



**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.


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### ICON KEY

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 Valuable information

 Test your knowledge

 Keyboard exercise

 Review

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## 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.

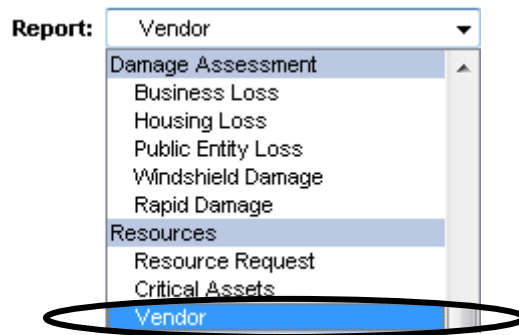


Figure 1 Selecting an Existing Vendor Report

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

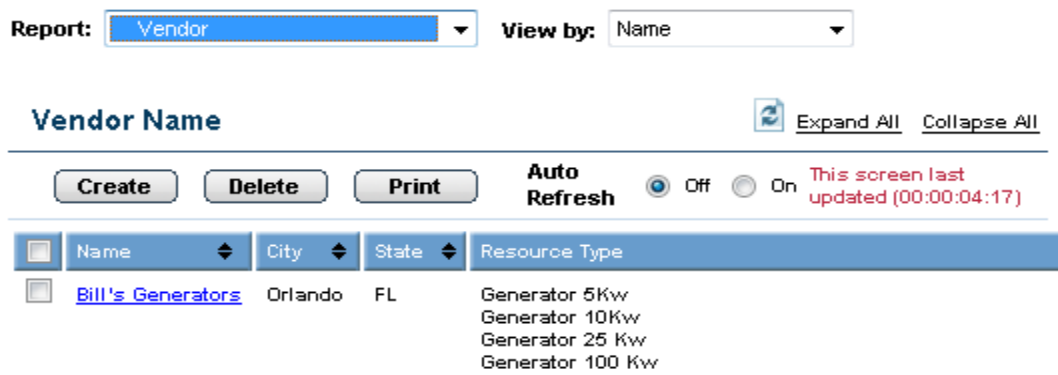



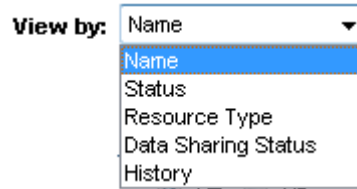


Figure 2 Vendor Report Summary Screen

### 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.



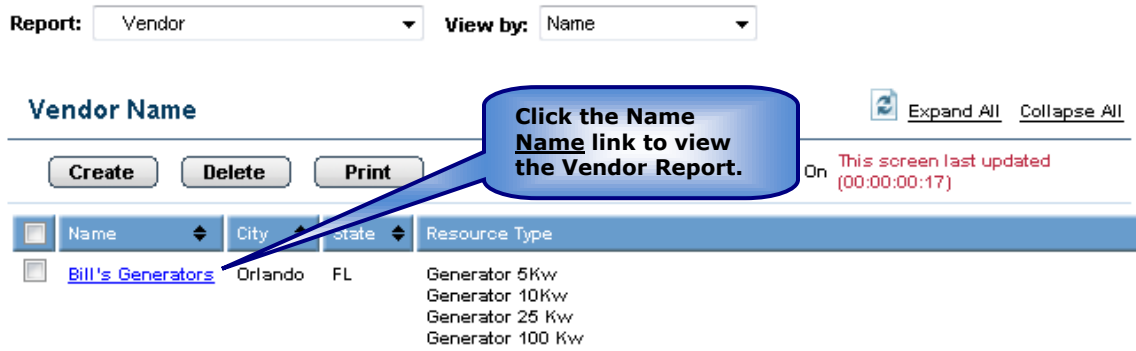
**Figure 3 Vendor Reports View by Drop Down Menu**

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

\*Red Label: indicates a required field.

