

City Utilities of Springfield, Missouri

Purchasing Department

Strategic Sourcing On-Line Bidding Vendor Manual

June 2010

INTRODUCTION.....	3
GETTING STARTED.....	4
Logging into the System	4
Navigation Overview	8
Pop-Up Blocker Settings.....	11
View Bidding Instructions.....	11
Password Change.....	12
My System Profile.....	13
Forgotten Passwords.....	16
MAINTAIN SUPPLIER INFORMATION.....	18
Viewing and Changing Vendor Address Information.....	18
Future Effective Dated Address Information.....	23
Viewing and Changing Vendor Contact Information	26
Future Effective Dated Contact Information	30
Special Messages displayed after updating Order Address or Purchasing Contact Information.....	32
Email Notifications when changes are made to Vendor Address or Contact Information.....	33
MANAGE EVENTS AND PLACE BIDS.....	34
View Open Events and Place Bids.....	35
Entering and Submitting a Bid Response.....	44
Viewing and Editing Submitted Bids	59
My Event Activity	62
My Item Categories.....	66
MANAGE ORDERS.....	71
View Purchase Orders.....	71
View Receipts	80
REVIEW PAYMENT INFORMATION.....	84
Invoices.....	84
Payments.....	89
Account Balances	92
APPENDIX A	94
Emails.....	94
Event Invitation.....	95
Bid Notification	97
Event Cancellation	98
Event Edited	99
Bid Canceled.....	100

INTRODUCTION

The system illustrated in this manual will allow vendors of City Utilities of Springfield, Missouri, (CU) to log into City Utilities' procurement application and collaborate on procure-to-pay transactions with CU. Vendors will have the ability to bid on solicitations (Bidding Events) they have been invited to and view procurement transactions such as purchase orders, receipts and payments. Vendors will also have the ability to maintain certain vendor address and contact information.

This manual is intended to describe the navigation, pages and features available to vendors when logging into CU's procurement application (system). This manual should be used by an individual within the vendor organization as a guide to view, enter and change transactional data that is available to them.

GETTING STARTED

The following discussion will describe the steps for logging into the system, basic navigation, and password maintenance. This system is similar to other web-based applications and uses common internet based features such as hyperlinks, home pages and icons to facilitate navigation within the system. The user should be familiar with these basic web-based concepts to take full advantage of the functionality provided.

Logging into the System

City Utilities' procurement system may be accessed by either of two ways. First, the system can be accessed via the City Utilities web page at www.cityutilities.net. From the CU home page, click on the **Business** link.

The screenshot shows the City Utilities website homepage. The navigation menu includes links for Residential, Business, About Us, Transit, Rebates, and Southwest 2. The Business link is circled in black. The main content area features a large banner for a refrigerator recycling program with the text "Isn't it time your 25-year-old moved out?" and "SMART SOLUTIONS FROM CU". To the right, there is a "Latest News" section with three articles: "Public to discuss utility issues", "Springfield's utility bills are lowest in survey", and "5K Kitchen Fun Run Race Results". Below the banner, there are sections for "Residential Services" and "Business Services", each with a list of links. A "HOME Energy Audit" logo is also visible.

Choose **Purchasing** from the drop down list that is displayed to access the Purchasing Information page.

The screenshot shows the City Utilities website header with the logo and tagline "Bringing Power Home." The navigation menu includes "Residential", "Business", "About Us", "Transit", "Rebates", and "Southwest 2". A dropdown menu is open under "Business", listing "Business Overview", "Payment Options", "Start, Stop, Transfer Service", "Customer Service", "Programs & Services", and "Purchasing" (which is highlighted in orange). Below the navigation is a banner for "Act Fast if you Detect Natural Gas!". To the right, a "Latest News" section contains three articles: "Public to discuss utility issues", "Springfield's utility bills are lowest in survey", and "5K Kitchen Fun Run Race Results". Below the banner are three main service sections: "Pay My Bill", "View My Bill Online", and "Start, Stop, or Transfer Service"; "Residential Services" (listing Payment Options, Billing Options, Request Service, Customer Service, Rebates & Savings, Residential Programs, Safety Information, Outage Center, Online Newsletter, and More...); and "Business Services" (listing Payment Options, Request Service, Customer Service, Rebates & Savings, Business Programs, Safety Information, Outage Center, Landlord & Realtors, Questline Newsletter, and More...). At the bottom left is the "Interactive Energy Audit" logo.

On the Purchasing Information page, click on the **Online Bidder Login** hyperlink to access the Bidder Login page.

The screenshot shows the City Utilities website interface. At the top, there is a logo for City Utilities with the tagline "Bringing Power Home." and a search bar. The navigation menu on the left includes links for residential, business, about us, transit, rebates, newsroom, and southwest 2. The main content area is titled "Purchasing Information" and features a photograph of hands resting on a desk. To the right of the photo, there is a text block describing the Purchasing Department's responsibilities and a list of three bullet points: "Seeking, developing, and maintaining reliable sources of supply," "Utilizing procurement practices that maximize benefits to the utility and its customers," and "Obtaining items from the vendor that submits the lowest and best bid as determined by CU." Below this, a "Vendor Information" section provides instructions for becoming a vendor and includes links for "Vendor Guide" and "Vendor Application Form". At the bottom of the page, a link for "Online Bidder Login" is highlighted with a black box.

