

eSupplier Connection

Manual

Supply Management

October 2016

Rev. 04



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I. eSupplier Connection Overview

eSupplier Connection is a tool for suppliers to manage their accounts such as change of address and add new users, and to view their PO's, receipts, invoices, and payments in real time. Through the online portal, suppliers can view purchase order details, receiving information, and research outstanding payments without having to contact someone directly.

II. Work Instructions

A. Getting Started

1. Log In

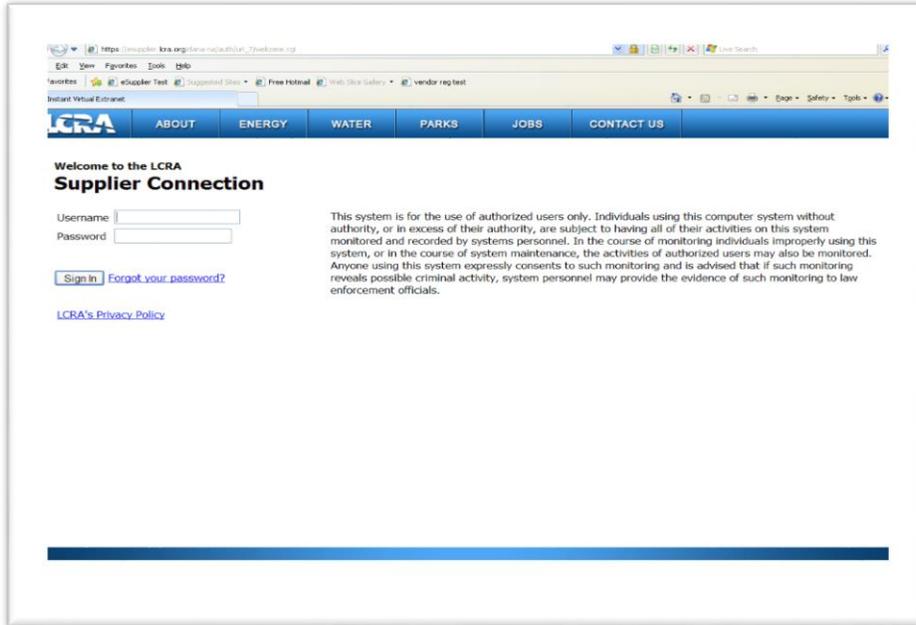
- a) Go to www.lcra.org
- b) Click on the **About** tab at the top
- c) In the navigation to the left, click **Business Opportunities with LCRA**.
- d) Click **Supplier Connection**
- e) Click **Manage Your Account** button

NOTE: If you are experiencing issues getting to the log in site, you can go directly to <https://esupplier.lcra.org>.

The screenshot shows the LCRA website interface. At the top, there is a blue header with the LCRA logo (ENERGY • WATER • COMMUNITY SERVICES) and social media icons for Facebook, Twitter, YouTube, LinkedIn, and RSS. Below the header is a navigation bar with tabs for 'About', 'Careers', 'Contact Us', and 'News'. The 'About' tab is highlighted with a red box. To the right of the navigation bar is a search bar. Below the navigation bar, the page is divided into three columns. The left column contains a list of links under the 'About' heading, with 'Business Opportunities with LCRA' and 'Supplier Connection' highlighted with red boxes. The middle column features the heading 'Business opportunities with LCRA' and a large blue button that says 'View Current Business Opportunities'. The right column contains contact information for LCRA's Supply Management department, including the address (3700 Lake Austin Blvd., Shapiro Bldg., 2nd Floor (S-213), Austin, TX 78703-3504), phone numbers (512-473-3200 or 800-776-5272), fax number (512-473-4094), and email (Supply Management). Below the contact information is a section titled 'Helpful Information' with a list of links.

- f) The **Supplier Connection** login page will open.
- g) Enter your username and password and click **Sign In**

NOTE: If you forgot your username and password, click on the link **Forgot your password?** and follow the process.

