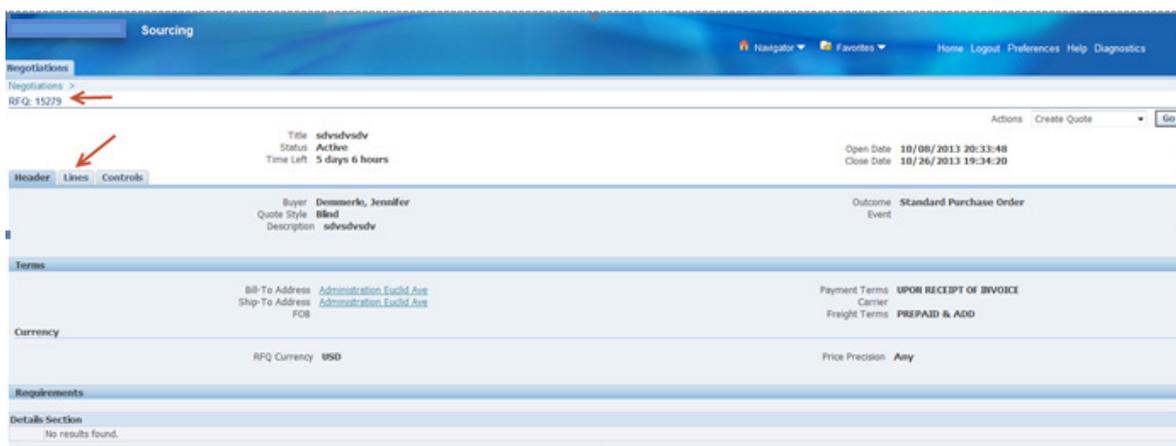
Creating Quotes

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.



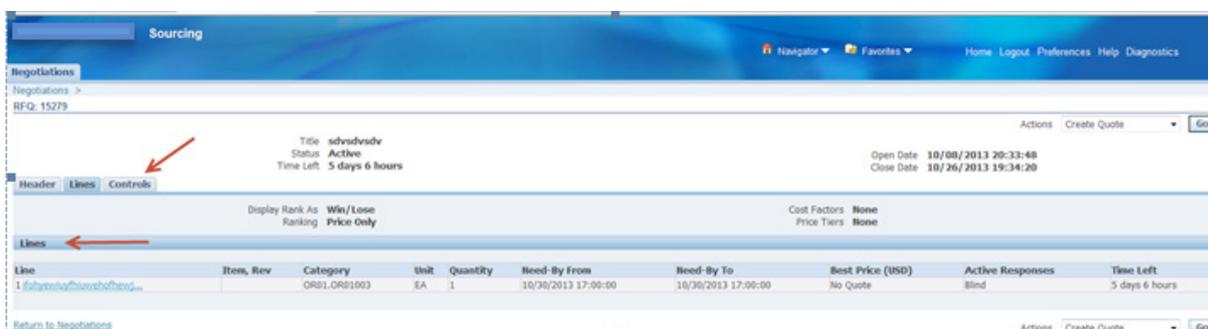
All active quote responses are listed in the **Your Active and Draft Responses** section of the Home Page.

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



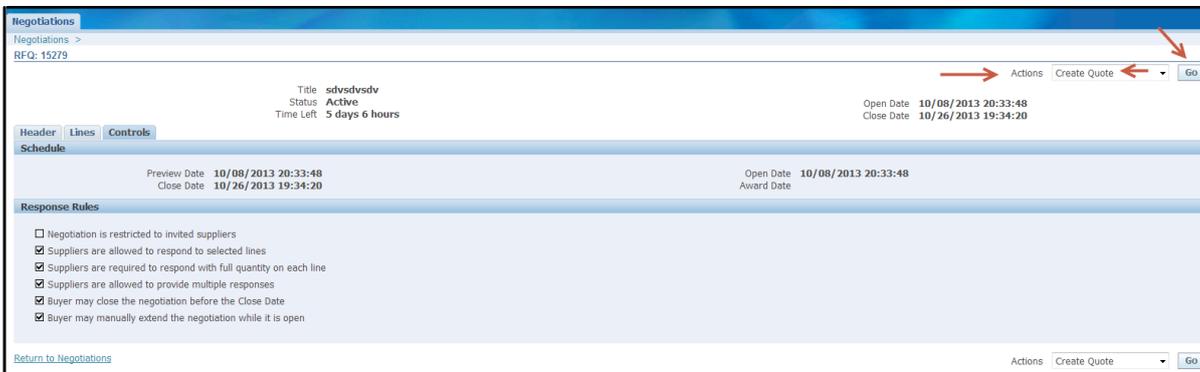
The **Negotiations** window is displayed, showing **summary** information for the RFQ.

