Welcome to NC4 Training

Module: Vendor Report

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1 Module: Vendor Report

The Vendor Report is used to manage the vendors providing goods or services to the jurisdiction. The report indicates the operational status of the vendor and tracks damage to the vendor's capabilities. A vendor can be selected in a Resource Request or/and Critical Asset only if associated with the specific resource type. Contract info, pricing lists and other financial/contractual information can be attached to the Vendor Report for easy reference.

Note: All person names and corresponding titles used in this document are fictitious. The names and titles are being used for the sole purpose of illustrating the systems' features and functionalities in an instructional environment.

Learning Objectives

After completing this module, you will be able to:

- Create and update a Vendor Report.
- Explain key report elements.
- Use common functions.

ICON KEY
Valuable information
Test your knowledge
Keyboard exercise
Review

2 General Overview of Vendor Reports

This section of the module provides an overview of the Vendor Report form. You will become familiar with the layout of the form and understand the type of information that it can contain.

2.1 Viewing Vendor Reports

Existing Vendor Reports are presented to you sorted by name when you select **Vendor** from the **Report** navigation drop down menu, as shown in Figure 1.

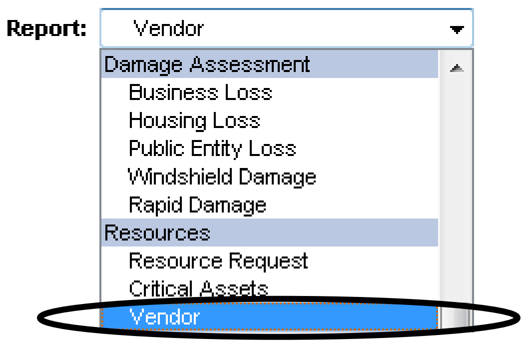


Figure 1 Selecting an Existing Vendor Report

The Vendor report in the summary screen shows all reports by name alphabetically as shown in Figure 2.

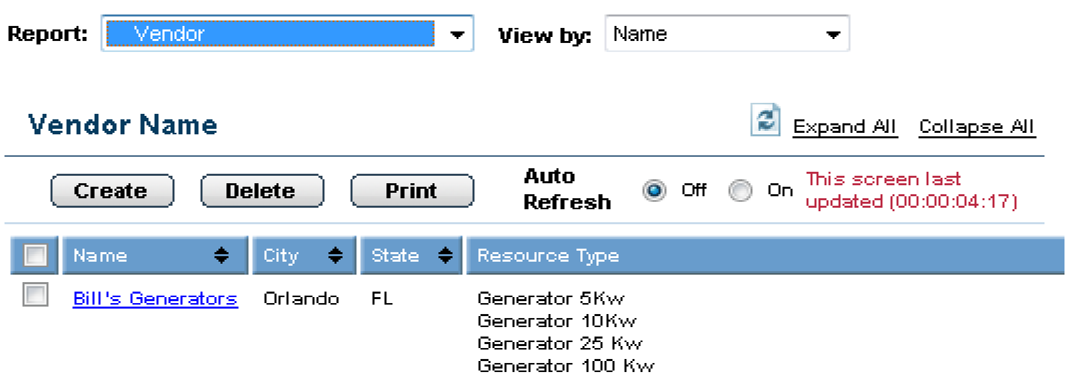


Figure 2 Vendor Report Summary Screen

2.1.1 Sorting Vendor Reports

The Vendor Report summary screen can be sorted by selecting sort order in the **View by** drop down menu as shown in Figure 3. In addition, the reports can be sorted in ascending or descending order within the column headings in the summary screen by using the ⬍ arrows.

Click the arrows (⬍) in column headings to sort the list in ascending or descending order.

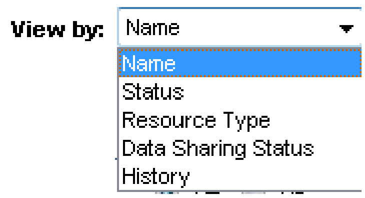


Figure 3 Vendor Reports View by Drop Down Menu

The headings in the summary screen are governed by the selection made in the **View by** drop down menu.

2.1.2 Selecting a Vendor Report

You will be presented with the **Vendor** reports by **Name** in the summary screen as shown in Figure 4.

To *View* the details associated with a given vendor, click the Name link in the Name column.