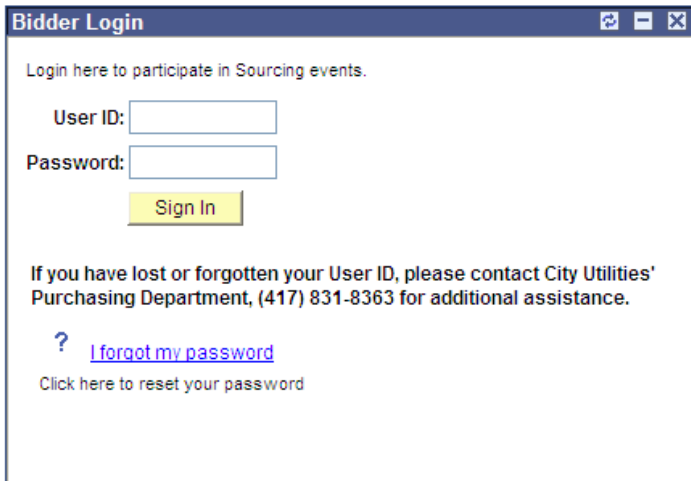
Alternatively, the Bidder Login page may be accessed by clicking on the **Event URL** that is included in the **Strategic Sourcing Event Invitation** email that a Vendor will receive when they have been invited to bid on a City Utilities' Bidding Event.

The screenshot shows an email titled "Strategic Sourcing Event Invitation". The body of the email states: "Your company has been invited to participate in a bidding event. After logging on to the system, use the information below to bid on this event. This is an automatically generated email, please do not reply." Below this, there is a section titled "Event Details" with the following information: "Event ID: CU-0000017832 Round 1 Version 1", "Event Starts: 04/07/2010 9:33AM CDT", "Event Ends: 04/10/2010 9:33AM CDT", "Event Name: Event Emails", "Contact Name: Gail Driskell", "Contact Phone: 417/831-8429", "Contact Email Address: gail.driskell@cityutilities.net", "Header Attachments: Event_Attachment.xls", and "Line Attachments: None". At the bottom of the email, there is a section titled "Event URL" with a link that says "Please click here to review and bid on this event." This link is highlighted with a black box.

Each person within the vendor’s organization that has been identified as a user of CU’s procurement system, referred to in this manual as a “**Vendor User,**” will be assigned a User ID and Password by CU.

User IDs and Passwords are case sensitive. User IDs will always be upper case. Passwords are 15 characters long.

Key in the **User ID** and **Password** and click  .




Bidder Login

Login here to participate in Sourcing events.

User ID:

Password:



If you have lost or forgotten your User ID, please contact City Utilities' Purchasing Department, (417) 831-8363 for additional assistance.

? | [forgot my password](#)

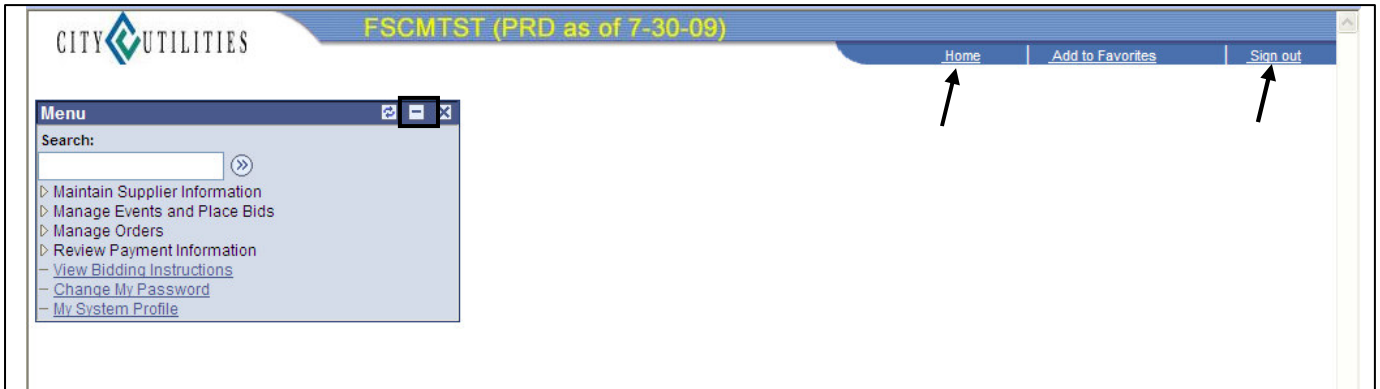
Click here to reset your password

NOTE: If a Vendor User enters a password incorrectly five times, after the fifth attempt the Vendor User’s account will automatically be locked out. If this occurs, the Vendor User will need to contact City Utilities’ Purchasing Department, (417) 831-8363 for additional assistance.