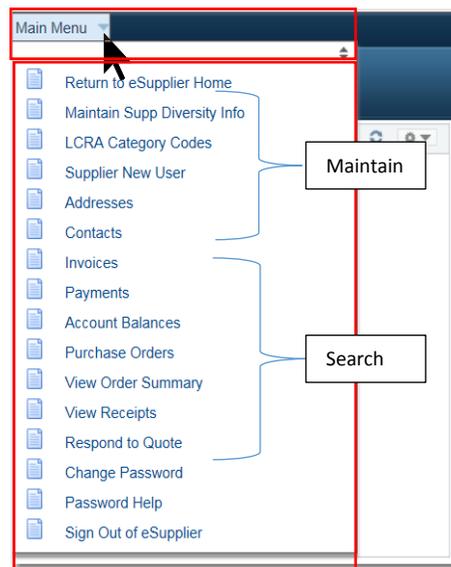
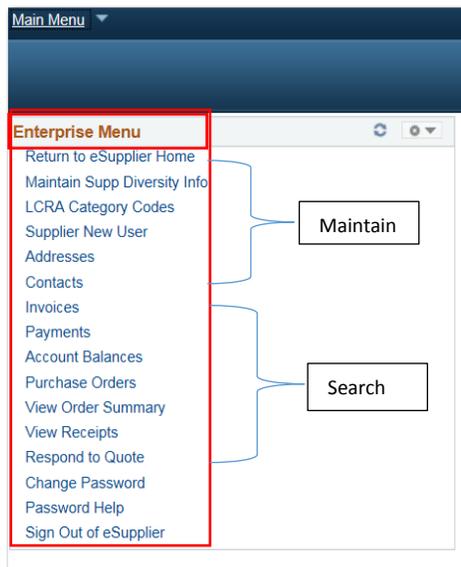


B. Navigating Through eSupplier Connection

Navigation for eSupplier can be accessed from two locations:

- **Navigation panel (Enterprise Menu)** to the left, or,
- **Main Menu** drop down in the top left corner

These provide the same options for suppliers to **maintain** their accounts (upper section), and options to **search** information about their accounts (lower section).



Breadcrumbs appear across the top of the page for navigation. Use these to return to the previous area or Main Menu rather than using the back-button.



C. Maintain Information

1. Maintain Supplier Diversity Info

- a) Click **Maintain Supp Diversity Info** link in the Navigation to the left.
- b) Update your settings related to diversity and click **Save**.

Supplier Diversity Information

Update/Display Diversity Information

o update your settings, make the changes below and then click Save.

Is company a small business? Yes No

Is company a woman owned business? Yes No

Is company a minority owned business? Yes No

Is company certified as a HUB Zone Business? Yes No

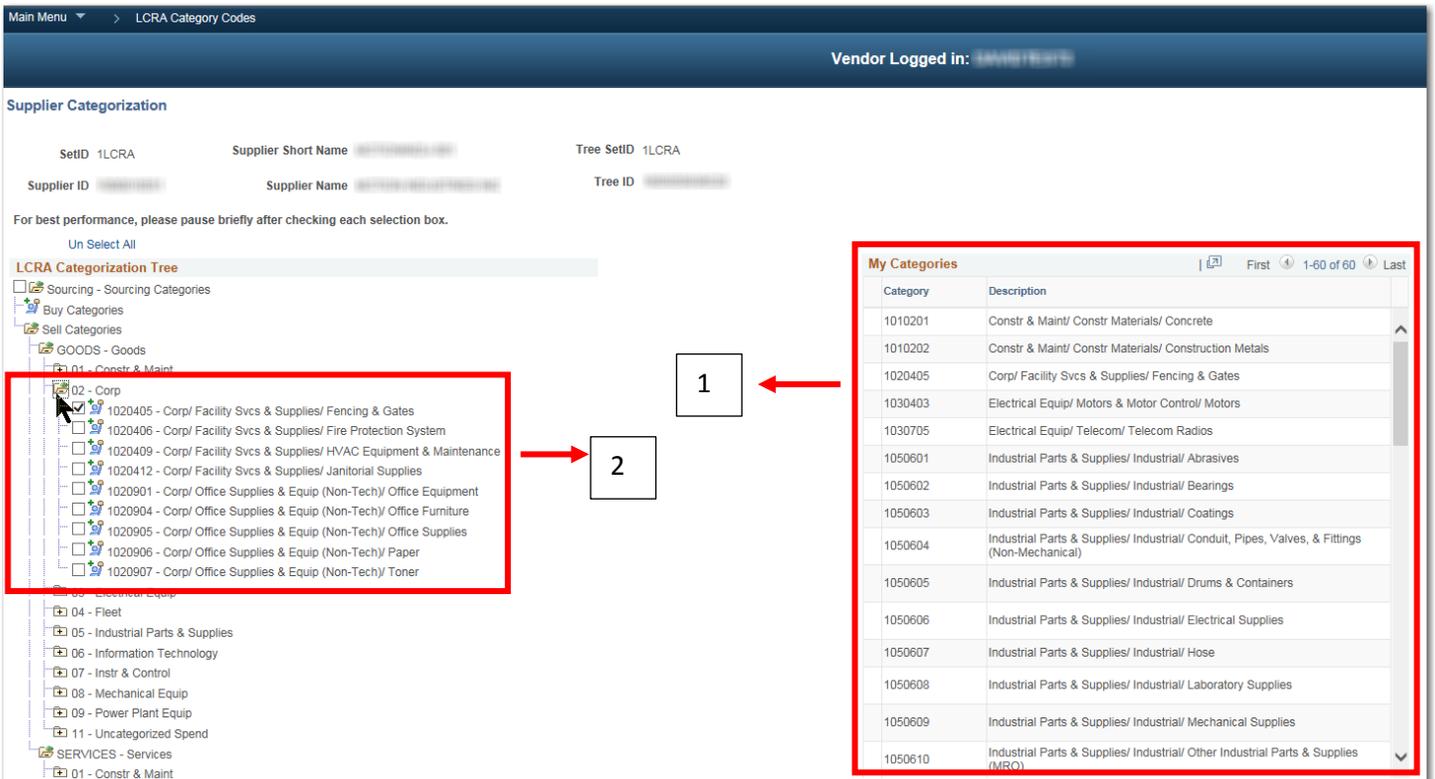
Is company a veteran owned business? Yes No

