Corporate Vendor Administrator - Roles and Responsibilities

AMS WBSCM Support Team
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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 (WBSCM) System. The instructions are broken down into four areas.

1. Adding Users/New User Registration Process
2. Adding Plants/Shipping Points
3. Assigning users to Plants/Shipping Points
4. Reports

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 Responsibility

**CVA User Completes Registration Process**
- User follows instructions in WBSCM e-mail
- Obtains E-auth - Level 1 access
- Completes registration process in e-mail to gain entry WBSCM

**Adds Additional Users in WBSCM**
- Enters other users that will need access to the information or perform duties in WBSCM and assign the appropriate roles
- Assist users in getting access to WBSCM following the same e-mail process

**Review Plant and Shipping Point Information in WBSCM**
- Run the Business Partner Relationship Report in WBSCM and reviews the information
- Submits request for additional plants or shipping points that are needed in WBSCM

**Assign users to the applicable plants and shipping points**
- Once user is in WBSCM they need to be assigned to the plants and shipping points that they need access to
- Follow instructions on adding users to plants and shipping points

**Provide training to users for the various functions in WBSCM**
- CVA should be the first person that their users go to for assistance with the various functions in WBSCM
- If unable to assist the users contact the WBSCMAMSHelpDesk for assistance

**Requires knowledge of the various report available in WBSCM**
- CVA should be able to run all reports available to the vendor and customize the requested data
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 Administrative activities such as 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>Maybe - Review contract terms and conditions to determine if inspection lots are required</td>
</tr>
<tr>
<td>Invoice Processor-Vendor-CVN</td>
<td>Allows the user to create and submit invoices on behalf of the vendor</td>
<td>Yes</td>
</tr>
<tr>
<td>Vendor Disbursement-CVN</td>
<td>Allows the user to run the payment details report. This report provides information on the disbursement of payments to vendors by USDA</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Navigate to: Admin>Manage Users>Manage Users

Click on "Create New User" and enter all user information on the Personal data tab below
Click on the “Role Data” tab
Select the role that needs to be added from the Available Roles list and click the Add button to move the desired role to the Current Roles list – see chart on page 4 for the definition of roles

When finished adding roles, click the Save button.
You should see a "User Created Successfully" message below and the newly added user should appear alphabetically in the list above.

The user should receive a unique, auto-generated email message with further instructions to set up a Level 1 eAuthentication account and proceed to log into WBSCM.

Below is a partial example of the email message:

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WBSCM_USER_REGISTRATION@AMS.USDA.GOV <WBSCM_USER_REGISTRATION@...

This is an automatically generated message. Please do not reply back to this email

This email is for the individual identified in the greeting line and cannot be shared with any other user.

Dear Bob Baker,

A user account has been created for you in the United States Department of Agriculture (USDA) Web-Based Supply Chain Management (WBSCM) System.

In order to access this account, you will need to have a user ID and password in the USDA eAuthentication System. At that point you will be able to complete your registration with the WBSCM system. The three step process listed below will help you complete your registration with WBSCM.

Important Notes:

- The email address appearing in the To: line of this message, and the last name of the recipient in the greeting line must match the email address and the last name entered in the eAuthentication registration forms. Failure to follow this procedure will result in an error message during the WBSCM registration process.
- Hyphens, Spaces and Apostrophes must be removed from the last name when creating the eAuthentication account. After you have completed your WBSCM registration, you will be able to change your last name using the WBSCM "Maintain User Profile" function under the "Admin" menu option.

How to Complete Registration with WBSCM
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Resending new user e-mail:

In the event that a user did not receive the new user email, the CVA can resend the new user email. Under Manage Users, highlight the appropriate user and click on the Admin Data tab. Then click "Resend New User Email" to generate a new email notification. Note: Verify that the email address under the Personal Data tab is correct before resending the new user email.
To modify user roles:

Under Manage Users, highlight the applicable user, then click on the Role data tab and press the Modify User button.

If a role needs to be removed, select the role that needs to be removed from the Current Roles list and click the Remove button.
If a role needs to be added, select the role that needs to be added from the Available Roles list and click the Add button to move the desired role to the Current Roles list.

When finished adjusting the roles for the applicable user, press the Save button.
You should see a "User Updated Successfully" message below.