Navigation Overview



Once the Vendor User successfully logs into the application, there will be a main **Menu** displayed on the left side of the page. This menu is the starting point for navigation within the system that will allow the Vendor User to access procurement transactions.

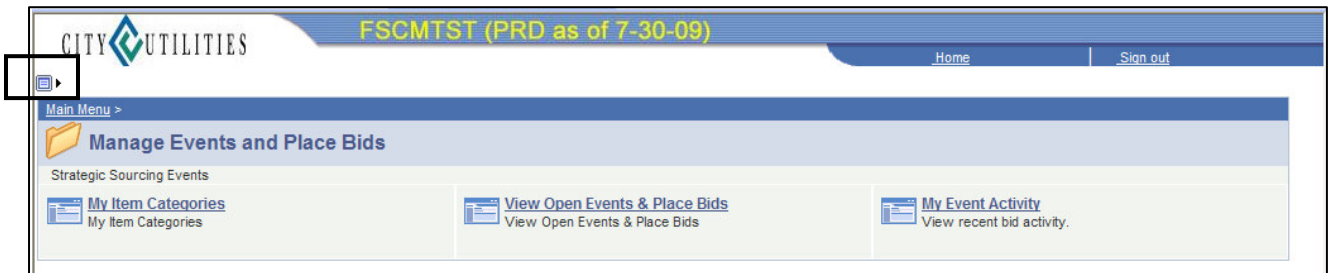
The **Menu** is separated by major functional area, each of which will allow the Vendor User to view, enter or change different types of procurement transactions, on behalf of their organization. The illustrations contained in this manual will address each of the functional areas within the **Menu** and provide direction on how to use each.



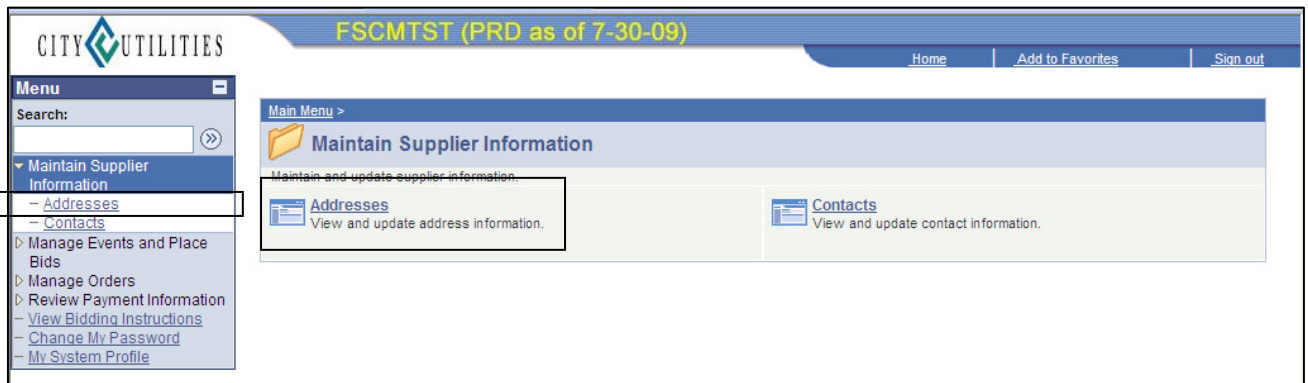
At any point when navigating through the system, the Vendor User can select the [Home](#) Hyperlink to restore the **Menu** to its original position.

At any point when in the system, the Vendor User can select [Sign out](#) to exit the system to the login page. The system will automatically sign out the Vendor User's connection after 40 minutes of inactivity.

To minimize the **Menu** to allow more viewable area on the screen, select the  icon found in the upper right hand corner of the Menu. Once the **Menu** has been collapsed (minimized), use the  icon to expand it open again.




When clicking on the hyperlink for a major functional area on the **Menu**, the area will expand within the **Menu** in the left hand window pane. This will also create a window pane with **icons** on the right hand side of the page.