Is company a Service Disabled Veteran Owned? Yes No

Majority Owner/Stockholder Gender Majority Owner/Stockholder Ethnicity

2. LCRA Category Codes

- a) Select **LCRA Category Codes** link from the navigation to the left
- b) Click **Categorization**
- c) Review **My Categories** (1) to the right for categories associated with your business
- d) Select  next to the appropriate folder to the left to expand options (2)
- e) Select the appropriate options – they appear in your My Categories list.
- f) Click **OK** (scroll to bottom of page) and **Save** (on the next page) to save changes.



The screenshot displays the 'Supplier Categorization' interface. At the top, it shows 'Main Menu > LCRA Category Codes' and 'Vendor Logged in: [username]'. Below this, there are fields for 'SetID 1LCRA', 'Supplier Short Name', 'Tree SetID 1LCRA', 'Supplier ID', 'Supplier Name', and 'Tree ID'. A note states: 'For best performance, please pause briefly after checking each selection box.' Below the note is a 'Un Select All' link.

The 'LCRA Categorization Tree' is shown on the left, with a red box highlighting the '02 - Corp' folder and its sub-items. A red arrow points from this box to a box labeled '2'. Another red arrow points from a box labeled '1' to the 'My Categories' table on the right.

The 'My Categories' table is shown on the right, with a red box around it. It has columns for 'Category' and 'Description'. The table contains the following data:

Category	Description
1010201	Constr & Maint/ Constr Materials/ Concrete
1010202	Constr & Maint/ Constr Materials/ Construction Metals
1020405	Corp/ Facility Svcs & Supplies/ Fencing & Gates
1030403	Electrical Equip/ Motors & Motor Control/ Motors
1030705	Electrical Equip/ Telecom/ Telecom Radios
1050601	Industrial Parts & Supplies/ Industrial/ Abrasives
1050602	Industrial Parts & Supplies/ Industrial/ Bearings
1050603	Industrial Parts & Supplies/ Industrial/ Coatings
1050604	Industrial Parts & Supplies/ Industrial/ Conduit, Pipes, Valves, & Fittings (Non-Mechanical)
1050605	Industrial Parts & Supplies/ Industrial/ Drums & Containers
1050606	Industrial Parts & Supplies/ Industrial/ Electrical Supplies
1050607	Industrial Parts & Supplies/ Industrial/ Hose
1050608	Industrial Parts & Supplies/ Industrial/ Laboratory Supplies
1050609	Industrial Parts & Supplies/ Industrial/ Mechanical Supplies
1050610	Industrial Parts & Supplies/ Industrial/ Other Industrial Parts & Supplies (MRO)

3. **Supplier New User**

This allows adding additional users to supplier accounts. Requirements: Suppliers need to know their LCRA Supplier ID and Tax ID to create a new user; limit ten characters on User ID; an error will occur if this information is already in the system.