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

---

**VENDOR STATUS**

<b>Vendor Name</b>	<b>Status</b>
Bill's Generators	Green - Active
<b>Comments</b>	

---

**VENDOR INFORMATION**

<b>Contract Relationship in Place?</b>	<b>Related Event Incident / Activity</b>
Yes	<a href="#">E - Orlando Terrorist Threat</a>
<b>Contract Information (Vendor ID, etc.)</b>	
ORL-0112-2322	

	Primary POC	Secondary POC	Alternate POC
<b>Name</b>	Bill Agrade	Dave Wells	Alex Deltiris
<b>Phone</b>	3212233443	3216667777	5557778888
<b>Fax</b>	3215558666	5445646	2333334444
<b>Pager</b>			
<b>Cell Phone</b>			
<b>Email</b>	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.


You will see the     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.

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



### 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  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

\*Red Label indicates a required field.

#### VENDOR STATUS

**Vendor Name**  **Status**

**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	<input type="text"/>	<input type="text"/>	<input type="text"/>
Phone	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fax	<input type="text"/>	<input type="text"/>	<input type="text"/>
Pager	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cell Phone	<input type="text"/>	<input type="text"/>	<input type="text"/>
Email	<input type="text"/>	<input type="text"/>	<input type="text"/>

**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**  
  
**Comments (email, phone, fax, etc.)**  
  
Expand

#### VENDOR RESOURCES

**Resource Type**  
  
Select

**Comments**  
  
Expand

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Figure 6 Vendor Report in Create Mode



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### 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.

The screenshot shows a form titled "VENDOR STATUS". It contains three main sections: "Vendor Name" with a text input field, "Status" with a dropdown menu currently showing "Select One", and "Comments" with a large text area. A small "Expand" button is located at the bottom right of the form.

**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.


A close-up of the "Vendor Name" field, which is a text input box containing the text "A & W Electrical". The label "Vendor Name" is positioned above the field.

**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.

A close-up of the "Status" dropdown menu. The menu is open, showing several options: "Green-Active", "Select One", "Red-Inactive", "Green-Active", "Gray-Unknown", and "Blue-Closed". The "Green-Active" option is currently selected and highlighted in blue.

 Your System Administrator maintains the status lists.

**Figure 9 Status Drop Down Menu**

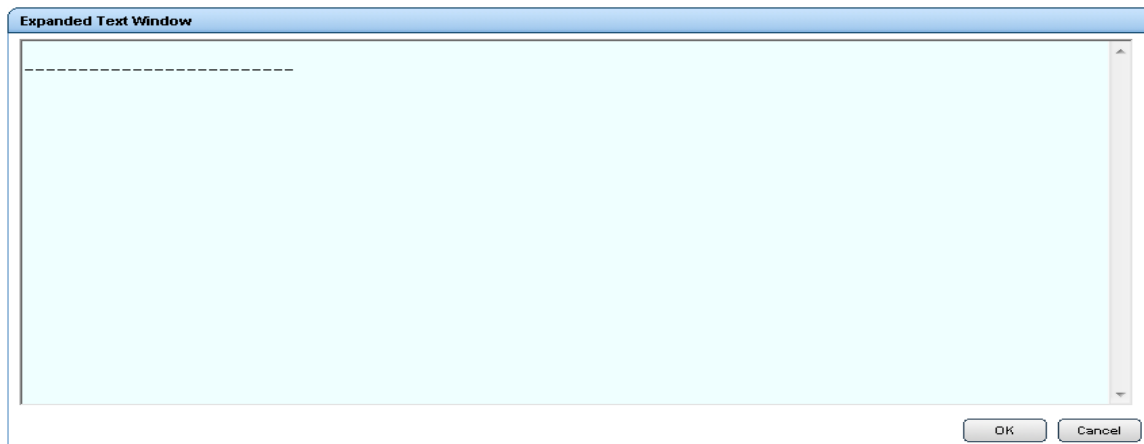
### 3.2.1.3 COMMENTS

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

The image shows a software interface element titled "Comments". It consists of a rectangular text input field with a vertical scrollbar on the right side. To the right of the text field is a button labeled "Expand".