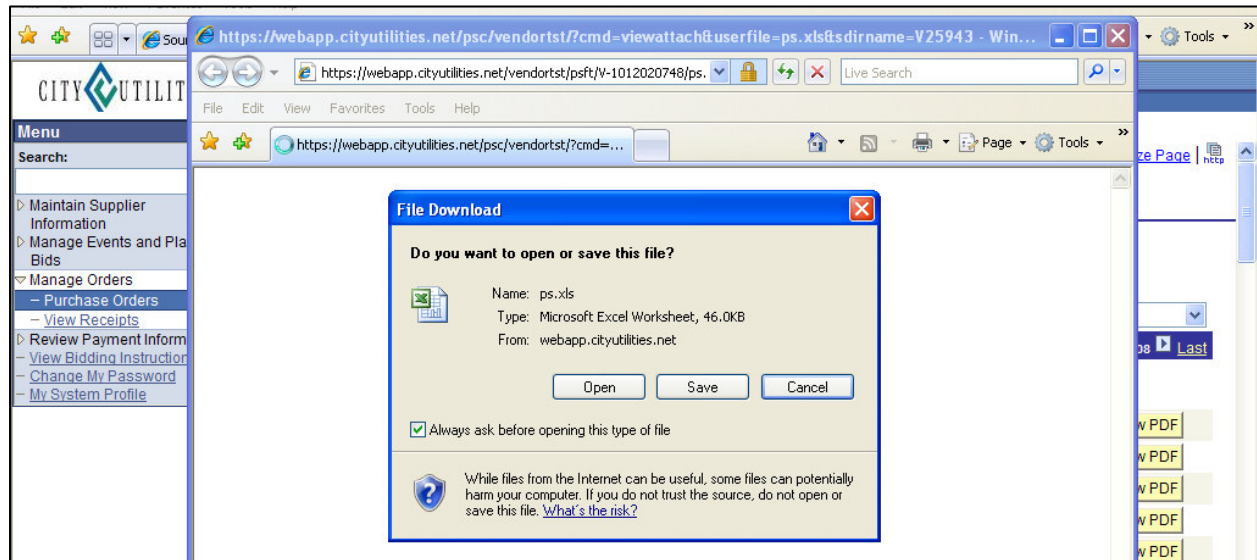
The Vendor User can navigate to the desired page in the system by clicking either the hyperlink within the **Menu** on the left, or the **icons** on the right hand side of the page.

When searching within the system, certain search results can be downloaded into Microsoft Excel.

At the top of most search result lists an Excel Download icon -  - will be available.



Clicking the  icon will allow the search results to be downloaded into an Excel format.



When the File Download pop up window appears, the Vendor User may select Open, Save or Cancel. Selecting Open will display the search results list in an Excel Format that the Vendor User can save to their local workstation if desired.

	A	B	C	D	E	F	G	H
1	Purchase Order	Status	Last Dispatched Date/Time	Lines	Total Amount			
2	0000032992	Compl	01/20/2009 9:00:13AM	1	2,628.00	USD	View PDF	
3	0000028187	Compl	01/16/2009 3:00:09PM	1	495.6	USD	View PDF	
4	0000032934	Compl	01/16/2009 11:00:05AM	1	577.5	USD	View PDF	
5	0000032842	Change Order -1	01/14/2009 3:00:07PM	1	1,382.50	USD	View PDF	
6	0000031350	Change Order -1	01/14/2009 11:00:05AM	1	301.89	USD	View PDF	
7	0000032819	Compl	01/13/2009 5:00:08PM	1	4,725.00	USD	View PDF	
8	0000032779	Compl	01/13/2009 9:00:16AM	1	3,088.50	USD	View PDF	
9	0000032764	Compl	01/12/2009 5:00:05PM	2	655.86	USD	View PDF	
10	0000032693	Compl	01/12/2009 9:00:06AM	1	300.96	USD	View PDF	

NOTE: The Vendor User may need to adjust their browser “Pop-up Blocker” settings for this feature to work correctly.