- a) Select **Supplier New Users** link from the navigation to the left
- b) Type the **Supplier ID** and **ID Number** (tax ID);
- c) Click **Add**
- d) Type the **Requested User ID** (limit 10 characters), **Description** and **Email ID** (email for the requested user)
- e) Read the **Terms of Agreement** and select the **check box** to accept the terms;
- f) Click **Submit**. The password and login instructions will be sent to the Email ID, which takes approximately 5-10 minutes.

Main Menu > Supplier New User

Register New User Accounts

Authentication

Supplier List

*Supplier ID	ID Number	
<input type="text"/>	<input type="text"/>	
<input type="button" value="Add"/>		

User Account Information ?

* Requested User ID	<input type="text"/>
Description	<input type="text"/>
* Email ID	<input type="text"/>

Terms and Conditions

Make sure you read terms of agreement fully before submitting your registration.

Click to accept the Terms of Agreement below.

[Terms of Agreement](#)

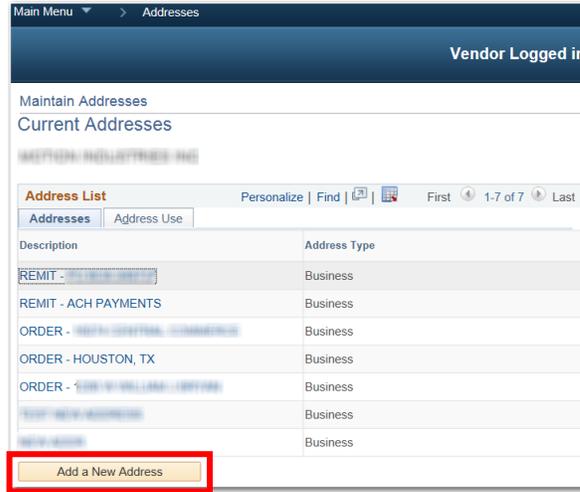
* Required field

4. Addresses

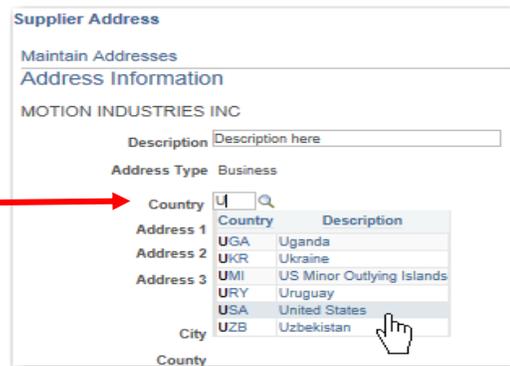
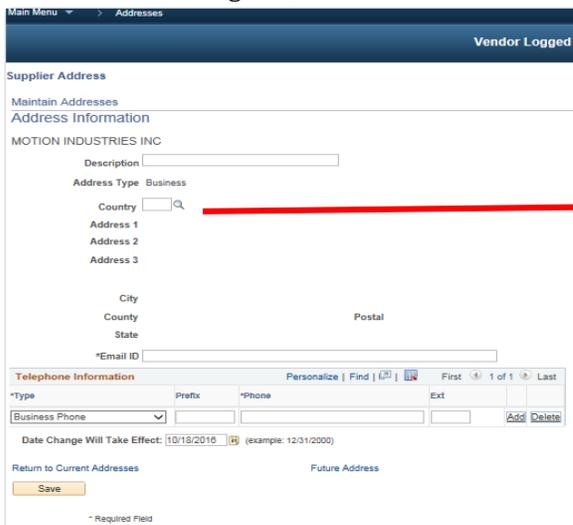
Allows the ability to add new addresses, but not to edit an existing address. NOTE: To edit or to remove an existing address, email vendor@lcra.org with request.

