

OVERVIEW

VENDOR MANAGEMENT

Tracking vendor relationships is critical to every organization. It becomes difficult when vendor information is located in multiple systems, tracked in spreadsheets or may just not be available.

A vendor management solution allows users to interact with vendor information, contract details, vendor ratings, performance management, incident tracking, related documents as well as notes and task scheduling in one central location. With this type of solution, companies can standardize vendor sourcing, monitor issues and report on vendor compliance and performance.

Using an information management and automation platform like OnBase provides significant functionality beyond just managing the data pertaining to vendors. Within this platform there is a workflow engine with over 300 configurable rules and actions that makes automating transactions and events much simpler than custom coding. Any event, any change in value, any new entry can initiate a workflow for review, approval and exception processing. This workflow capability is extended to email and mobile users as well without any additional configuration. Data and case management in a configurable environment with enterprise class workflow and content management is what OnBase brings to this Vendor Management use case.

ALL STAR
SOFTWARE SYSTEMS



SUPPLIERS

OnBase formalizes the vendor request and sourcing process to improve onboarding and ensure the right data and documents are collected up front.



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STANDARDIZES VENDOR SOURCING AND IMPROVES DECISION-MAKING

OnBase formalizes the vendor request and sourcing process to improve onboarding and ensure the right data and documents are collected up front. Employees complete self-service request forms that the solution automatically routes for approval, eliminating inefficient email and phone call requests. Throughout sourcing and selection, OnBase identifies missing critical vendor details and documents such as missing proof of insurance. The system can automatically notify vendors to provide required documentation, allowing personnel to collect all needed content. A complete record helps mitigate risk of financial and civil penalties or potential reputational damage.



MAXIMIZES VENDOR RELATIONSHIPS

With OnBase, authorized personnel interact with all vendor information throughout the entire relationship – including key data, conversations and supporting documents like bank verifications and risk assessments. This secure, central access to information and supporting content eliminates information silos and time wasted switching between applications.

OnBase even integrates with your accounting system or ERP, displaying vendor service or product data alongside the content in OnBase. Staff easily locate vendor information by searching for key terms, such as vendor name, location or notes added to the file – enabling them to make smarter buying decisions. OnBase also streamlines vendor contract management, providing easy access to contracts and enabling personnel to track key terms and proactively manage milestones. Staff can upload draft contracts directly into OnBase from an email attachment in Outlook, automatically associating them with correct vendor records. The solution automatically tracks contract expirations and auto-renewals and instantly notifies appropriate personnel. This minimizes missed expirations and equips staff to review relationships to ensure they continue to provide value.

The screenshot shows the Vendor Details form for Vendor # 66, EMPIRE BUILDING. The form includes fields for Vendor Name, Vendor Type, Account Owner, Address 1, Address 2, City, State, Zip Code, Phone, Fax, Website, and Email. It also includes a section for Primary Vendor Contact with fields for Full Name, Title, Phone 1, and Email. The form is titled "Vendor Name: EMPIRE BUILDING" and "Vendor Type: BUSINESS PRODUCTS & SERVICES".

The screenshot shows the Incident Details form for Incident # 63, OFFICE SUPPLY WAREHOUSE. The form includes fields for Vendor Name, Vendor Type, Incident Type, Status, and Date of Incident. It also includes a section for Incident Details with fields for Vendor Name, Short Description, Incident Type, Detailed Description of Incident/Issue, Related PO # (if Applicable), Related Evaluation (Double-Click to View), Emergency (Check for True), Case Owner, Case Notes, and Detailed Description of Resolution. The form is titled "Incident # 63" and "Vendor Name: OFFICE SUPPLY WAREHOUSE".

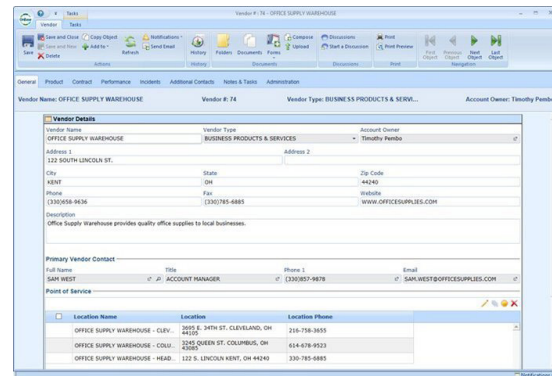
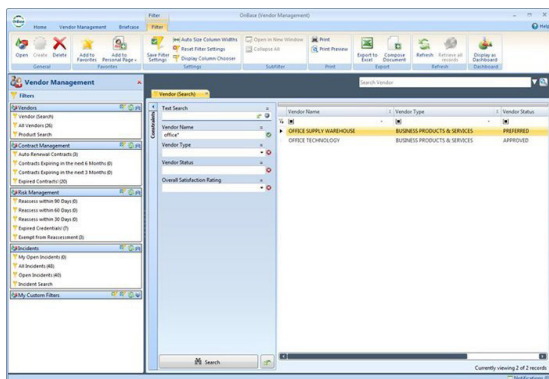
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REDUCES RISK THROUGH INCREASED VISIBILITY AND VENDOR GOVERNANCE

With OnBase organizations continually evaluate the quality of services or products provided by each vendor, enabling personnel to generate vendor scorecards and graphical performance reports on the fly. They can also record feedback or incidents, complete vendor evaluations and track preferred vendors by determining when the use of special pricing and quantity discounts is most appropriate. This creates a combined knowledgebase that supports future purchase decisions and drives discussions on whether or not to maintain specific vendor relationships.

Searching and finding data is very easy using the constrained and ad-hoc searches. Vendor records can have parent-child relationships with objects like contacts, products, incidents, notes, tasks and contracts.



Once a vendor or supporting object is being viewed and worked on, users are given access to different tools depending on their security level. Below are some of the capabilities available to the users from the ribbon bar or right click options.

- Subscribe to object which notifies user(s) upon modification of the object
- Send a link for the object via email
- View the history of the object detailing all actions with data and time stamps
- View associated documents
- Initiate any eForms to start workflows
- Compose template documents with mail merged data from the object
- Upload electronic document or scan a paper document and relate it to the object
- Initiate collaboration discussion
- Print or fax the object details

ACCELERATING Business



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