

Add/Maintain SOAR Supplier in PASS

Standard Operating Procedures

Process Steps

- SF100 – Add/Maintain SOAR Supplier in PASS

SF100 – Add a New Supplier in PASS

Overview

Purpose:

To add a new District supplier into PASS using the Supplier eForm.

Performed By:

Requester
Contract Specialist
SOAR Administrator
Supplier
Supplier Enablement System Administrator

Tools Used:

Procurement Automated Support System (PASS)
Add / Maintain SOAR Supplier eForm
Supplier Validation Template
Ariba Supplier Network (ASN)
SOAR

Technology Used:

Internet browser (e.g., Microsoft Explorer®)

Introduction

The PASS Add / Maintain SOAR Supplier eForm, which replaces the current 710 Form, is utilized for the following processes:

- Capture current supplier validated information
- Request business relationship or enable suppliers on the Ariba Supplier Network (ASN)
- Enable new supplier within PASS and SOAR
- Modify supplier, deactivate supplier, or add, and modify deactivate mail codes

SF100 – Supplier eForm – *continued*

Procedure Steps



Reference:

Refer the document, ASMP PASS Supplier Enablement Role that outlines key responsibilities of Supplier Enablement Administrative functions that include Supplier education.

1. Identify the requirements to add a new supplier in PASS.



Note: As Requestor, you can communicate the desire to add a new Supplier by inserting it as a comment to the actual requisition OR you can call your OCP Buyer. Refer to [PR500 – Add Requisition Comments and Attachments](#) for step-by-step procedural steps.

2. Contact the supplier to obtain current information such as (performed by the Requestor or Contract Specialist):
 - Current W-9 on record
 - Supplier validated information (e.g., mail codes, company profile)



Note: A data collection template, provided by ASMP or Supplier Enablement Administrator will be used to document information obtained from the vendor.

3. Log into PASS.
4. Click Create on the Swoosh.
5. Select Company eForm.
6. Select Add/Maintain SOAR Supplier eForm.



Note: Only certain PASS users will have access to the Supplier eForm. The Contracting Officer or Specialist would usually complete the form.

SF100 – Supplier eForm – *continued*

7. Provide a title for the eForm.
8. Click in the radio button next to Add Supplier. Click Next. The Vendor Information screen appears.

Note: Notice the Funds Status states “Not posted to SOAR”.

9. Verify the information (Step 2 in Process Step Area) is correct. Click Next.
10. Complete the Vendor information (Step 3 in the Process Step Area) by selecting values for fields or typing in text. Click Next.

Note: You must complete the required fields that are marked in red. The more information that is inputted, the better.

11. Complete the Address information (Step 4 in the Process Step Area) by selecting values for fields or typing in text. Click Next.
12. Complete the PASS information (Step 5 in the Process Step Area) by selecting values for fields or typing in text. Click Next.



Note: If you select 'Email' or 'Fax' for the PO Ordering Method, you must check the checkbox for the PASS Vendor.

13. Complete the Bank information (Step 6 in the Process Step Area) by selecting values for fields or typing in text. Click Next.
14. Complete the Justify information (Step 7 in the Process Step Area) by providing a comment or adding an attachment as to why the Supplier needs to be added. Click Next.

SF100 – Supplier eForm – *continued*

15. Review the Approval Flow (Step 8 in the Process Step Area). Click Next.
16. Review at the Summary level. Continue to add information, if necessary.
17. Submit PASS Add / Maintain SOAR Supplier eForm to the Supplier Enablement Administrator for approval.



Note:

The supplier eForm will perform validation check indicating whether the Vendor currently exists in R*Stars.

If the vendor provides a DUNS number and a valid email address and fax number, and does not exist on the Ariba Supplier Network (ASN), then the supplier will be registered on the ASN.

If the vendor does not provide a DUNS number, they will be classified as a "Mail" Supplier, thus all Purchase Orders will be printed and sent via US Mail to the appropriate address.

SF100 – Supplier eForm – *continued*

Procedure Steps – Supplier Enablement Administrator

1. Log into PASS.
2. Review details of Add/Maintain SOAR Supplier eForm requesting addition of new supplier.
3. Log into the Ariba Supplier Network (ASN).
4. Perform a system search on the ASN.
5. Determine if supplier to be added already exists:
 - If Yes, request business relationship with that vendor. Exit these procedures.
 - If No, continue with Step 6.
6. Register Vendor using their DUNS number and valid email address. The supplier will be enabled and order routing will be configured.



Note:

Communication must be sent to the vendor informing them of the PASS initiative and providing them with a user name and password. Supplier must provide a valid email address.

7. Approve the eForm, which will send the eForm to the SOAR Vendor Administrator.



Note: At a minimum the information for address, city, state, country and zip code, Ariba Network ID and DUNS number are required for a successful SOAR update

Procedure Steps – SOAR Vendor Administrator

1. Log into PASS.
2. Review details of Add/Maintain SOAR Supplier eForm requesting addition of new supplier.
3. Approve the eForm, which will trigger the transaction update to SOAR.
4. Update R*Stars (PASS Automation) configured.



Note:

If there is a failure of the SOAR integration an email will be sent to the last approver, who will be reactivated to correct the error and approve the document.

5. An email is sent to the original requester, informing that the supplier exists in PASS and SOAR (PASS Automation). E.g. VM111: 'Ruff Wear Supplier – For Dogs on the Go' has been fully approved
6. Exit these procedures.