Corporate Vendor Administrator- Roles and Responsibilities

Roles and Responsibility

AMS WBSCM Support Team
The role of Corporate Vendor Administrator (CVA) is critical for the success of a vendor to participate in USDA purchase programs. These instructions will outline the responsibilities and procedures for the various functions that the CVA needs to perform in the Web Based Supply Chain Management System (WBSCM). The instructions are broken down into four areas.

1. **Adding Users/New User Registration Process**  
   a. Resending New User e-mail
2. **Adding Plants/Shipping Points**
3. **Assigning users to Plants/Shipping Points**
4. **Reports**  
   a. Business Partner Relationship Report  
   b. Other Reports  
      i. Good Receipts  
      ii. Advance Ship Notification  
      iii. List of Invoices  
      iv. List of Purchase Orders  
      v. Print Multiple Purchase Orders

**New Vendor - Process**

USDA adds Vendor to WBSCM

Vendor Supplies Names to USDA for employees who will serve as CVA and submit offers on behalf of the Vendor

USDA enters users into WBSCM and assigns them the appropriate role(s)
# Corporate Vendor Administrator-Roles and Responsibilities

Corporate Vendor Responsibility:

<table>
<thead>
<tr>
<th>CVA User Completes Registration Process</th>
<th>Adds Additional Users in WBSCM</th>
<th>Review Plant and Shipping Point Information in WBSCM</th>
</tr>
</thead>
<tbody>
<tr>
<td>User follows instructions in WBSCM e-mail Obtains E-auth - Level 1 access</td>
<td>Enters other users that will need access to the information or perform duties in WBSCM and assign the appropriate roles</td>
<td>Run the Business Partner Relationship Report in WBSCM and reviews the information</td>
</tr>
<tr>
<td>Completes registration process in e-mail to gain entry WBSCM</td>
<td>Assist users in getting access to WBSCM following the same e-mail process</td>
<td>Submits request for additional plants or shipping points that are needed in WBSCM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assign users to the applicable plants and shipping points</th>
<th>Provide training to users for the various functions in WBSCM</th>
<th>Requires knowledge of the various report available in WBSCM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once user is in WBSCM they need to be assigned to the plants and shipping points that they need access to</td>
<td>CVA should be the first person that their users go to for assistance with the various functions in WBSCM</td>
<td>CVA should be able to run all reports available to the vendor and customize the requested data</td>
</tr>
<tr>
<td>Follow instructions on adding users to plants and shipping points</td>
<td>If unable to assist the users contact the WBSCMAMSHelpDesk for assistance</td>
<td></td>
</tr>
</tbody>
</table>

CVA should be the first person that their users go to for assistance with the various functions in WBSCM.
Adding Users and New User Registration Procedures:

Once the CVA has completed their registration process and can successfully log into WBSCM, then they must set-up other users who will need to have access to WBSCM. Due to security reasons, no users should be sharing the same login ID to access WBSCM. The CVA should assign the appropriate roles to the user that allows them to perform the functions in WBSCM that is required of them. The table below shows the various roles available for assignment and if they are applicable to AMS procurement.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
<th>Applicable to AMS procurement</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASN Dispatcher-CVN</td>
<td>Allows user to create the required Advance Ship Notices</td>
<td>Yes</td>
</tr>
<tr>
<td>Commodity &amp; Service All Activities-CVN</td>
<td>Allows users to perform activities associated with commodity purchases except for the Administrative activities like creating users or adding plants/shipping points.</td>
<td>Yes</td>
</tr>
<tr>
<td>Commodity Offer-Vendor-CVN</td>
<td>Allows users to submit offers on behalf of the vendor</td>
<td>Yes</td>
</tr>
<tr>
<td>Corporate Vendor Admin-CVN</td>
<td>Allows users to perform all activities in WBSCM</td>
<td>Yes</td>
</tr>
<tr>
<td>Freight-All Activities-CVN</td>
<td>Allow user to perform all freight activities in WBSCM</td>
<td>No</td>
</tr>
<tr>
<td>Freight Offer-Vendor-CVN</td>
<td>Allows the user to submit offers for any freight request</td>
<td>No</td>
</tr>
<tr>
<td>Inspection Results-Vendor-CVN</td>
<td>Allows the user to enter inspection results in WBSCM for a material</td>
<td>No</td>
</tr>
<tr>
<td>Invoice Processor-Vendor-CVN</td>
<td>Allows for the user to create and submit invoices on behalf of the vendor</td>
<td>Yes</td>
</tr>
</tbody>
</table>
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Proceed to: **Portal→Admin→Manage Users**

![Image of Manage Users interface with Create New User highlighted]

Click on “Create New User”
Enter all user information with the exception that “Title” can remain blank.