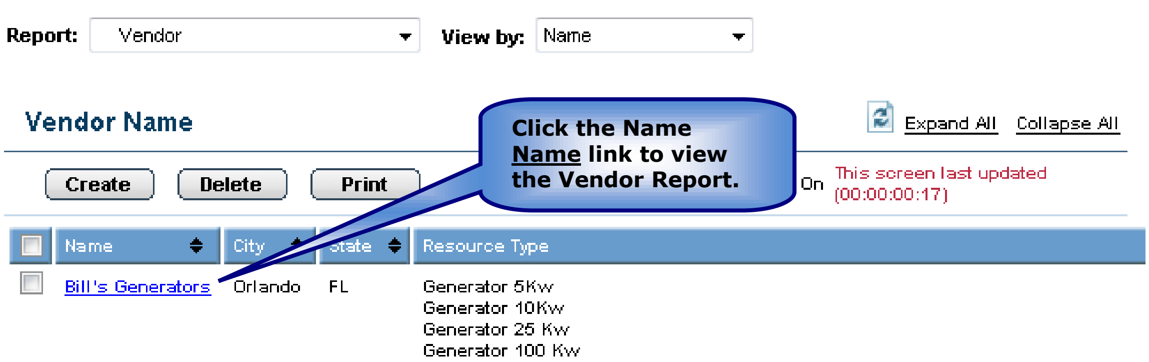
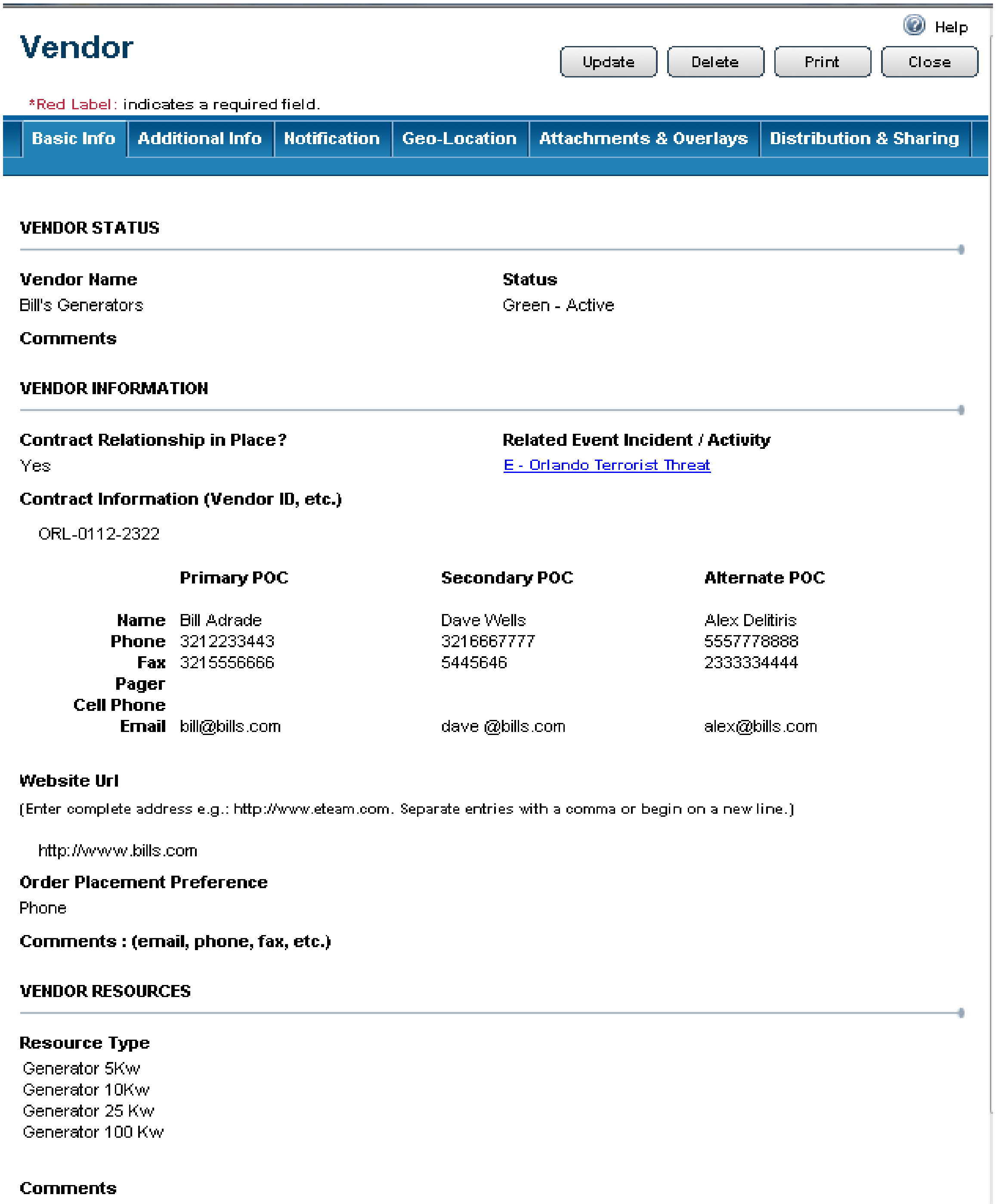


Figure 4 Selecting a Vendor Report

This action opens the Vendor Report in *View* mode as shown in Figure 5.

Scroll down to view the entire form.



Vendor

Help

Update Delete Print Close

*Red Label: indicates a required field.

Basic Info | Additional Info | Notification | Geo-Location | Attachments & Overlays | Distribution & Sharing

VENDOR STATUS

Vendor Name	Status
Bill's Generators	Green - Active

Comments

VENDOR INFORMATION

Contract Relationship in Place?	Related Event Incident / Activity
Yes	E - Orlando Terrorist Threat

Contract Information (Vendor ID, etc.)

ORL-0112-2322

	Primary POC	Secondary POC	Alternate POC
Name	Bill Adrade	Dave Wells	Alex Delitiris
Phone	3212233443	3216667777	5557778888
Fax	3215556666	5445646	2333334444
Pager			
Cell Phone			
Email	bill@bills.com	dave @bills.com	alex@bills.com

Website Url

(Enter complete address e.g.: http://www.eteam.com. Separate entries with a comma or begin on a new line.)

http://www.bills.com

Order Placement Preference

Phone

Comments : (email, phone, fax, etc.)

VENDOR RESOURCES

Resource Type

Generator 5Kw
Generator 10Kw
Generator 25 Kw
Generator 100 Kw

Comments

Figure 5 Vendor Report in *View* Mode

The Vendor Report form contains the following:

- Vendor Status
- Vendor Information
- Vendor Resources
- Operational Details (Additional Info tab)

In addition, the Vendor Report form contains tabs with the system's common functions: Notification, Geo Location, Attachments & Overlays, and Distribution & Sharing. These functions are described in detail in the Module: Common Functions.

Deleted reports are removed from active lists but are maintained in history.

You will see the [Update] [Delete] [Print] [Close] buttons in the upper right corner of the Vendor Report screen in *View* mode depending on your system access level and the discretion of the System Administrator. Use the **Update** button to edit or add information to the report, the **Delete** button to delete the report, the **Print** button to print a copy of the report, and the **Close** button to close the report window.

3 Let's get Practical with Vendor Reports

In this section of the module, you will follow a step-by-step walk through of creating a Vendor Report. You will become familiar with the details of the Vendor Report form and gain practical experience with the type of information it can contain.

All class participants should log on to the system and follow along step-by-step with the workbook.