- 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.

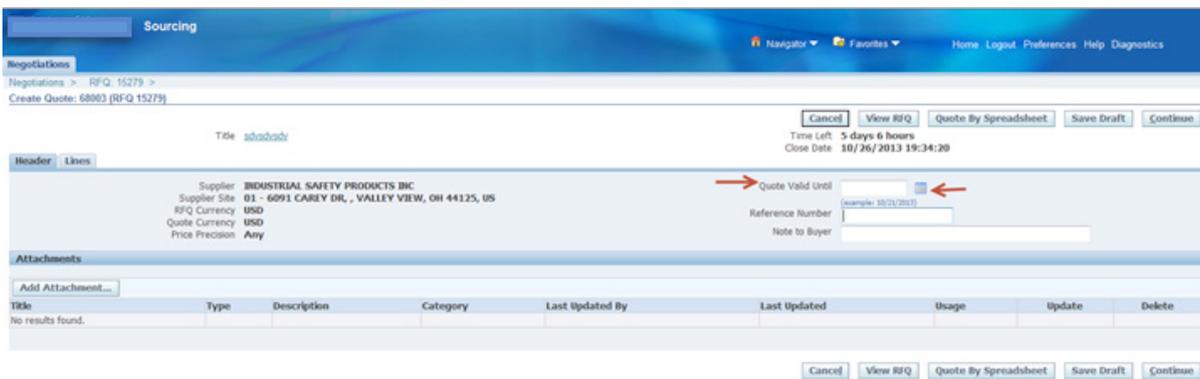


The **Controls** window is displayed, listing the **Schedule** information and all valid **Response Rules** established by the IFMIS buyer for the RFQ.

4- Review the information in this window.

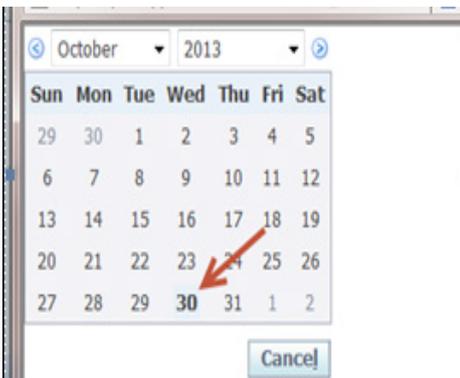
5- To initiate the creation of the quote response, select the **Create Quote** value in the **Actions** box.

6- Click the **Go** button.



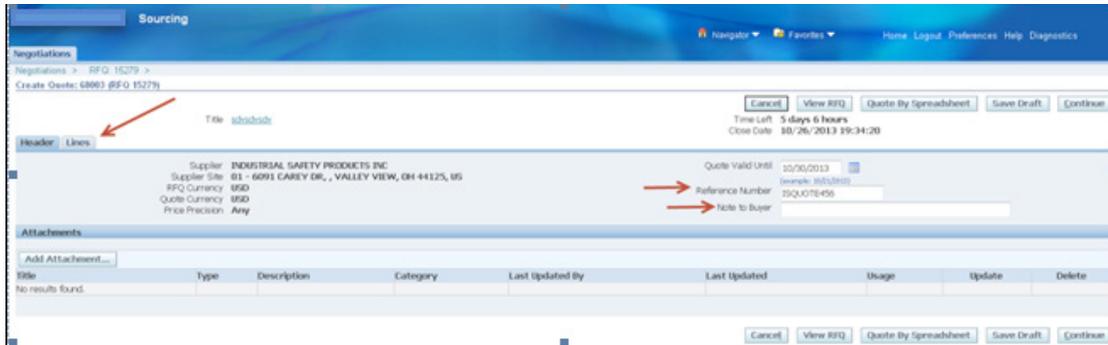
The **Create Quote** window is displayed. The window defaults to the **Header** area of the quote.

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



The **Calendar** window is displayed.