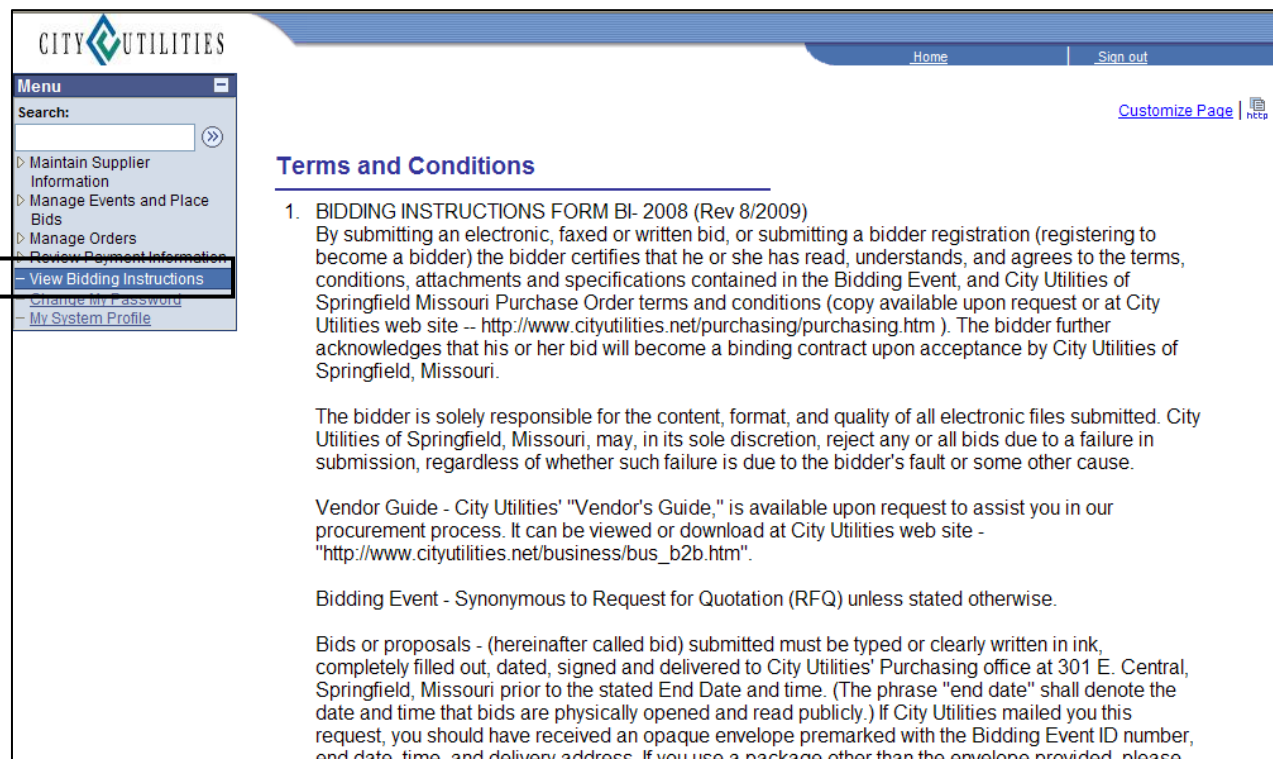
Pop-Up Blocker Settings

Several functions within the on-line procurement application will utilize “pop-up” windows, such as when viewing a Purchase Order or opening attachment files. Each individual Vendor User’s security settings may be set to prevent these “pop-up” windows from being accessible. Please be aware that the Vendor User may need to adjust their browser’s Pop-Up Blocker settings to be able to view some of the on-line bidding content.

If after adjusting pop-up blocker settings, a Vendor User is still encountering difficulty accessing or viewing information in the on-line bidding system, please contact City Utilities’ Gail Driskell, at (417) 831-8429 for further assistance.

View Bidding Instructions

City Utilities’ instructions for bidding with City Utilities can be viewed by clicking on the **View Bidding Instructions** link within the menu. These are the same instructions that are normally included with Bidding Events that are faxed to the Vendor. These same Bidding Instructions also apply to each bid submitted by a Vendor User using the on-line bidding method for submitting their bids.



The screenshot shows the City Utilities website interface. At the top left is the logo for City Utilities. To the right are links for 'Home' and 'Sign out'. Below the logo is a 'Menu' section with a search bar and several items: 'Maintain Supplier Information', 'Manage Events and Place Bids', 'Manage Orders', 'Review Payment Information', 'View Bidding Instructions' (highlighted with a red box), 'Change my Password', and 'My System Profile'. To the right of the menu is a 'Customize Page' link with a printer icon. The main content area is titled 'Terms and Conditions' and contains the following text:

1. BIDDING INSTRUCTIONS FORM BI- 2008 (Rev 8/2009)
By submitting an electronic, faxed or written bid, or submitting a bidder registration (registering to become a bidder) the bidder certifies that he or she has read, understands, and agrees to the terms, conditions, attachments and specifications contained in the Bidding Event, and City Utilities of Springfield Missouri Purchase Order terms and conditions (copy available upon request or at City Utilities web site -- <http://www.cityutilities.net/purchasing/purchasing.htm>). The bidder further acknowledges that his or her bid will become a binding contract upon acceptance by City Utilities of Springfield, Missouri.

The bidder is solely responsible for the content, format, and quality of all electronic files submitted. City Utilities of Springfield, Missouri, may, in its sole discretion, reject any or all bids due to a failure in submission, regardless of whether such failure is due to the bidder's fault or some other cause.

Vendor Guide - City Utilities' "Vendor's Guide," is available upon request to assist you in our procurement process. It can be viewed or download at City Utilities web site - "http://www.cityutilities.net/business/bus_b2b.htm".

Bidding Event - Synonymous to Request for Quotation (RFQ) unless stated otherwise.

Bids or proposals - (hereinafter called bid) submitted must be typed or clearly written in ink, completely filled out, dated, signed and delivered to City Utilities' Purchasing office at 301 E. Central, Springfield, Missouri prior to the stated End Date and time. (The phrase "end date" shall denote the date and time that bids are physically opened and read publicly.) If City Utilities mailed you this request, you should have received an opaque envelope premarked with the Bidding Event ID number, end date, time, and delivery address. If you use a package other than the envelope provided, please