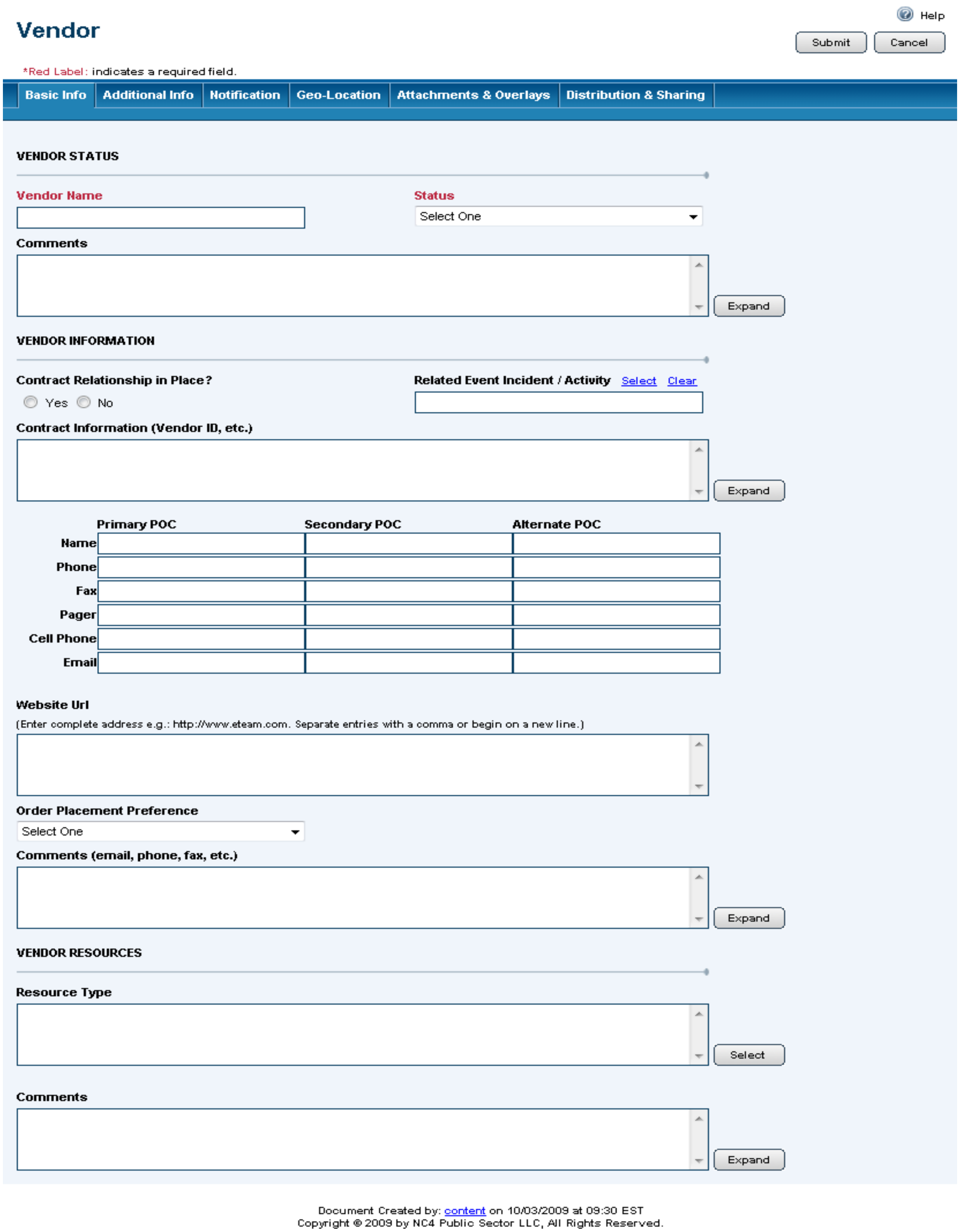
3.1 Creating Vendor Reports

To create a new Vendor Report, perform the following steps:

1 Select **Vendor** from the **Report** navigation drop down menu.

2 Click the Create button from the Vendor summary screen.

A Vendor Report opens in a new window as shown in Figure 6.



Vendor

Help

Submit Cancel

*Red Label: indicates a required field.

Basic Info | Additional Info | Notification | Geo-Location | Attachments & Overlays | Distribution & Sharing

VENDOR STATUS

Vendor Name

Status: Select One

Comments

Expand

VENDOR INFORMATION

Contract Relationship in Place? Yes No

Related Event Incident / Activity Select Clear

Contract Information (Vendor ID, etc.)

Expand

	Primary POC	Secondary POC	Alternate POC
Name			
Phone			
Fax			
Pager			
Cell Phone			
Email			

Website Url

(Enter complete address e.g.: http://www.eteam.com. Separate entries with a comma or begin on a new line.)

Order Placement Preference: Select One

Comments (email, phone, fax, etc.)

Expand

VENDOR RESOURCES

Resource Type

Select

Comments

Expand

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*Red Label indicates a required field.

Figure 6 Vendor Report in Create Mode

3.2 Basic Info

We will cover each unique section in the Vendor form.

3.2.1 Vendor Status

This section contains the fields that describe the vendor's name and status. Required fields are indicated by a red asterisk (*), as shown in Figure 7.

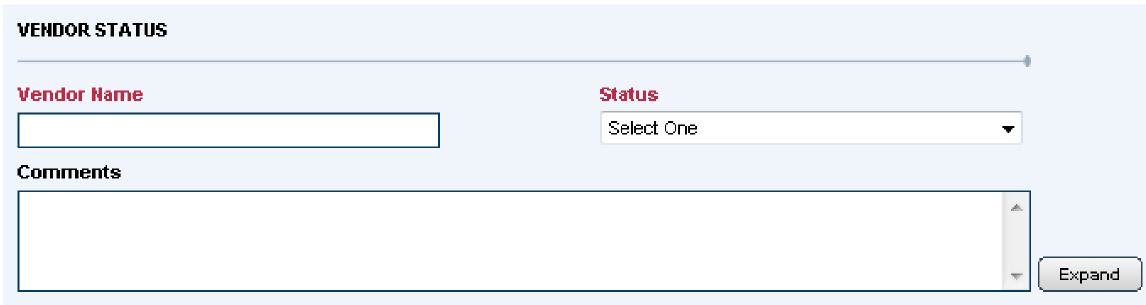


Figure 7 Vendor Status Fields

3.2.1.1 VENDOR NAME

Key in the vendor name in the required field, as shown in Figure 8.