Click on the “Role Data” tab

Select the role that needs to be added – see chart on page 4 for the definition of roles
Click the “Add” button

Once applicable role(s) have been added, click “Save”

Note: Should the job function of a user change at any time the same process would be followed to add or remove roles.

The user should receive an automatic e-mail with further instruction to set up a level one e-authentication account and proceed to log into WBSCM.
Resending new user e-mail:

In the event that a user did not receive the new user e-mail, the CVA can resend the new user e-mail. Under manage user, highlight the user that the new user e-mail needs to be sent and click on the Admin Data tab. In addition if a user has left the company or no longer needs access to WBSCM, the user can be locked out of the system.

Click on “Resend New User Email” The user will be sent the new user e-mail. **Note:** Verify that the e-mail address under the Personal Data tab is correct before resending the new user e-mail.
Adding Plants and/or Shipping Points

One will need to review the Business Partner Report to determine if a new plant and shipping point needs to be added to WBSCM.

Note: New vendors will need to complete this step prior to submitting offers. Also if you plan to use this plant or shipping point when bidding, this needs to be completed prior to submitting the offer under a solicitation.

Proceed to: **Portal→Suppliers→Maintain Organization**
Click on Plant/Shipping Registration
Registration for a Plant

Make sure that the radio button at top of page is selected for Plant.

Enter all required information following the requirements below:

- **Name 1** – ENTER THE NAME OF THE PLANT – ALL CAPs
- **E-Mail Address**: Provide e-mail address for contact person at the plant
- **Telephone**: Phone number for contact person
- **Street Address**: Enter street address
- **Zipcode**: Enter zipcode for the location
- **Location**: Enter the location city
- **State/Region**: Enter the two letter abbreviation of the State
- **Country**: USA

Select the category that best matches the products the plant is approved to produce by clicking on the box before the category.
Scroll down and review the USDA Data Privacy Statement and check the ☑ Yes, I have… and then click on the “Submit” button.

A message will be displayed showing the successful submission of the plant or shipping point for approval.
Immediately after the plant has been submitted in WBSCM send an e-mail message to the 
WBSCMAMSHelpDesk@ams.usda.gov. The message should provide the name of the plant 
and/or shipping point, street address, city, state, and zipcode. This will alert AMS that a plant 
and/or shipping point has been entered in WBSCM.

Note: If an e-mail is not sent to the WBSCMAMS help desk, then the plant and/or shipping point will not be approved. WBSCM does not provide any notification to AMS for the registration requests.

If the plant or shipping point is the same location, one must submit the location as a plant 
and as a shipping point.

Submitting a Shipping Location:

Proceed to: Portal→Suppliers→Maintain Organization
Click on Plant/Shipping Registration

Registration for a Shipping Location
Make sure that the radio button at top of page is selected for Plant.
Enter all required information following the requirements below:

**Name 1** – ENTER THE NAME OF THE SHIPPING LOCATION –ALL CAPs
**E-Mail Address**: Provide e-mail address for contact person at the shipping location
**Telephone**: Phone number for contact person
**Street Address**: Enter street address
**Zipcode**: Enter zipcode for the location
**Location**: Enter the location city  
**State/Region**: Enter the two letter abbreviation of the State  
**Country**: USA

Select the category that best matches the products the plant is approved to produce by clicking on the box before the category.

To continue the registration process of a shipping location, follow the instructions for entering a plant located on page 11 and 12 above.
Assigning Users to Plants and/or Shipping Points
Once notification from the WBSCMAMSHelpDesk that submitted plant and or shipping point has been approved, one will need to assign those users in WBSCM that will need access to the data for any of the following actions: 1) submission of offers, 2) review awarded purchase orders, 3) creation of the Advance Ship Notices (ASN), 4) submission of invoices, and 5) executing reports for the plant.

Proceed to: Portal→Suppliers→Maintain Organization
Click on Plant/Shipping Points – User assignments

Select the appropriate action, “Assign User to a Plant” or “Assign User to a Shipping Point”.

Note: An AMS vendor will not use “Assign User to a Freight Agency”.
Click “Go”

Select the user (WBSCM ID) and the plant that the user needs to be assigned (will be highlighted in blue). To find the user’s WBSCM ID, please see adding users to WBSCM. To check for users already assigned to the plant click on “Display Existing Rel”.

Users assign to the highlighted plant are displayed in the Existing Relationship box below.
If user is not listed, select “Assign User to Plants” Continue same process to assign the user to other plants.
Message: “Record created successfully” is displayed.

To verify, click on display existing Rel and name should appear in the Existing Relationships box below.