Password Change

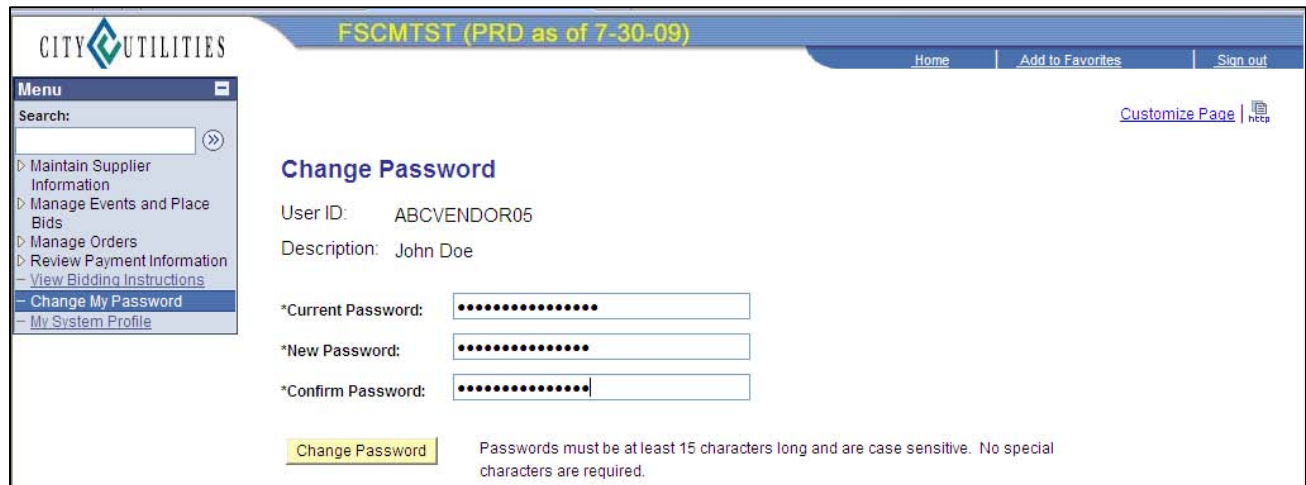
Upon initial login to the system, the Vendor User should change their password from the password originally assigned to them by CU to a password of the Vendor User's choice. Additionally, the Vendor User may change their password at any time if desired using the **Change My Password** function.

To change the password, select the **Change My Password** hyperlink from the Menu.



Provide the **Current Password** and a new password in the **New Password** and **Confirm Password** fields. Then click the **Change Password** icon.

Remember passwords are case sensitive and must be at least 15 characters long.



The Vendor User will then receive confirmation of the password change.