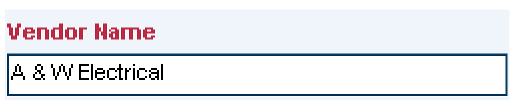
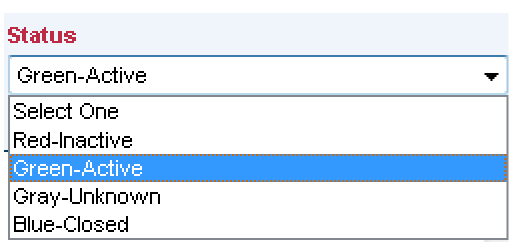


Figure 8 Vendor Name Field

3.2.1.2 STATUS

Select a status code from the Status drop down menu, as shown in Figure 9.



Your System Administrator maintains the status lists.

Figure 9 Status Drop Down Menu

3.2.1.3 COMMENTS

Key in any comments in the **Comment** field to provide important additional information regarding this vendor, as shown in Figure 10.

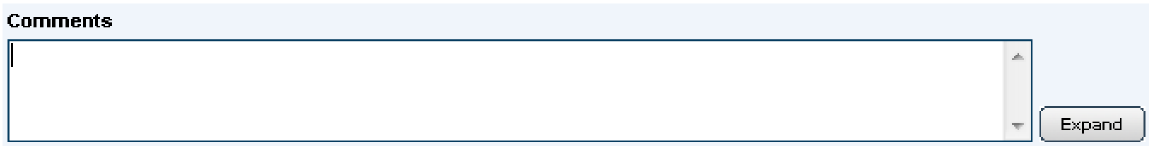


Figure 10 Comments Field

If you need more space, you can click the **Expand** button to open the **Expanded Text Window**, as shown in Figure 11.

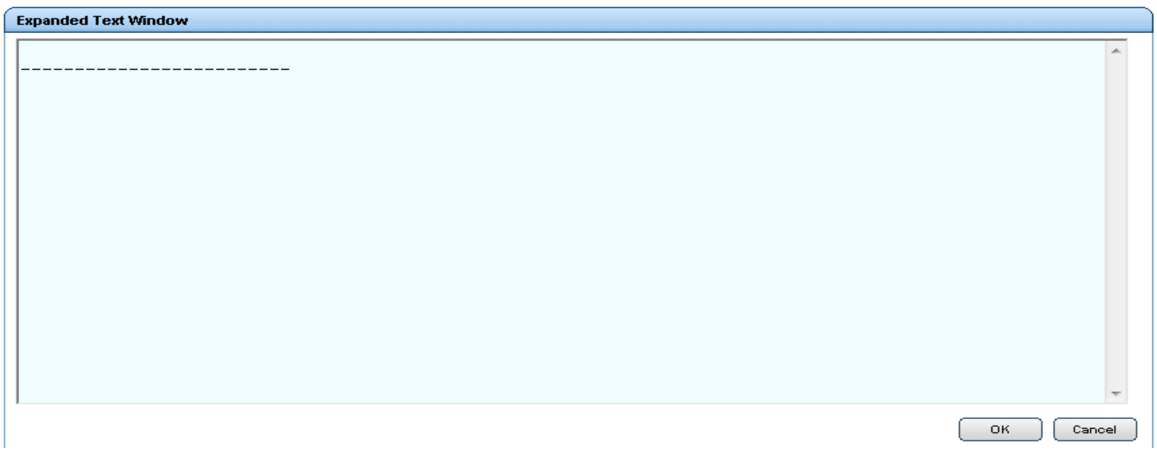


Figure 11 Expanded Text Window

Click the **OK** button to save information in the proper field.

3.2.2 Vendor Information

The Vendor Information sections contain fields that record contract information, a related event/incident/activity report, and several points of contact as shown in Figure 12.