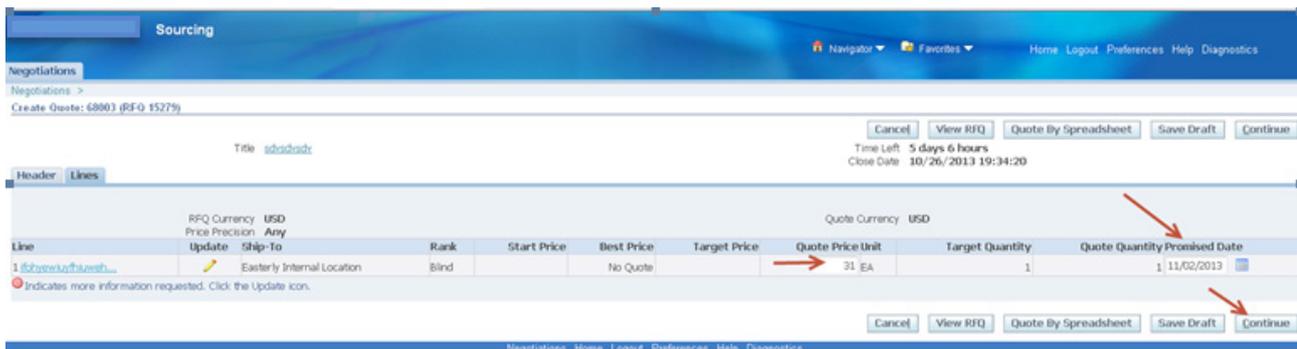
8- Select the appropriate **Day** value.



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.

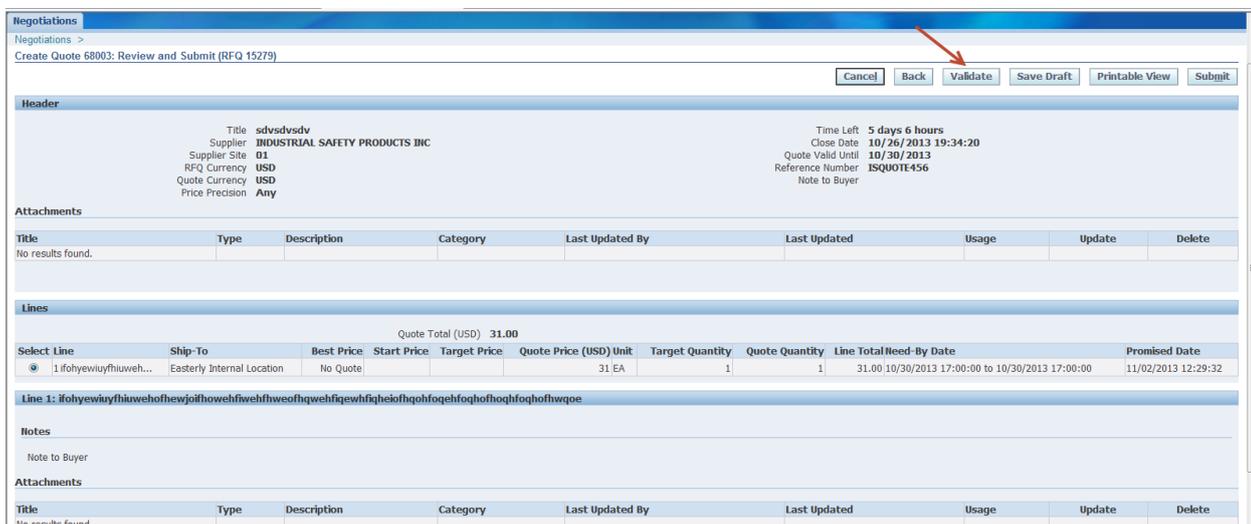
11- Click the **Lines** tab.



The **Lines** window is displayed.

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

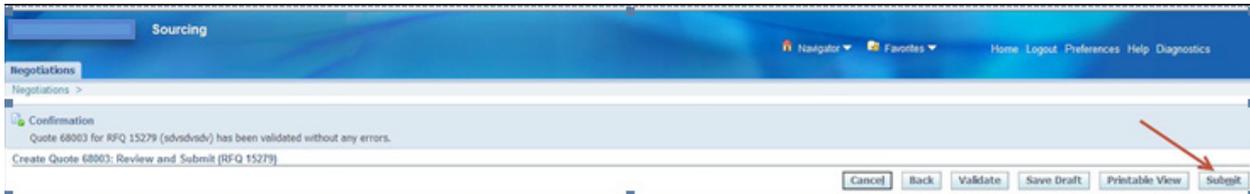
13- When complete, click the **Continue** button.



The **Review and Submit** window is displayed.