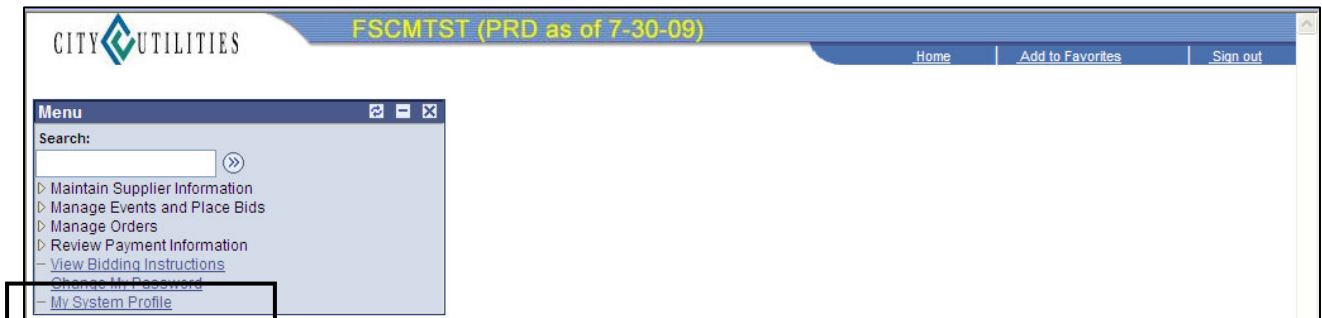


My System Profile

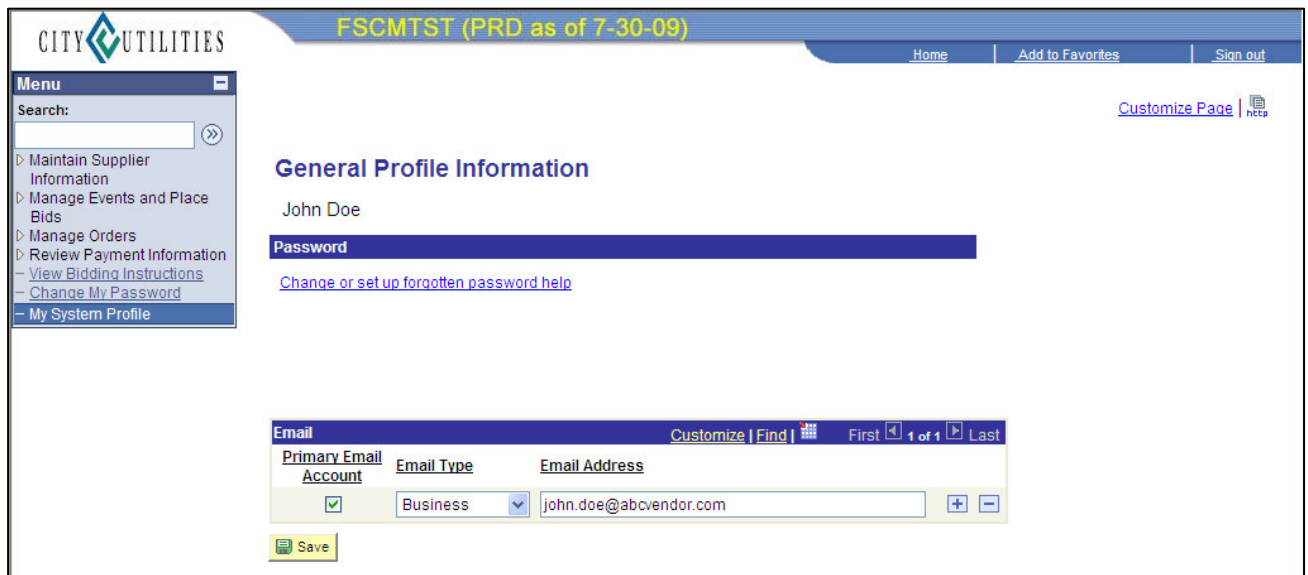
The **My System Profile** page will allow the Vendor User to maintain certain **Vendor User** related data. Available to the Vendor User on the My System Profile page is the Password Help Question which is used in the process of re-setting a password if the Vendor User forgets their password. Also available on the My System Profile page is the ability for the Vendor User to update their email address.

Upon initial login the Vendor User should navigate to the My System Profile page to input the forgotten password help question and answer.

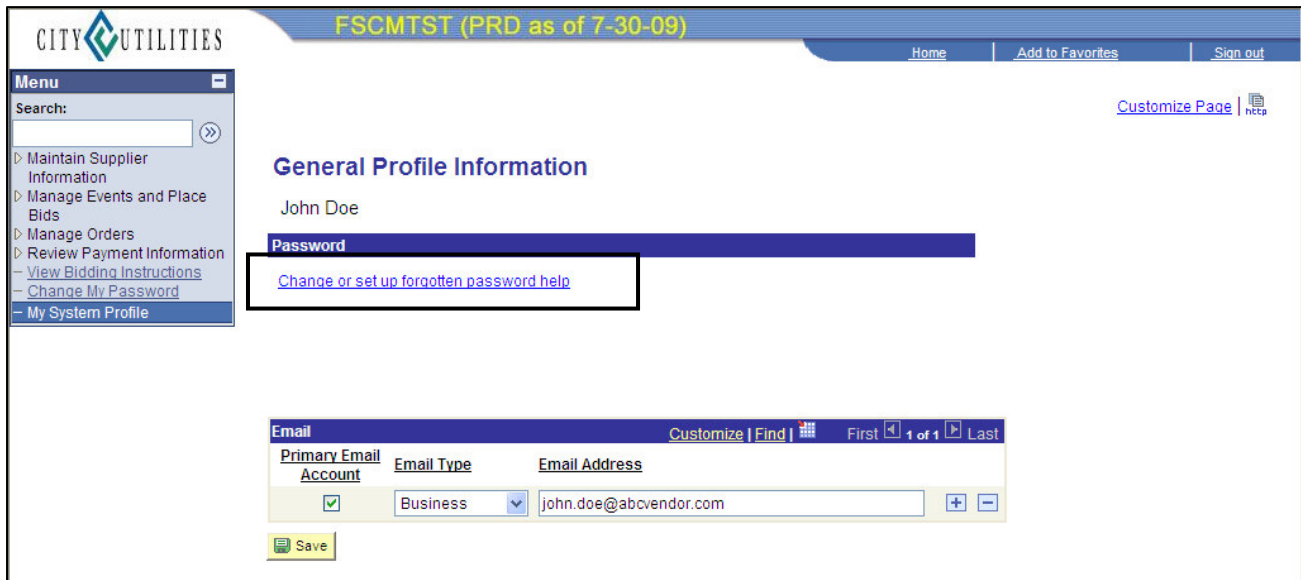
To access this page, click on the **My System Profile** hyperlink on the Menu.