Locking a user from accessing WBSCM:

If a user has left the company or no longer needs access to WBSCM, the CVA can lock the user from accessing the system.
Under Manage Users, highlight the appropriate user and click on the Admin Data tab, then Modify User.

Once in edit mode, check the User Locked box and enter text into the Reason Locked field. Click Save when finished.
After clicking save, you should receive a "User Updated Successfully" message below.

Note: If a locked user needs to be unlocked to resume access to WBSCM, highlight the applicable user name, click on the Admin data tab, select Modify User, then remove the checkmark from the User Locked field, then press Save.
Adding Plants and/or Shipping Points

Please refer to the Vendor Business Partner Relationship Report for a listing of all plants/shipping points currently defined in WBSCM for your company. This report is located at: Admin>Manage Users>Vendor Business Partner Relationship Report

New vendors will need to add plants and shipping points, if applicable, prior to submitting offers.

Navigate to: Suppliers>Maintain Organization
Click on Plant/Shipping Registration

Please note that the process is the same for creating a plant or shipping location.
- If creating a plant, select the radio button next to Plant.
- If creating a shipping location, select the radio button next to Shipping Location.

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

Scroll through the Product Categories section and select the ones that best match the products the plant is approved to produce.
When finished entering all of the data on this form, check that you have read the data privacy statement and press Submit.

After you submit your plant or shipping point, you should receive a confirmation message on the screen. Please note that the 7-digit business partner number will begin with "11" for a Plant, and "12" for a Shipping Location.
Immediately after the plant or shipping point has been submitted in WBSCM, send an e-mail message to the AMS helpdesk at WBSCMAMSHelpDesk@ams.usda.gov. In your email, please identify whether you created a plant or a shipping point, and include the name of the plant and/or shipping point, street address, city, state, and zip code. Sending an email will alert AMS that a plant and/or shipping point has been entered in WBSCM and is awaiting USDA approval, as WBSCM does not currently have functionality to notify USDA of pending registration requests.

**Assigning Users to Plants and/or Shipping Points**

Once you have received notification that your plant and/or shipping point has been approved, you may proceed with assigning users to the plant and/or shipping point.

Users within your company that do not have the Corporate Vendor Admin role, will need to be assigned to each individual plant and/or shipping point for which the user will be performing various activities in WBSCM, such as: submitting offers, reviewing POs, creating ASNs, submitting invoices, and executing reports.

Navigate to: **Suppliers>Maintain Organization**

Click on Plant/Shipping Points – User assignments

Please note that the process is the same for assigning a user to a plant or shipping location.

- If assigning to a plant, select the radio button next to Assign User to a Plant.
- If assigning to a shipping point, select the radio button next to Assign User to a Shipping Point.

**NOTE:** AMS vendors will not assign users to a freight agency.
Select the appropriate radio button and then press Go.

To see which users are already assigned to a specific plant:
Highlight the plant, then press the Display Existing Rel button. All users currently assigned to the plant will be shown in the Existing Relationships box below.
To add a new user to this plant, select the user (WBSCM ID) from the user dropdown and press the Assign Users to Plants button. If you are uncertain of the user’s WBSCM ID, navigate to Admin>Manage Users, highlight the applicable user and review the User ID field on the Personal data tab.

You should get a "Record created successfully" message at the top of the screen.
To verify that the user was added, highlight the applicable plant, and press the Display Existing Rel button. See below that this vendor was added to the specified plant.

Follow the same process to assign the user to additional plants. If you need to add users to a shipping point, press the Back to Main button and select the Assign User to a Shipping Point radio button and repeat the same process as assigning a user to a plant.

Once a user is assigned to a plant, there isn't a way to delete them from that plant, but you can deactivate their plant access with a validity period. NOTE: once you deactivate a user's plant access, if you later decide that user's plant access needs to be reactivated, you will need to contact the helpdesk for assistance at WBSCMAMSHelpDesk@ams.usda.gov.

To deactivate a user's plant access, highlight the applicable plant, and press the Display Existing Rel button.
Highlight the applicable user in the Existing Relationships box and manually change the Valid To Date field entry to the date that user access to that plant should end, then press the Delimit Date button.

You should receive a Record changed successfully message at the top of the screen.
Reports

For a list of available reports in WBSCM, along with step-by-step instructions, click on the Help tab, click Job Aids, and select Reports.