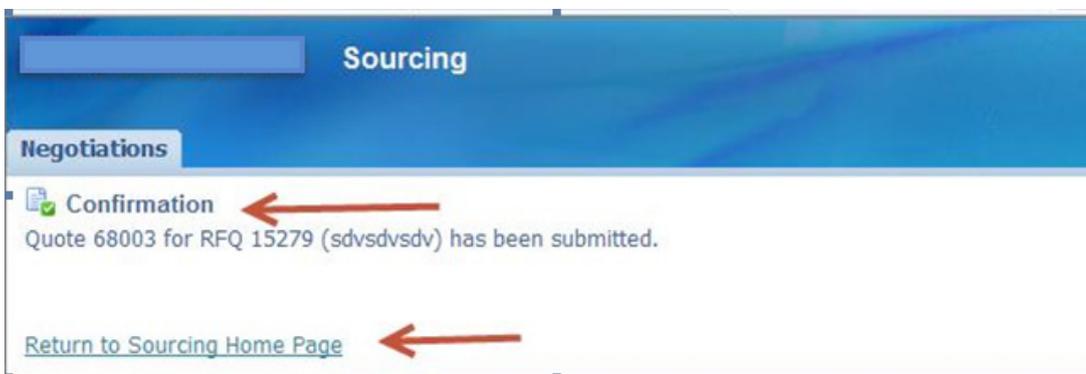
- 14- Use the **Validate** button to initiate pre-validation of the quote to ensure all required information has been entered prior to submission.

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.

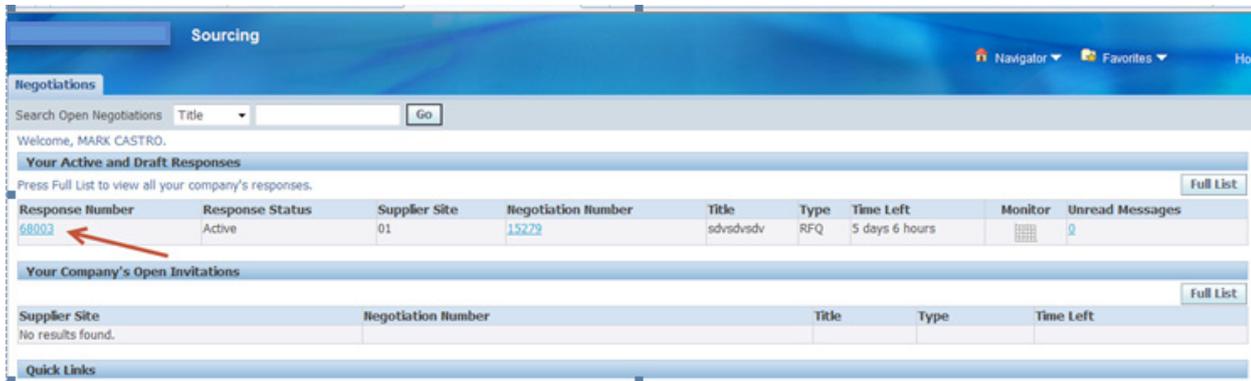


The **Confirmation** window is displayed to confirm successful submission of the quote.

- 16- Click the **Return to Sourcing Home Page** link.

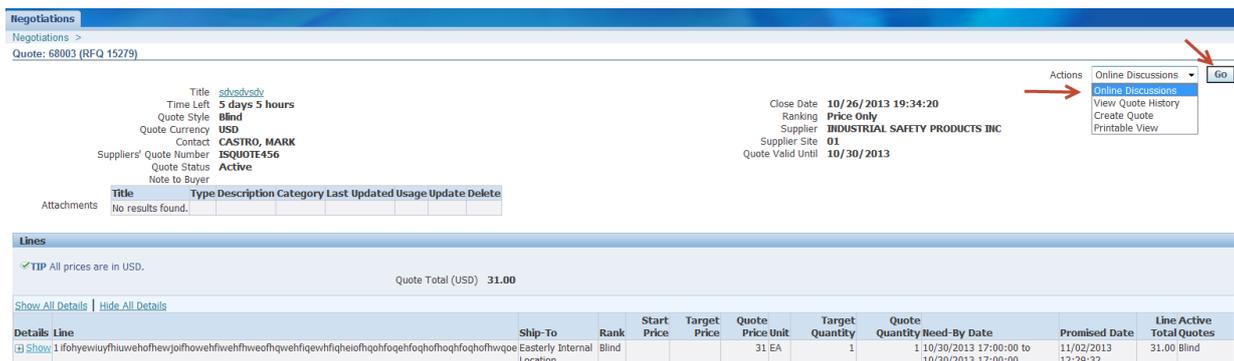
Creating Online Discussions

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.