To add a new address or additional address(es):

- a) Click **Addresses** link from the navigation to the left
- b) Click **Add a New Address**



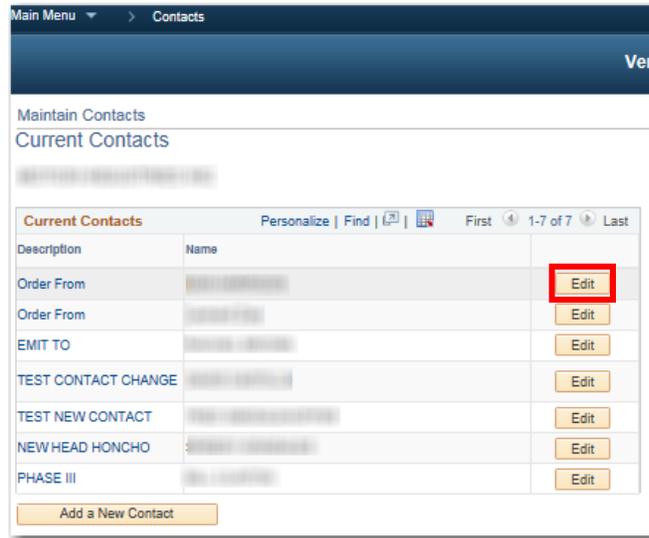
- c) Input the **description**
- d) Input the **Country code** – type **U** to find USA or look up by clicking the magnifying glass; select **USA** and hit **Tab**



- e) The Address fields open that require the following: **Address line 1, City, County, State and Postal**. It is not mandatory to enter the **Email ID** or the **phone number**.
- f) Input the specific date to take affect
- g) Click **Save**

5. **Contacts: To update contact information for suppliers**

- a) Click **Contacts** link from the navigation
- b) Click **Edit** next to the item to be changed



- c) Make necessary changes; click Save

6. **Contacts: To add a new contact for suppliers**

Requirements: email and phone number

- a) Click **Contacts** link from the navigation
- b) Click **Add a New Contact** button
- c) Input the **description** and **name**; select drop down next to **Location, Role and Status** to select the appropriate options.

- d) To input the phone number, select the drop down under **Type** to select the appropriate information; **in the Phone field, enter the area code and number.** Enter an **Extension** if applicable. Click **Add to input additional phone numbers if needed.**
- e) Click **Save**

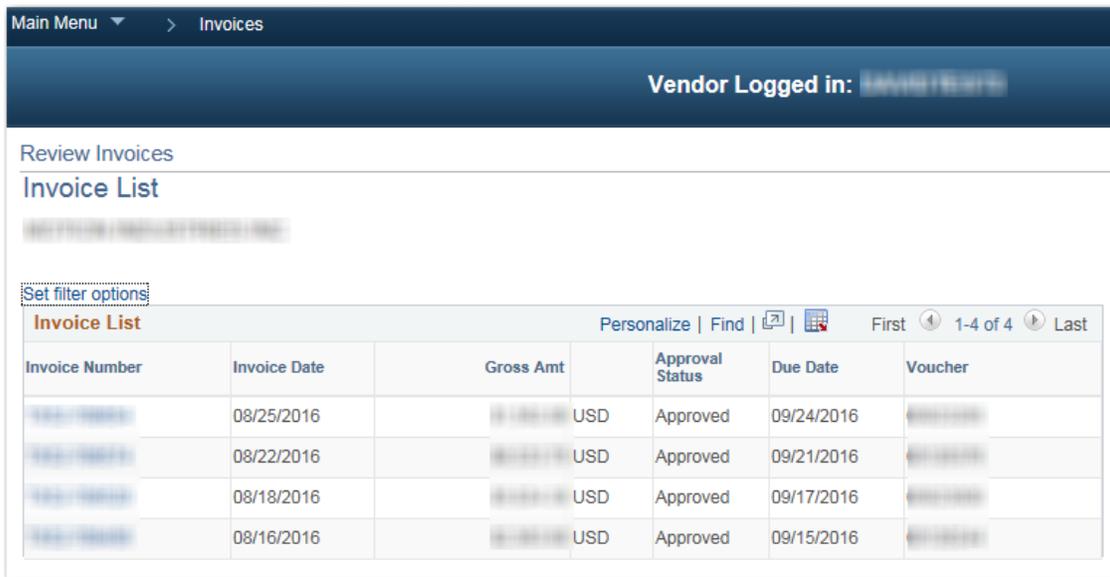
D. Searching Information

Searches can be performed on invoices, payments, account balances, purchase orders, view order summary, view receipts and respond to quote.

