PMWeb Vendor Approver

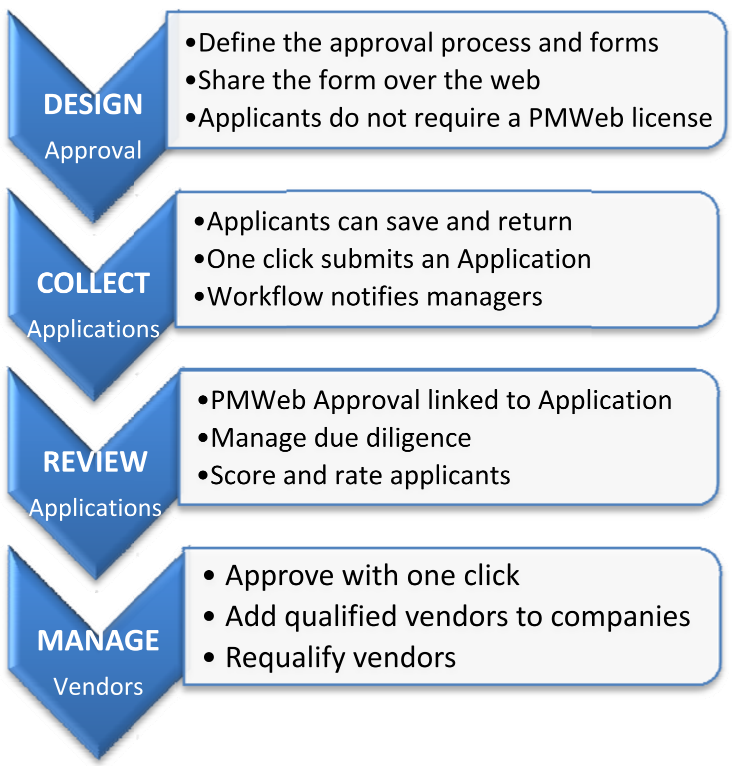
Contents

Introduction

PMWeb Vendor Approver lets you design and deploy custom application forms over the Web and automatically collect incoming application data which flows directly into your PMWeb database. Applications are reviewed, due diligence checks are documented and records are routed, all within the secure PMWeb environment. If an applicant is approved, a single click converts them to a PMWeb vendor. All of the application history remains linked to the vendor and you can even require periodic re-application using the same process.

The best part of pre-qualification with Vendor Approver is that it allows you to collect, verify and record unlimited amounts of metadata about each potential vendor: the regions in which they can work, their bonding limits, DBE information, etc. With that information at your fingertips, selecting which vendors to invite to bid becomes much easier.

Vendor Approver is seamlessly integrated with the other PMWeb modules, and provides easy to use features for you to define and create vendor approval forms, and to publish them on your PMWeb site to pre-qualify vendors. Vendor Approver enables you to manage the following tasks.



This document describes each step and highlights some of the features that make PMWeb Vendor Approver quick and efficient.

Working with Vendor Approver

Vendor Approver consists of a Designer, an Approvals portal and an online vendor application form.

Vendor Approver consists of a Designer, a Vendor Approvals portal, and an online vendor application form. In a few steps you create forms in Vendor Approver Designer. You have all the flexibility you need to:

- Design form sections
- Add custom fields and tables
- Add custom specifications

Vendor Approver is more than a forms designer. From there you publish your application form; you review and approve vendors; you manage the vendor relationship. Vendor Approver also makes re-qualification easy for you and for the vendor.

Each PMWeb deployment automatically includes a link to the vendor application portal. This makes publishing your application very straightforward.

We will highlight here the functionality contained in PMWeb Vendor Approver to perform these tasks:

- Design and publish approval applications
- Collect and review approvals
- Manage and re-qualify vendors

We will also describe PMWeb features that complement Vendor Approver to streamline the approval process.

Designing the Approval Application

Vendor Approver Designer lets you customize your application form.

Using Vendor Approver is easy and efficient. You design and publish your approval application in a few quick steps. Our Approval Designer focuses on information you want to gather for your vendors. You do not have to spend a significant amount of time designing form layouts. You simply select what sections you want to include and add any custom specifications or tables.

Custom Specifications

Specifications are user-defined data groups that let you track any metadata that you wish to store with applications. You can organize your specifications in tabs to make data entry easier for your applicants.