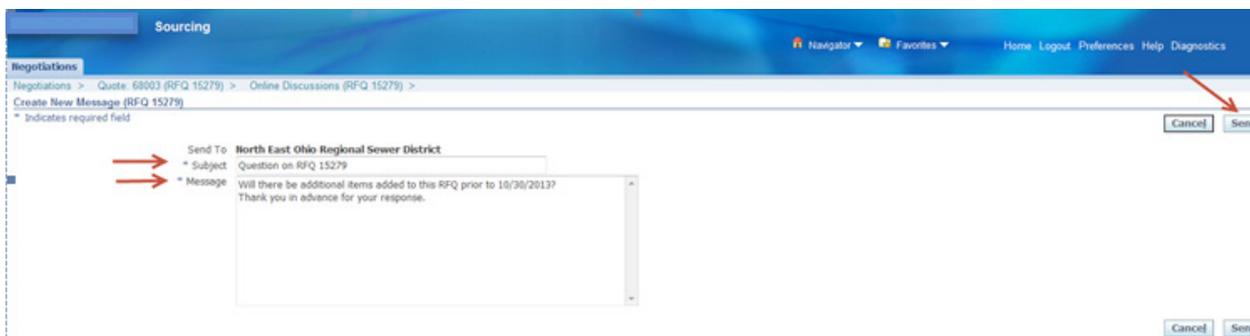
All active quote responses are listed in the **Your Active and Draft Responses** section of the Home Page.

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



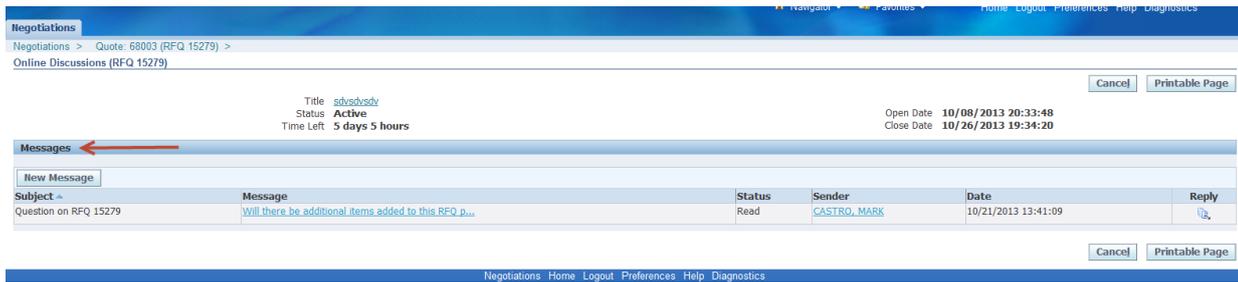
The **Quote** window is displayed.

- 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.



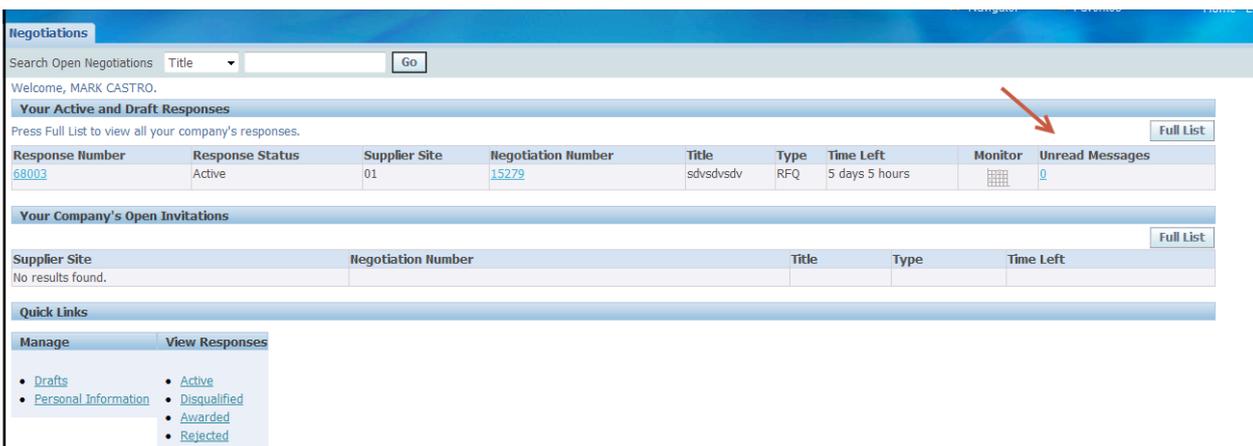
The **Create New Message** window is displayed. The **Send To** is pre-populated with the appropriate IFMIS recipient address.

- 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.

REPUBLIC OF KENYA



THE NATIONAL TREASURY



IFMIS P2P KENYA SUPPLIER PORTAL TRAINING MANUAL

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