1. Invoices

- a) Click on the **Invoices link** from the navigation
- b) Enter your search criteria (invoice number, date range, Item number, etc.)
- c) Click **Search**

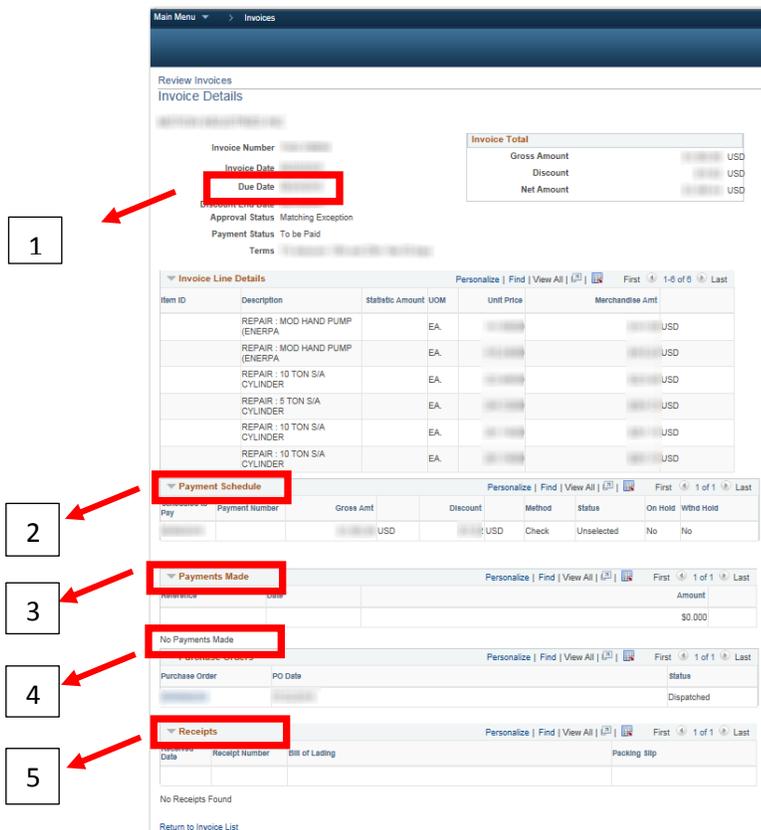
d) A new page will appear with the results from your search criteria.



e) Click on the **Invoice Number** that you wish to view.

f) Invoice details will appear.

g) You can find the payment **1) Due Date** in the header section, and associated information at the bottom of the screen for **2) payment schedule, 3) payments made, 4) purchase orders, and 5) receipts.**



2. Payments

- a) Click on the **Payments** link from the navigation
- b) Enter your search criteria (Invoice number, date range, etc.)
- c) Click **Search**

Main Menu > Payments

Review Payments

Filter Options

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

Invoice Number

Payment Reference

From Payment Date (example: 12/31/2000)

To Payment Date (example: 12/31/2000)

- d) A new page will appear with the results from your search criteria.

Main Menu > Payments

Review Payments

Payments Made

Set filter options

Payments Made Personalize | Find | First 1-8 of 8 Last

Reference	Invoice Number	Payment Date	Amount
		2016	USD

4. Purchase Orders

- a) Click on the **Purchase Orders** link on the navigation to the left.
- b) Enter your search criteria (PO number, date range, Item number, etc.)
- c) Click **Search**
- d) A new page will appear with the results from your search criteria.
- e) Click on the **PO number** in the Purchase Order column that you wish to view.
- f) Purchase Order List will appear.
- g) To see details about a particular PO, click on the **Purchase Order** number.

The screenshot shows the 'Purchase Order List' interface. At the top, there is a navigation bar with 'Main Menu' and 'Purchase Orders'. Below this, a dark blue banner indicates 'Vendor Logged in: [redacted]'. The main content area has a header 'Purchase Orders' and a sub-header 'Purchase Order List'. There are search filters for 'POs Returned' and 'Default View for Change Orders' (set to 'All lines'). A 'Set filter options' link is present. The table below has columns: 'Purchase Order', 'Status', 'Last Dispatched Date/Time', 'Lines', 'Total Amount', and 'Acknowledge Status'. The first row is selected with a checkbox. Below the table, there are 'Select All' and 'Clear All' options, and a button 'View Selected POs in Downloadable Format'. A note explains the 'View PDF' button.

Purchase Order	Status	Last Dispatched Date/Time	Lines	Total Amount	Acknowledge Status	
<input checked="" type="checkbox"/> 0000000000	Change Order -1	08/16/2016 6:57:58AM	6	USD	New	View PDF
<input type="checkbox"/> 0000000000	Compl	08/15/2016 8:13:09AM	2	USD		View PDF
<input type="checkbox"/> 0000000000	Compl	08/09/2016 8:19:22AM	2	USD		View PDF
<input type="checkbox"/> 0000000000	Compl	08/02/2016 1:16:56PM	2	USD		View PDF
<input type="checkbox"/> 0000000000	Dispatched	08/02/2016 1:00:42PM	18	USD	New	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.)