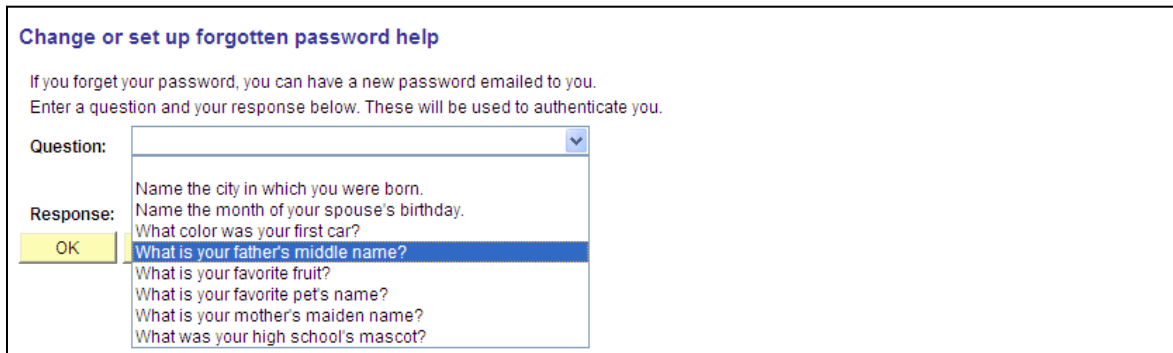
The **General Profile Information** page will be displayed.



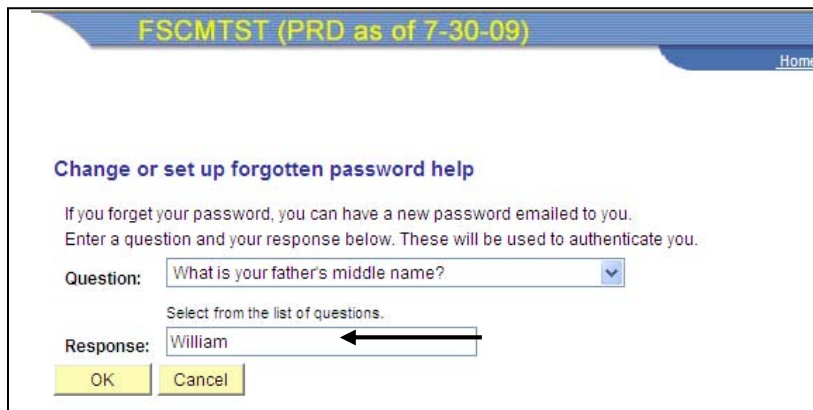
Click on the **Change or set up forgotten password help** hyperlink to choose a question and answer.




Select a **password hint question** from the drop down list.



Type in the **Response** to the password hint question that the Vendor User chose.

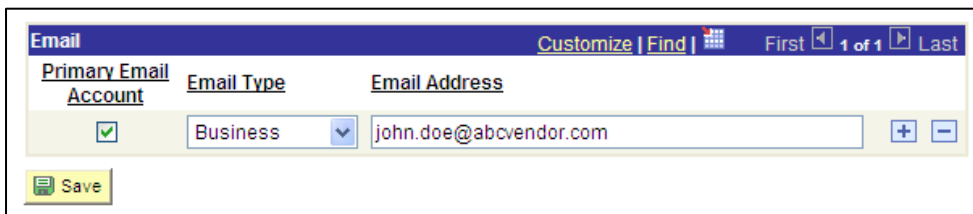


Click  to complete the password hint question and answer setup.


NOTE: If a Vendor User enters a password incorrectly five times, after the fifth attempt the Vendor User's account will automatically be locked out. If this occurs, the Vendor User will need to contact City Utilities' Purchasing Department, (417) 831-8363 for additional assistance.

The Purchasing Department will ask the Vendor User the selected password hint question and must receive the correct response for the Vendor User's account to be enabled again.

Use the **Email** section of the General Profile Information page to maintain the Vendor User's email address. The email address listed on this page is the email address for the individual Vendor User (the person). This email address will be used when the system supplies a new password to the Vendor User, for notification of any changes that have been made to the Vendor account information by any of the organization's Vendor Users, and for supplying a confirming copy of bids the Vendor User submits on-line.



Primary Email Account	Email Type	Email Address
<input checked="" type="checkbox"/>	Business	john.doe@abcvendor.com



NOTE: This Vendor User email address is NOT the main email address used by the system for sending bid solicitation notices. The organization's bid solicitation email address must be maintained in the **Maintain Supplier Information** area of the system.

When changes to the **General Profile Information** page are complete, click  to save all the changes.

Forgotten Passwords

If the Vendor User has forgotten their password, they can click the **I forgot my password** hyperlink to have the system assign a new password and have the new password emailed to the Vendor User.

Bidder Login

Login here to participate in Sourcing events.

User ID:

Password:

Sign In

If you have lost or forgotten your User ID, please contact City Utilities' Purchasing Department, (417) 831-8363 for additional assistance.

? [I forgot my password](#)
Click here to reset your password

The **Forgot My Password** page will appear. The Vendor User will be prompted to type in their User ID.

If the Vendor User has also forgotten their User ID, they will need to contact City Utilities' Purchasing, (417) 831-8363 for additional assistance.

CITY UTILITIES FSCMTST (PRD as of 7-30-09) Home Sign out

Menu Search:

Forgot My Password

If you have forgotten your password, or your password has expired, you can have a new password emailed to you.

Enter your User ID below. This will be used to find your profile, in order to authenticate you.

User ID:

Continue

After keying in the **User ID**, click **Continue** .