Custom Tables

Vendor Designer Approver takes into account the fact that you must sometimes include in your applications a way for vendors to supply tables of information. Innovative features within Vendor Approver Designer give you a lot of flexibility to create custom tables. You can define tables with:

- A fixed number of rows
- A variable number of rows for applicant-specific data
- Fields that are locked or unlocked
- Required fields

Custom Tables in Vendor Approver introduce the concept of field locking. You can lock table fields for two purposes:

- To add fixed text next to user input fields
- To add a fixed number of rows to a table

To add fixed text next to user input fields with locked fields you can make use of PMWeb lists, both system and custom.

The following data types are available for user input fields:

- Text
- Numeric
- Currency
- Date
- List
- Boolean

The Currency data type adds the default currency to the numeric value entered by the user. The Date data type allows for date input in most recognizable formats and converts the date to a standard format. The List allows you to use a PMWeb list.

Example of Custom Table with Fixed Rows

Your application might require that a vendor specify, for example, sales volume for different product categories. If you are requesting information for specific product categories, you would create a table with a fixed number of rows where the defined categories would be text labels for the sales volume information. For the sales volume you might want information about quantity as well as revenue. A sample table as it would appear in the application is shown here.

Edit Refresh

Category	UOM	Quantity	Sales Volume	In Stock	Notes
Generators		0	$	☐	
PVC Pipes		0	$	☐	
Sheet Metal		0	$	☐	
Plywood		0	$	☐	
Wiring		0	$	☐	

Figure1.– Sales Volume by Product Category

Note the ***Category*** column where there are pre-defined product categories. Category is a locked column in that table.

Example of Custom Table with Variable Rows

Your application might require tables where the applicant labels the data being entered. For example, if you request sales volume by region, you may want to leave it up to the vendor to specify the regions in a table like the one shown here.

Save Cancel

Region	Sales	Field Office
		☐
North America	$340,000	☑
South America	$210,000	☐
Europe	$140,000	☐
Africa	$120,000	☐
Middle East	$320,000	☐
Asia	$430,000	☑

Figure 2. – Sales Volume by Region

Creating this variable rows table is simple: if you do not include locked fields, then you have a variable table.

Adding Links to External Sites

You can add links to external sites to your vendor application. Each link has its own section in the application. For example to request that vendors fill out federal forms, you can give them a link to the appropriate government website. You can use the Help text in Vendor Approver Designer to give them online instructions to fill out the forms and return them to you.

Collect and Review Applications

In one click vendors submit applications. Applications are automatically collected in PMWeb Vendor Approver

Vendors gather the necessary data and enter applications from a link on your PMWeb site. You can setup a workflow to be notified of new vendor applications.

In PMWeb Vendor Approver the Vendor Approvals component collects all applications submitted by all vendors. The language we use in PMWeb Vendor Approver is as follows. Vendors submit “Applications”. From these applications Vendor Approver creates “Approval” records. This distinguishes the actual vendor entered data from what you as a manager add as part of your review process.

The first screen in Vendor Approvals shows a list of approvals.

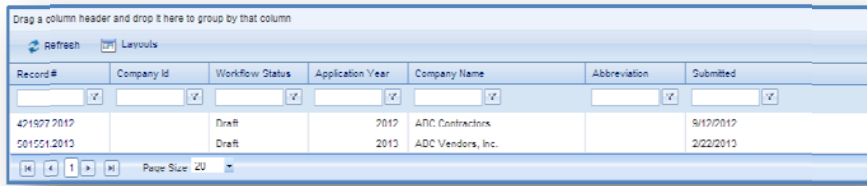


Figure3. – Vendor Approvals Applications List

Note the Company ID. Each vendor is given an external ID. When you approve them as a vendor you can add them to your company directory in PMWeb. A company ID is assigned to them at that point. That ID will be associated with their external ID for subsequent re-qualification. You do not have to re-create their information.

When you click an approval from the list shown in Figure 3 you open an approval page. From there you perform your review and notify the vendor of your decision. There are different IDs associated with a vendor application. ***Account#*** is the external ID associated with the vendor. All applications submitted by this vendor will have an ID based on this account number. Our numbering scheme accounts for one vendor application per year. Keep in mind that vendors can always resubmit applications. ***Approval ID*** adds the application year to the account number and is the same as the ***Application ID***. We refer to ***Approval ID*** for the vendor data in Vendor Approvals, and to ***Application ID*** for the page showing the application as submitted by the vendor.