- a) Purchase Order Details page appears.
- b) **Purchase Order date (1)** and **header comments (2)**
- c) **Extension, Line Details** and **Contact Info (3)** can be found in tabs.
- d) **Purchase Order Line Information** can be viewed by clicking the line number. (4)
- e) **Comments** can be viewed by clicking on the comments icon. (5)
- f) **Invoices** against this PO will show in the **Invoice List** at the bottom. (6)

The screenshot shows a web application interface for 'Purchase Orders'. At the top, there is a navigation bar with 'Main Menu' and 'Purchase Orders', and a 'Vendor Logg' button on the right. The main content area is titled 'Purchase Order Details' and contains several sections:

- Header Information:** Includes fields for PO Number, PO Status (Dispatched), Buyer, Billing Location (01), and Payment Terms. A red box labeled '1' highlights the 'Purchase Order Date' field.
- Purchase Order Total:** A summary table showing Merchandise Amount, Freight/Tax/Misc. (0.00), and Total Amount.
- &Header Comments:** A section with a 'View' button, highlighted by a red box labeled '2'.
- Purchase Order Lines:** A section with tabs for 'Line Information', 'Extension', 'Line Details', and 'Contract Info'. The 'Line Information' tab is active. Below the tabs is a table with columns: Line, Status, Item ID, Description, Quantity, Merchandise Amt, and Comments. The first row (Line 1) is highlighted by a red box labeled '4'. A red box labeled '3' highlights the tabs. A red box labeled '5' highlights a comment icon in the 'Comments' column of the first row.
- Invoice List:** A table at the bottom with columns: Invoice, Invoice Date, Amount, Due Date, Appr Stat, and Voucher. It shows one row with an amount of 0.000. A red box labeled '6' highlights this section.

5. View Order Summary

- a) Click on the **View Order Summary** link on the navigation to the left.
- b) Enter your search criteria (date range, Item ID, Supplier Item ID, etc.)
- c) Select the check box **Include PO Data**.
- d) Click **Search**.

Main Menu > View Order Summary

Vendor Logged in

View Order Summary

Filter Options

MOTION INDUSTRIES INC

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

Include PO Data PO Status

From Date (example: 01/31/2000)

To Date (example: 01/31/2000)

Item ID

Supplier Item ID

- a) A new page will appear with the results from your search criteria.

Main Menu > View Order Summary

Vendor Logged in: [Name]

View Order Summary

Order Schedule

MOTION INDUSTRIES INC

[Set filter options](#)

Schedules Personalize | Find | First 1-3 of 3 Last

Due Date	Item ID	Description	Quantity	Business Unit	PO Number	Type	Status	Ship To
09/20/2016	00000000	...	0000 EA	LCRA	...	PO	Dispatched	...
09/20/2016	00000000	...	0000 EA	LCRA	...	PO	Dispatched	...
09/20/2016	00000000	...	0000 EA	LCRA	...	PO	Dispatched	...

6. View Receipts

- a) Click on the **View Receipts** link on the navigation to the left.
- b) Enter your search criteria (receipt date range, PO ID, Shipment number, Item ID, Supplier Item ID, Receipt status).
- c) Click **Search**.

The screenshot shows a web application interface for 'View Receipts'. At the top, there is a navigation bar with 'Main Menu' and a right-pointing arrow, followed by 'View Receipts'. Below this is a header area with 'Review Receipts' and 'Filter Options'. A blurred line of text is present below the header. A instruction reads: 'Enter search criteria and click on Search. Leave blank for all values.' Below this is a section titled 'Search Criteria' with several input fields: 'From Receipt Date' (10/06/2010) with a calendar icon and '(example: 12/31/2000)'; 'To Receipt Date' (10/20/2016) with a calendar icon and '(example: 12/31/2000)'; 'From PO ID' with a magnifying glass icon; 'To PO ID' with a magnifying glass icon; 'Shipment Number' with a magnifying glass icon; 'Item ID' with a magnifying glass icon; 'Supplier Item ID' with a magnifying glass icon; and 'Receipt Status' with a dropdown arrow. A 'Search' button is located at the bottom left of the form area.

d) A new page will appear with the results from your search criteria.