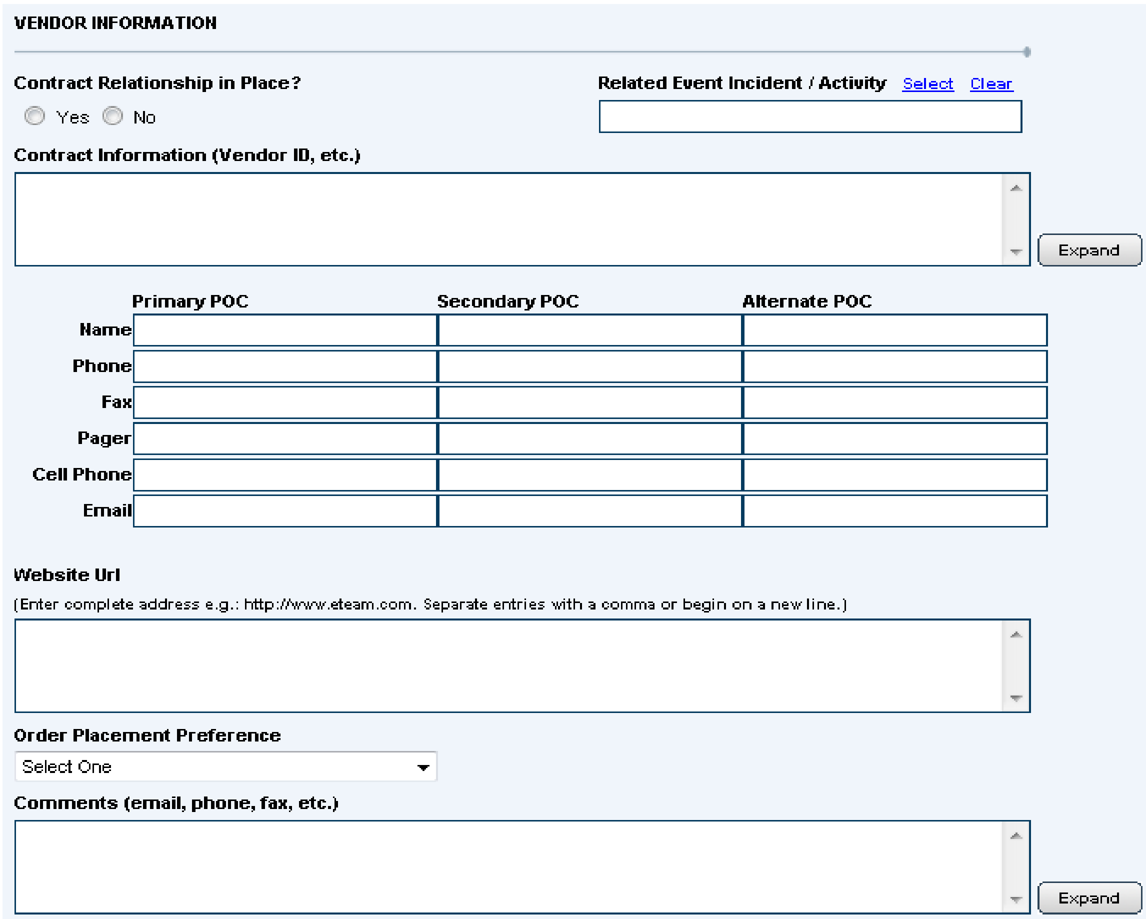


Figure 12 Vendor Information Fields

3.2.2.1 CONTRACT RELATIONSHIP IN PLACE?

Using the radio buttons, indicate whether there is an existing contract in place with this vendor, as shown in Figure 13.

Figure 13 Contract Relationship Fields

3.2.2.2 RELATED EVENT/INCIDENT/ACTIVITY

The **Related Event/Incident/Activity** field allows you to link your vendor to an existing event, incident or planned activity. To *link* one of these reports to this Vendor, click the **Select** button to open the **Related Event/Incident/Activity** options window, as shown in Figure 14. Click the Name link to add the report to the **Related Event/Incident/Activity** field.

To *unlink* a report displayed in the **Related Event/Incident/Activity** field, click the **Clear** button.

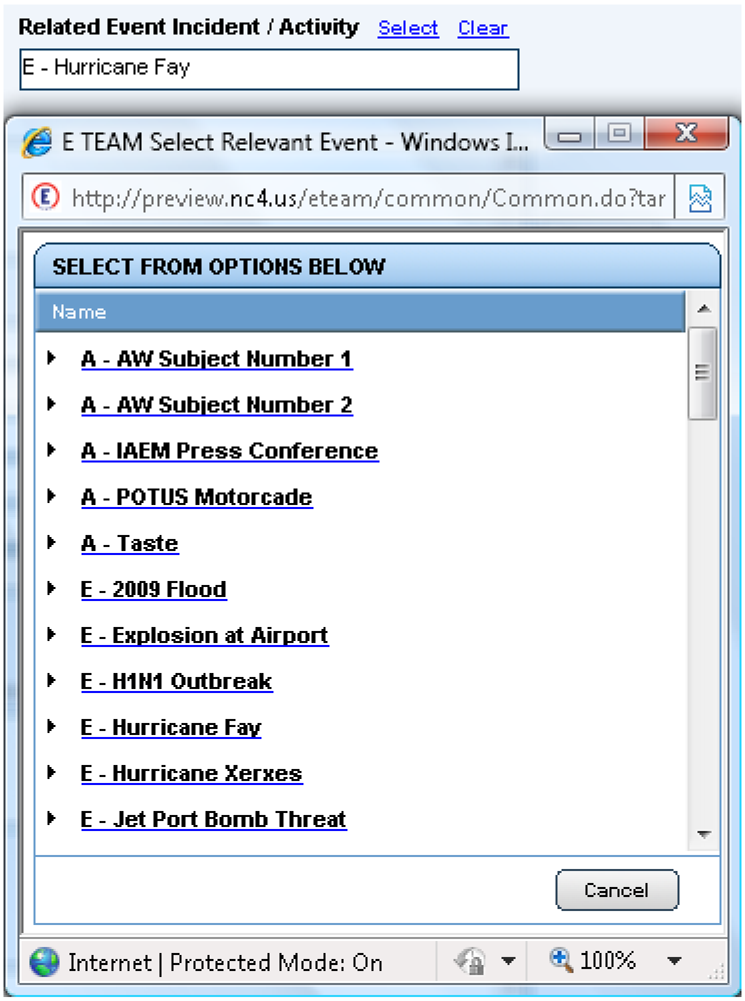


Figure 14 Select Relevant Event/Incident/Activity Window

3.2.2.3 CONTRACT INFORMATION (VENDOR ID)

In the **Contract Information** field, key in any necessary contract information including the Vendor ID as shown in Figure 15.

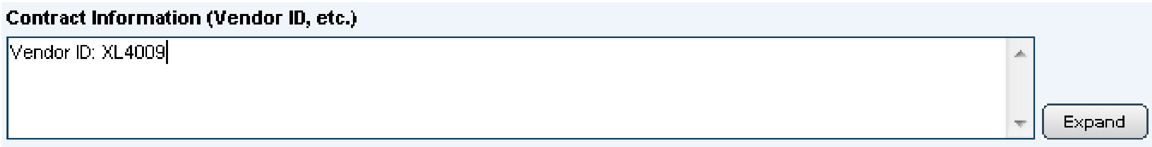


Figure 15 Contract Information Field

If you need more space, you can click the **Expand** button to open the **Expanded Text Window** as shown in Figure 11.

3.2.2.4 PRIMARY, SECONDARY AND ALTERNATE POCS

Key in the contact information, including Name, Phone, Fax, Pager, Cell Phone numbers, and Email, into the appropriate fields for a primary, secondary, and alternate point of contact (POC) as shown in Figure 16.