**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.

The image shows a dialog box titled "Expanded Text Window". The main area of the dialog is a large, light blue text input field with a vertical scrollbar on the right. At the top left of the text area, there is a dashed horizontal line. At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

**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.

**VENDOR INFORMATION**

**Contract Relationship in Place?**  Yes  No

**Related Event Incident / Activity** [Select](#) [Clear](#)

**Contract Information (Vendor ID, etc.)**

	Primary POC	Secondary POC	Alternate POC
<b>Name</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Phone</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Fax</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Pager</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Cell Phone</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Email</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**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.)**

**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.

**Contract Relationship in Place?**

Yes  No

**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.

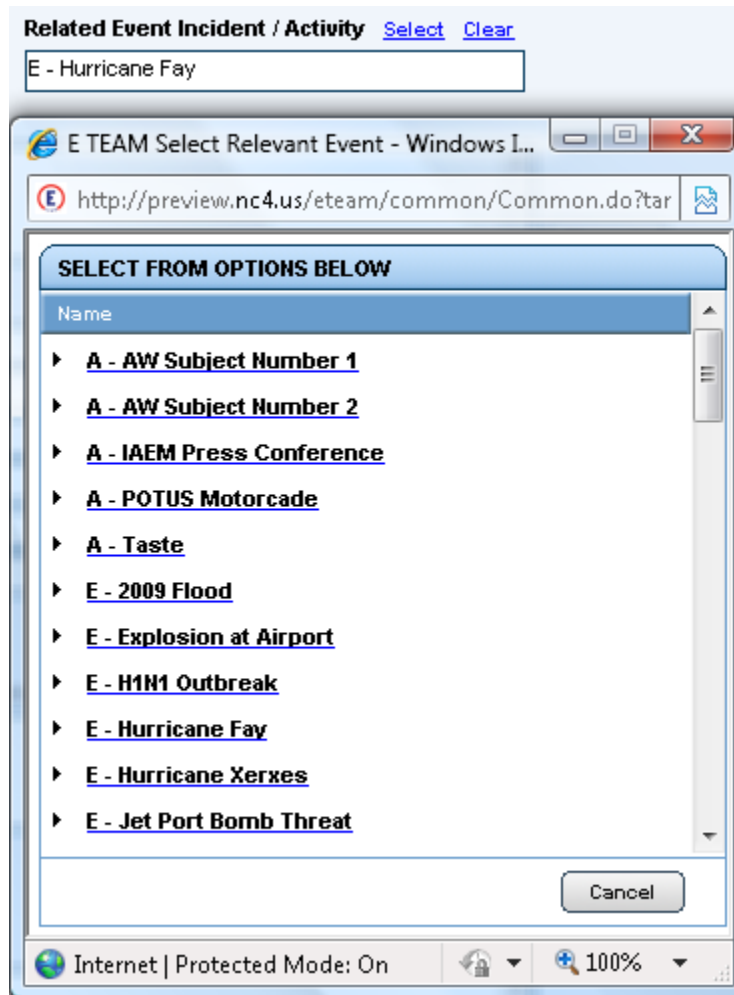


Figure 14 Select Relevant Event/Incident/Activity Window

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.

**Contract Information (Vendor ID, etc.)**

Vendor ID: XL4009

Expand

**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.

	Primary POC	Secondary POC	Alternate POC
<b>Name</b>	Larry Jones		
<b>Phone</b>	222 333-9999		
<b>Fax</b>	222 333-9990		
<b>Pager</b>			
<b>Cell Phone</b>	222 333-9990		
<b>Email</b>	ljones@nomail.com		