Main Menu > View Receipts

Vendor Logged in: [User Name]

Review Receipts

Receipt Lines

Set filter options

Receipt Lines Personalize | Find | View 100 | First 1-100 of 2098 Last

Receipt Number	Received Date	PO Number	Ship No	Item ID	Description	Received UOM	Status
10000001	10/10/2018	1000000001	1000000001	1000000001	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000002	10/10/2018	1000000002	1000000002	1000000002	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000003	10/10/2018	1000000003	1000000003	1000000003	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000004	10/10/2018	1000000004	1000000004	1000000004	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000005	10/10/2018	1000000005	1000000005	1000000005	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000006	10/10/2018	1000000006	1000000006	1000000006	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000007	10/10/2018	1000000007	1000000007	1000000007	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000008	10/10/2018	1000000008	1000000008	1000000008	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000009	10/10/2018	1000000009	1000000009	1000000009	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000010	10/10/2018	1000000010	1000000010	1000000010	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000011	10/10/2018	1000000011	1000000011	1000000011	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000012	10/10/2018	1000000012	1000000012	1000000012	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000013	10/10/2018	1000000013	1000000013	1000000013	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000014	10/10/2018	1000000014	1000000014	1000000014	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000015	10/10/2018	1000000015	1000000015	1000000015	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000016	10/10/2018	1000000016	1000000016	1000000016	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000017	10/10/2018	1000000017	1000000017	1000000017	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000018	10/10/2018	1000000018	1000000018	1000000018	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000019	10/10/2018	1000000019	1000000019	1000000019	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000020	10/10/2018	1000000020	1000000020	1000000020	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000021	10/10/2018	1000000021	1000000021	1000000021	DESCRIPTION OF THE RECEIPT	10000 EA	Closed
10000022	10/10/2018	1000000022	1000000022	1000000022	DESCRIPTION OF THE RECEIPT	10000 EA	Closed

e) Click on the Receipt Number to see details.

Main Menu > View Receipts

Vendor Logged in: [User Name]

Review Receipts

Receipt Details

Receipt Number: 10000001 Packing Slip Number: 10000001

Receipt Datetime: 10/10/2018 Pro Number:

Receipt Status: 10000001

Item ID: 10000001

Supplier Item ID:

Quantity Received: 10000 EA

Quantity Inspected: 10000 EA

Quantity Accepted: 10000 EA

Quantity Returned: 10000 EA

Quantity Rejected: 10000 EA

Net Receipt Quantity: 10000 EA

Reason for Rejection:

RMA Number: RMA Line:

Purchase Order Schedule Personalize | Find | 1 of 1 Last

PO Number	Due Date	Quantity	Ship To	Ship Via	Freight Trm	Price	Merchandise Amt
10000001	10/10/2018	10000 EA	10000001	10000001	See Comments Below	10000000	10000000 USD

Invoice Lines Personalize | Find | 1 of 1 Last

Invoice	Description	Statistic Amount	Unit Price	Merchandise Amt

No Invoices Found

Return to Receipt List

7. Respond to quote

LCRA does not issue requests for quotes through this system, but current opportunities may be found on our website.

- a) Go to www.lcra.org
- b) Click on the **About** tab at the top
- c) In the navigation to the left, click **Business Opportunities with LCRA**.
- d) Click **Business Opportunity Postings** to see business opportunities with LCRA.

8. Change Password

Requirements: The password must:

- Be at least 8 characters in length.
- Contain at least 3 of the 4 following character types:
 - a) Lowercase letters (abc)
 - b) Uppercase letters (ABC)
 - c) Numbers (123)
 - d) Special characters (#?!)

To change your password:

- a) Enter the **Old Password**
- b) Enter the **New Password**
- c) Confirm the **New Password**
- d) Click **Change Password**

Your password is now changed.



The screenshot shows a web form titled "Change Password". It contains the following fields and elements:

- User ID:** A text field with a greyed-out value.
- Description:** A text field with a greyed-out value.
- Old Password:** A text input field.
- New Password:** A text input field.
- Confirm Password:** A text input field.
- Change Password:** A yellow button at the bottom of the form.

9. Sign out of eSupplier

- a) Click on the **Sign Out of eSupplier** link on the navigation to the left to sign out of eSupplier.