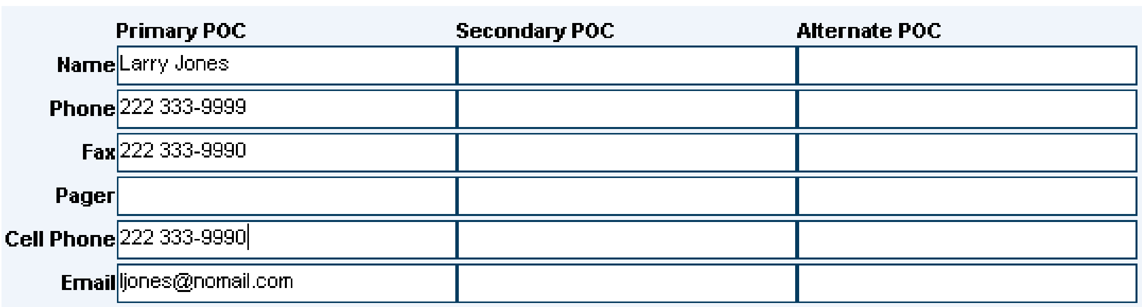


Figure 16 Point of Contact Fields

3.2.2.5 WEBSITE URL

Links to Web-based resources are added via the **Website URL** field as shown in Figure 17. Key in the URL entry, separating multiple entries with a comma or a line break.

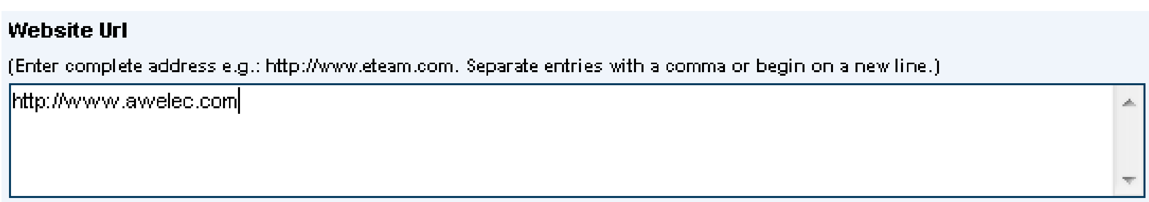


Figure 17 Website URL Field

3.2.2.6 ORDER PLACEMENT PREFERENCE

Select the **Order Placement Preference** for the vendor from the drop down menu as shown in Figure 18.

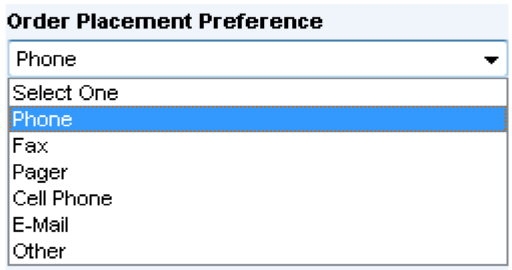


Figure 18 Order Placement Preference Field

3.2.2.7 COMMENTS

Key in any additional information including contact information not previously entered for the vendor as shown in Figure 19.

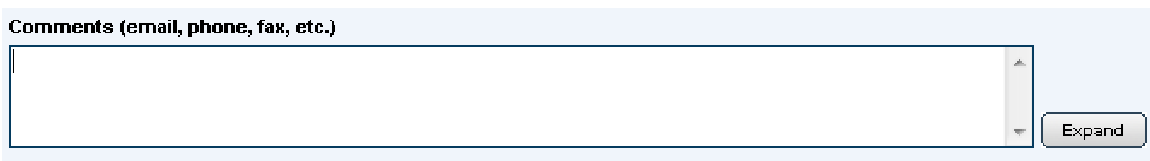


Figure 19 Comments Field

If you need more space, you can click the **Expand** button to open the **Expanded Text Window** as shown in Figure 11.

3.2.3 Vendor Resources

The Vendor Resources section contains fields identifying the resource type as well as any additional comments for the resource as shown in Figure 20.

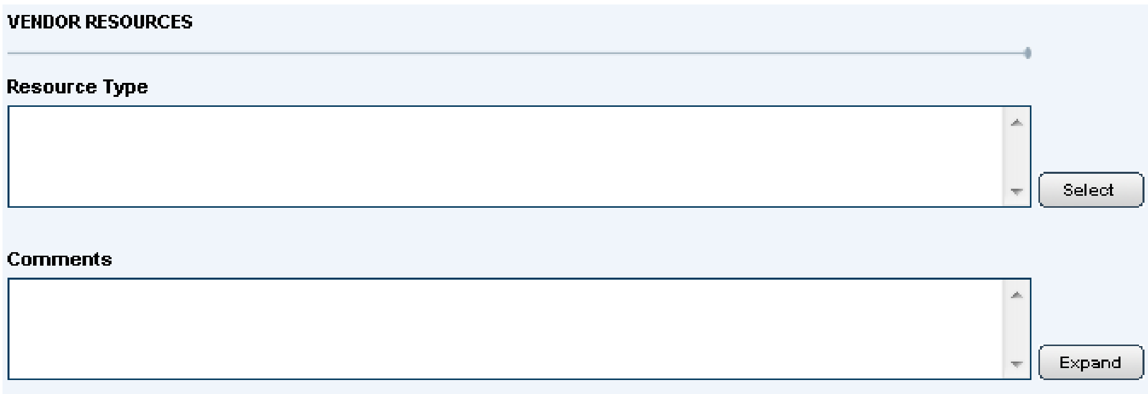
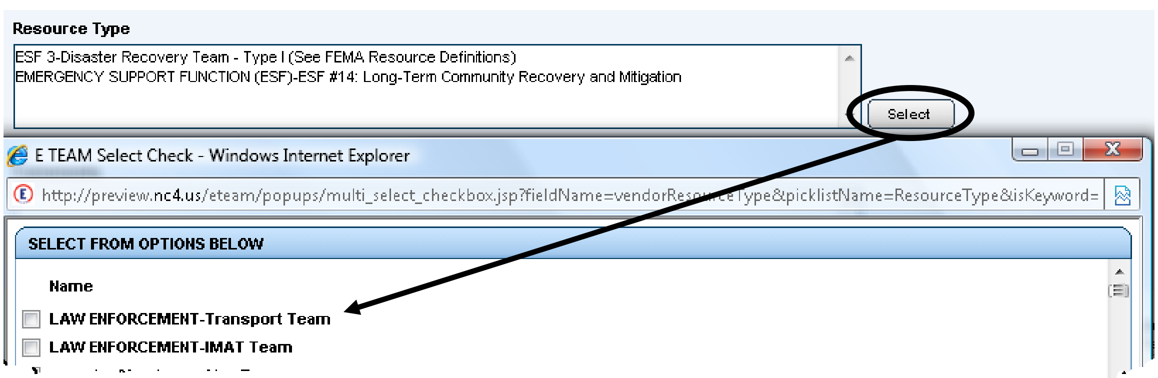


Figure 20 Vendor Resource Fields

3.2.3.1 RESOURCE TYPE

Select the **Resource Type** that this vendor will be supplying by clicking the **Select** button and clicking the checkbox for your selection(s) from within the **Resource Type** dialog window, as shown in Figure 21.