User is added to the highlighted plant.
If one needs to add users to Shipping points after adding them to the plants, click on the “Back to Main button” Select “Assign User to Shipping Point”, process will follow the same as adding user to a Plant.
**Reports** Business Intelligence (BI) these reports are updated nightly and contain historical data; On Line Transaction Process Reports (OLTP)-these reports are real time with the data updated immediately:

**Business Partner Relationship Report-OLTP**

To check to see what plant(s) or shipping point(s) is set-up in WBSCM, the CVA should review the Vendor Business Partner Relationship before submitting any new plant or shipping point in WBSCM.

Proceed to: **Portal → Admin**

Select the Vendor Business Partner Relationship report

The plants and shipping points that are approved in WBSCM will be displayed. The business partner number of plants will always start with 11XXXX and shipping points will start with 12XXXX. If the plant or shipping point is not listed, a new request should be entered in the system. ([See instruction above for entering a plant and/or shipping point](#)).
The report can be exported and saved to another location. There are two options: One can, click on the more icon and select "local file".

or click on the “local file” button
Select Spreadsheet and click on green checkmark at bottom

Click on the little white box to navigate to the file location for the report. Browse to location (folder) where the file is to be saved and enter the name for the file.
Below is a sample file name and folder location - once complete click "Save"

Click on “Generate”. The report is generated. To view the report, go to the location of the report and open the report.
**Goods Receipt-OLTP** – Excellent report that provides information on PO line item detail for ASN, Good Receipt, and Invoicing when the correct information is selected. The report can be exported to Excel.

Proceed to: **Portal→Suppliers→Supplier Self Service→Supplier Self Service**

Click on **All Goods Receipts**
Enter the PO number or any other report categories that should be included in the report. When selecting the “include invoice data” only one PO can be entered for information to be included.

Click on the Execute button to create the report

Click on the “Export” button if one ones to save or open in excel.
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Click on the “Open” or “Save” button to send it to Excel.

Open button will open the file in excel. Save button will save it to the folder that one enters.
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Opening the file, click “Yes”

File will open in Excel – will need to use the “save-as” button to save in Excel file format.

SAMPLE REPORT
SAMPLE REPORT
Advance Shipping Notification (ASN) Report – BI
Proceed to: Portal→Reports

Click on Advance Shipping Notification Report

If one does not know the Purchase Order number, one can select the double white boxes to bring up a search window. Highlight the PO that one wants to search in the left hand column and click on “Add” button. PO number will be displayed in the right hand column. Once done adding POs click on the “OK” button.
Once all search criteria is entered, click “OK”

Report is displayed, to add additional report criteria, select the category from “Free characteristic” and drag it to where you want the data to be added under the “Rows” information. (Similar to Drag/Drop feature in windows) Black line with two arrows will display to where the data will be inserted.
Successfully added “ASN Status” characteristic

Click “Export to Excel” to export the report to Excel
One can either “Open” or “Save” file

To “Open”, click on “Yes”
File is opened in Excel, use Save-As feature to save it in Excel format
**List of Invoices - BI**

Proceed to: **Portal→Reports**

Click on **List of Invoices**

Enter search criteria information – Click “OK”
Report is displayed, one can customize the report before exporting the file to excel.

Select Column that needs to be moved, click and drag to where column needs to be moved to and release. – Reference PO Number moved to first column (Click-Drag-Drop)
PO Item number moved to right of Reference PO Number (Click-Drag-Drop)

Report ready for exporting to Excel
List of Purchase Orders – BI
Proceed to: Portal ➔ Reports

Click on List of Purchase Orders

Enter applicable search criteria, Click “OK”

Report is executed
Select Column that needs to be moved, click and drag to where column needs to be moved to and release. – Reference PO Number moved to first column (Click-Drag-Drop)

To remove a column, select the column and drag below “Free characteristics” or to empty area below report. (Click-Drag-Drop)
To add a “Free characteristics” select and drag to “Rows” area until a line shows up between the row one wants the data to be displayed

Vendor was added to the first column and Vendor Plant was added after PO Item No.
Report is ready to export to Excel.
Open or Save report

Saving a report Sample – Save – provide file name and file location to save the report and click “Save”
Print Multiple Purchase Orders – BI
Proceed to: Portal → Reports

Click on Print Multiple Purchase Orders
Enter PO number or other search criteria – click “Get Purchase Orders”

Select the Purchase Orders one would like to print and click on the blue box to the left of the row (row will be highlighted in yellow)
Click on “Print Purchase Orders”

Purchase orders will be displayed, one can either save or print the POs.
Click on File Icon to save the file to local file location.

Provide location and file name. Click “Save”