**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.

**Website Url**

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

http://www.avelec.com

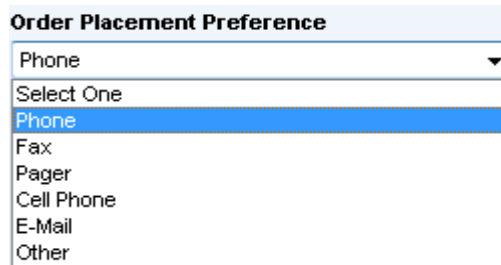
**Figure 17 Website URL Field**





### 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.



The image shows a dropdown menu titled "Order Placement Preference". The menu is open, displaying a list of options: "Phone", "Select One", "Phone", "Fax", "Pager", "Cell Phone", "E-Mail", and "Other". The "Phone" option is currently selected and highlighted in blue.

**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.



The image shows a text input field with the label "Comments (email, phone, fax, etc.)". The field is currently empty. To the right of the field is a button labeled "Expand".

**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.

The screenshot shows a form titled "VENDOR RESOURCES". It contains two main sections: "Resource Type" and "Comments". Each section has a text input field and a button to its right. The "Resource Type" button is labeled "Select", and the "Comments" button is labeled "Expand".

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.

The screenshot shows a dialog window titled "Resource Type" with a "Select" button circled in red. Below the dialog is a browser window showing a "SELECT FROM OPTIONS BELOW" dialog. This dialog has a table with the following content:

Name
<input type="checkbox"/> LAW ENFORCEMENT-Transport Team
<input type="checkbox"/> LAW ENFORCEMENT-IMAT Team

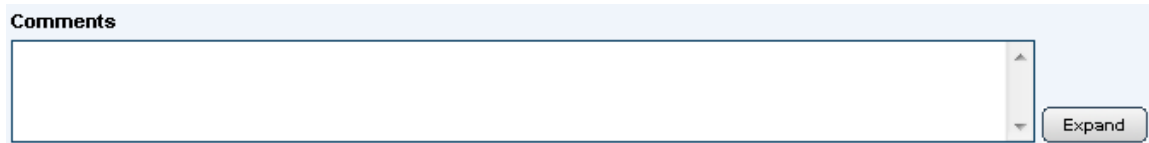
An arrow points from the "Select" button in the "Resource Type" dialog to the "LAW ENFORCEMENT-Transport Team" checkbox in the "SELECT FROM OPTIONS BELOW" dialog.

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.



The image shows a screenshot of a software interface. At the top left, the word "Comments" is written in a small, bold, black font. Below it is a large, empty text input field with a thin black border and a vertical scrollbar on the right side. To the right of the text field is a small, rectangular button with rounded corners and a light gray background, containing the word "Expand" in a small, black font.

**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.

**Vendor** Help

\*Red Label: indicates a required field.

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

**Provide Operational Details for the Following**

**Gas**  
 Yes  No

**Water**  
 Yes  No

**Sewer**  
 Yes  No

**Electric**  
 Yes  No

**Heat/Air Conditioning**  
 Yes  No

**Telephone**  
 Yes  No

**Radio**  
 Yes  No

**Computer Systems**  
 Yes  No

**Safety Inspection Required?**  
 Yes  No

**Tagged**  
 No  Red  Yellow  Green

**Comments**

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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.

**Vendor**

\*Red Label: indicates a required field.

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

---

**Provide Operational Details for the Following**

**Gas**  
 Yes  No

**Water**  
 Yes  No

**Sewer**  
 Yes  No

**Electric**  
 Yes  No

**Heat/Air Conditioning**  
 Yes  No

**Comments**

**Telephone**  
 Yes  No

**Radio**  
 Yes  No

**Computer Systems**  
 Yes  No

**Safety Inspection Required?**  
 Yes  No

**Tagged**  
 No  Red  Yellow  Green

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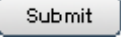
**Figure 24 Operational Details Fields**




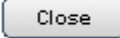
If you need more space, you can click the **Expand** button to open the **Expanded Text Window**.




## 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  button in the upper right to save it. The report is then available in *View/Update* mode


You will see the     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  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.