Click the checkboxes for as many resource types as appropriate and then click the **OK** at the bottom of the Resource Type dialog window.

Figure 21 Resource Type Field

3.2.3.2 COMMENTS

Key in any additional information regarding the resources as shown in Figure 22.

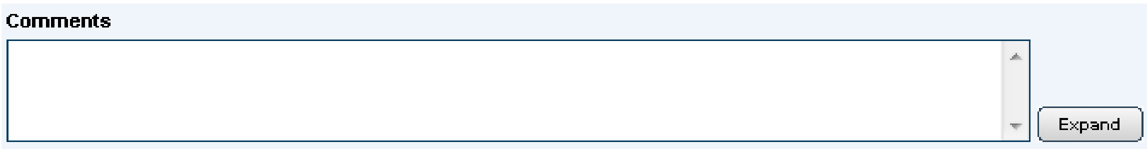


Figure 22 Comments Field

If you need more space, you can click the **Expand** button to open the **Expanded Text Window** as shown in Figure 11.

3.3 Additional Info

The **Additional Info** tab contains information about the operational readiness of the vendor to support the order fulfillment as shown in Figure 23.

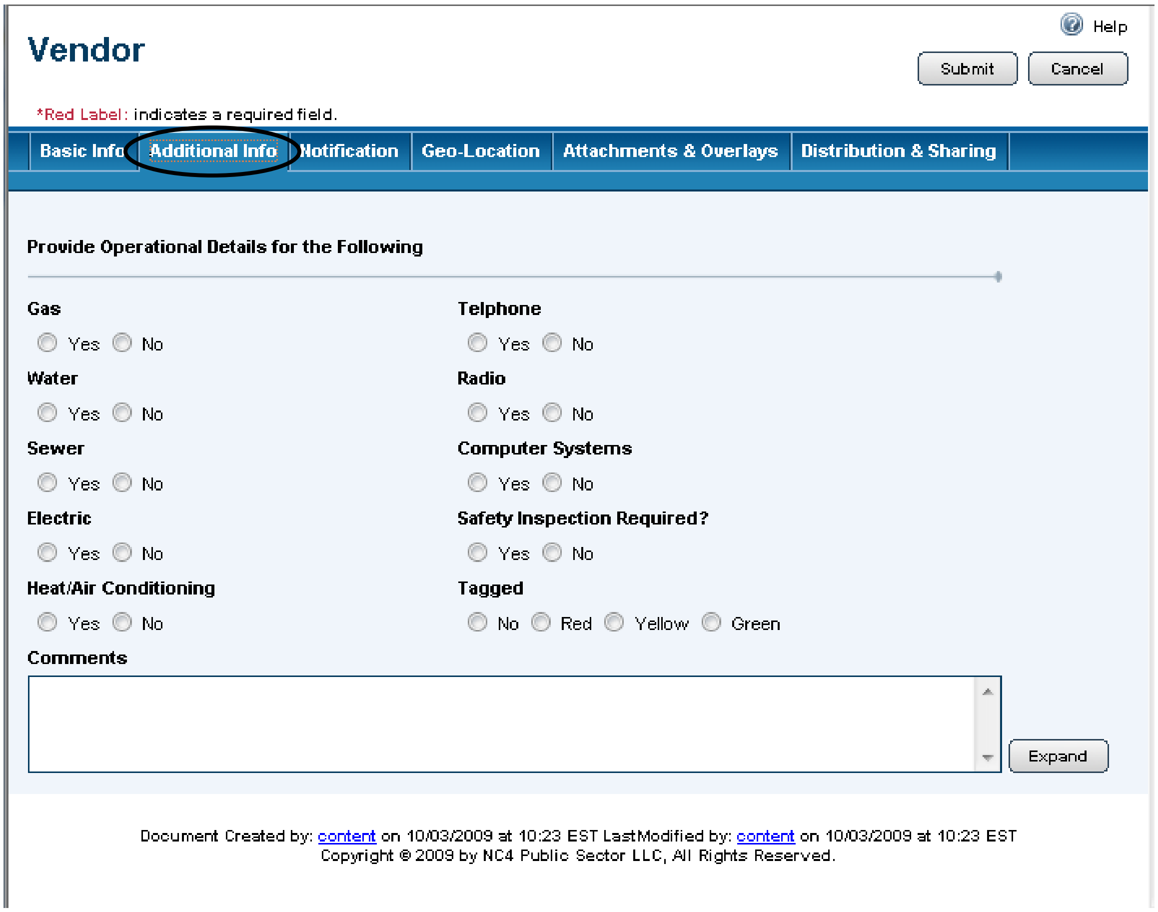


Figure 23 Additional Info Tab

3.3.1 Provide Operational Details for the Following:

In the fields for this section, indicate the status of your infrastructure that would inhibit order fulfillment, by clicking on the appropriate radio buttons, as shown in Figure 24, and keying in any additional comments into the **Comment** field as needed.