Note these fields on the Approval page: ***Status***, ***Approval Starts***, and ***Approval Expires***. Initially, this field might say "Submitted" when the vendor submits the application. If you have a workflow defined, ***Status*** is controlled by the workflow. Otherwise, you can manually set the status. Status can be any of the following:

- Draft
- Submitted
- Returned
- Resubmitted
- Approved
- Rejected
- Withdrawn

When you approve an application, you can set a time interval or an expiration date for the approval with ***Approval Starts*** and ***Approval Expires***.

Approval Sections

Approval pages are designed in the standard PMWeb format with a header section and a tabbed section with more detailed information.

The ***Details*** tab shows the vendor address along with custom specifications defined for the application.

Tabs such as ***Addresses***, ***Contacts***, and ***Insurance*** have tables of vendor supplied information that you can edit.

From the ***Applications*** tab you can open a read-only page showing the application as it was submitted by the vendor.

On the ***Scoring*** tab you define criteria for scoring vendors, in a question and answer format. For each criterion, you assign a vendor score, maximum score and a weight. Vendor Approver calculates the weighted score. You toggle ***Use*** to determine whether or not to use the score in calculations.

Figure4. – Vendor Scoring Tab

The ***Ratings*** tab provides a mechanism for users to comment on your vendors. This is a convenient way to gather feedback from your staff on their experience with a particular vendor.

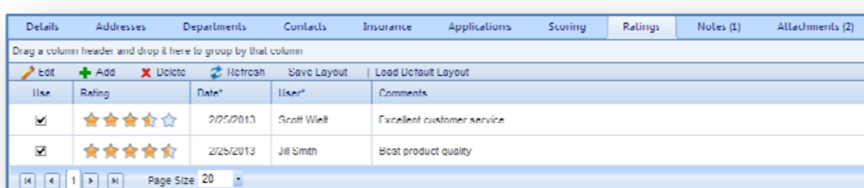


Figure5. – Vendor Ratings Tab

On the ***Notes*** tab you have all the text notes added to the application by the vendor. You can preview notes. You can add, edit or delete notes.

On the ***Attachments*** tab you have all the file attachments submitted by the vendor. You can replace an attachment with a new file. You can delete an attachment. You can edit image attachments in PMWeb Viewer.

Manage Vendors

In Vendor Approvals you review and approve vendors. One click adds them to your company directory.

Vendor approver allows you to perform the many tasks involved in qualifying vendors:

- Collecting the information they submit.
- Adding your review data to their information.
- Approving the vendors.
- Adding them to your list of qualified vendors.
- Making them accessible to your PMWeb projects.

You approve a vendor by switching the Approval status to "Approved". When you do this a ***Create Company*** button is added next to the ***Notifications*** button in the toolbar at the top of the page. When you click ***Create Company*** a confirmation dialog box opens. On that dialog, if you require that vendors re-qualify, you can set an expiration date for the approval. Click ***OK*** to create a company from the vendor data. A page opens with the vendor company record. Addresses, contacts, insurance information are transferred from the application. Notes and Attachments submitted with the application are also added to the company information. Pre-qualified vendors have a field added to their company information for approval expiration date. This is specific to pre-qualified vendors.

Re-qualify Vendors

Vendors can be made Active or Inactive at any time, permanently or temporarily.

If you set expiration dates for your vendor approvals, you might choose to re-qualify them periodically. For this you would send an invitation to the vendor to log-in to Vendor Approver and submit a new application. Mention any new qualification criteria you might have defined since the previous application. For vendor re-qualification you do not have to re-create the company information. Should you approve the vendor once more, with new approval expiration dates, these would be updated in the vendor company information. Should you instead not approve the vendor for this new application, you would simply go into the vendor company information and toggle the ***Inactive*** button.

Using Other PMWeb Features with Approvals

Vendor Approver takes advantage of many PMWeb tools.

- ***Workflows*** – You can use workflows to set up automatic notification for the approval process.
- ***Notifications*** – To route records internally about a vendor.
- ***BI Reports*** – To print out lists of approvals for given projects, categories, etc…
- ***Word Templates*** – To create templates for communicating with vendors.

As with all PMWeb modules, Vendor Approvals are directly integrated with everything else that you need to accomplish your daily work.