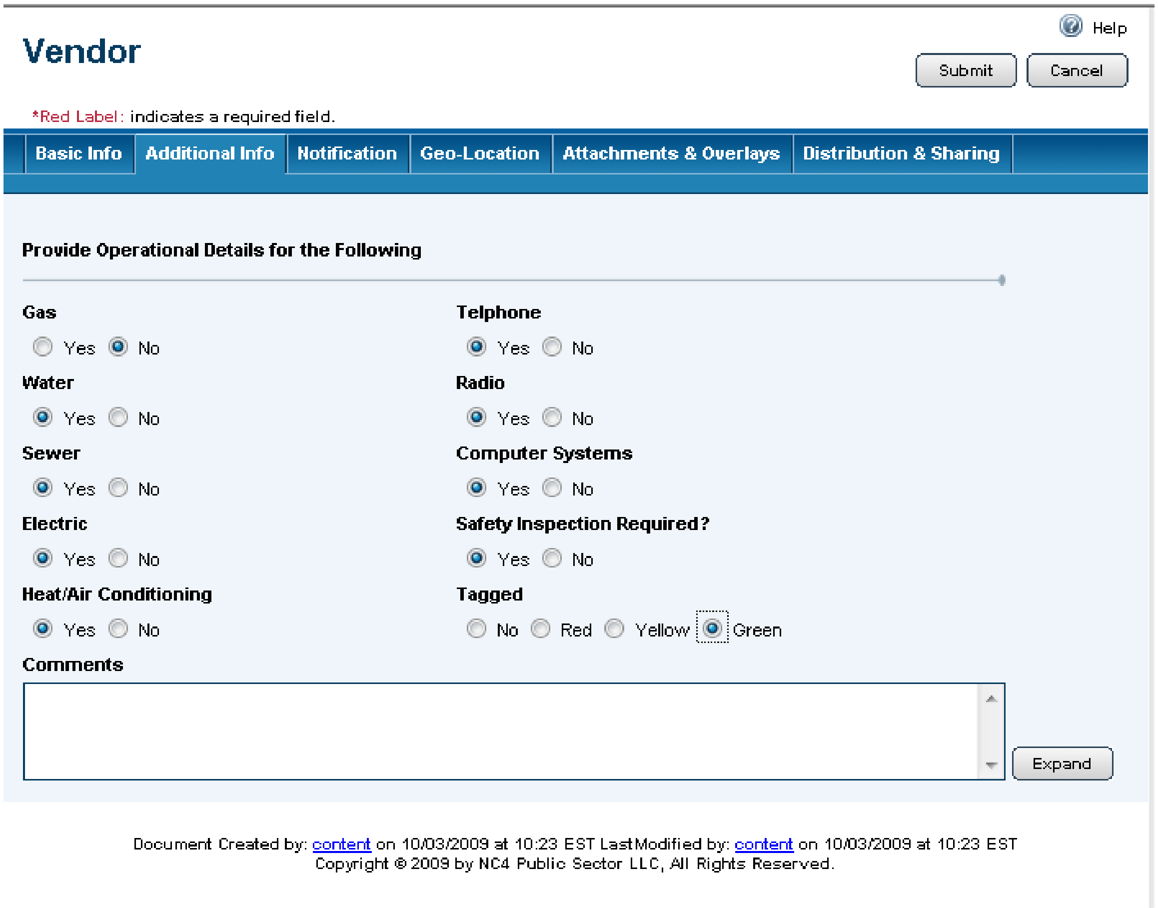


Figure 24 Operational Details Fields

If you need more space, you can click the **Expand** button to open the **Expanded Text Window**.

4 Completing a Vendor Report

The other tabs Notification, Geo Location, Attachments & Overlays and Distribution & Sharing in the Vendor Report are covered in the Module: Common Functions:

When you have completed the Vendor report with the information you have available, click the Submit button in the upper right to save it. The report is then available in *View*/Update mode

You will see the Update Delete Print Close buttons in the upper right corner of the Vendor report screen in *View* mode depending on your system access level and the discretion of the System Administrator. Use the **Update** button to edit or add information to the report, the **Delete** button to delete the report, the **Print** button to print a copy of the report, and the **Close** button to close the report window.

You can click the Close button to return to the report summary screen.

Deleted reports are removed from active lists but are maintained in history.

Review Exercise 1 - Putting it Together

This exercise allows class participants to login and create a Vendor Report.

In this Vendor form exercise you will login to the system and navigate to create a new Vendor Report.

Remember, all * red label fields are required. To complete the Vendor form, please follow the steps below:

1. **Login** to the NC4 Application.
2. Select **Vendor** from the Report navigation drop down menu.
3. Click the **Create** button from the Vendor summary screen.
4. On the new Vendor Report form, go to the **Vendor Name** field:
   a. Key in the Vendor Name.
5. Go to the **Status** field located to the right of the Vendor Name field:
   a. Click an appropriate status from the drop down menu.
6. Go to the **Comments** field located under the Vendor Name field:
   a. Key in an appropriate comment in the field.

Remember that you can click the **Expand** button to add more information in the Comment field.

7. Go to the **Contract Relationship in Place** field located in the Vendor Information category:
   a. Click the **Yes** radio button.
8. Go to the **Related Event/ Incident/Activity** field located next to the Contract Relationship in Place field:
   a. Click the **Select** Name link above the Related Event/ Incident/Activity field to open the Select Relevant Event window.
   b. Click the Name link of the Event/Incident/Activity to be related to this Vendor Report.

9. Proceed to the **Contract Information** comment box located below the Contract Relationship in Place field:

    a. Key in the contract number, vendor ID and contract expiration date.

Remember that you can click the **Expand** button to add more information in the Comment field. You can also use the copy and paste method here.

10. In the **Primary POC** section of the Vendor form located in the first column below the Contract Information field:

    a. Key in the Name, Phone number, and Email address of the vendor contact.

Remember that you can also use the copy and paste method here.

11. In the **Website URL** section of the Vendor form located under the Primary POC field:

    a. Key in the Vendor's URL address following the guidelines on the form.

Remember that you can also use the copy and paste method here.

12. Go to the **Order Placement Preference** field, located under the Website URL field.

    a. Select the appropriate information from the drop down menu in the section.

13. Go to the **Resource Type** field, located below the Comments field.

    a. Click the **Select** button located to the right of the Resource Type field to select the type of resource that you are requesting.

    b. Click the checkbox before several applicable Resource Types.

    c. Click the **OK** button at the end of the Resource Type dialog window.

14. Click the **Submit** button in the upper right of the form to enter Vendor Report into the system.

Well done! Remember to log off the NC4 Application using the Logout button.