

Add/Maintain SOAR Supplier in PASS

Standard Operating Procedures

Process Steps

- SF300 – SOAR Supplier
Maintenance Request in
PASS – Maintain Supplier

SF300 – Supplier eForm

Overview

Purpose:

To deactivate District suppliers from PASS and subsequently SOAR using the Supplier eForm.

Performed By:

Requester
Contract Specialist
SOAR Administrator
Supplier
Supplier Enablement System Administrator
LSDBE 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

SF300 – 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 modify an existing supplier in PASS.



Note: The reasons for deactivation could include, but are not limited to – Supplier going out of business, bad standing of supplier...

2. Log into PASS.
3. Click Create on the Swoosh.
4. Select Company eForm.
5. 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.

6. Provide a title for the eForm.
7. Click in the radio button next to Maintain Supplier. Also select the Name of the vendor, whose details you want to modify, Click Next. The Vendor Information screen appears.

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

8. Verify the information (Step 2 in Process Step Area) is correct. Click Next.
9. Confirm the Vendor information (Step 3 in the Process Step Area). Click Next.



Note: You will not be able to make any changes to most of the fields, but the supplier related fields would be displayed

SF300 – Supplier eForm – *continued*

10. Confirm address and Click Next.
11. Confirm PASS information (Step 5 in the Process Step Area). Click Next.
12. View the Bank information (Step 6 in the Process Step Area). Click Next.



Note: There is a specific Role called as 'View SOAR Bank Info'. This role allows the user to see and modify the direct deposit information of the vendor (If the vendor chooses to be paid via a direct deposit). This is a restricted role and very few users (from OFOS) have this role (e.g. Christine Hagans)

13. 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 deactivated. Click Next.
14. Review the Approval Flow (Step 8 in the Process Step Area). Click Next.
15. Review at the Summary level.
16. Submit the Supplier eForm to the Supplier Enablement Administrator for approval

SF300 – Supplier eForm – *continued*

Procedure Steps – Supplier Enablement Administrator

1. Log into PASS.
2. Review details of SOAR Supplier Maintenance Request eForm requesting deactivation of new supplier.
3. Log into the Ariba Supplier Network (ASN)
4. Make the required changes. You might want to remove the relationship that exists between the Supplier and the District on the ASN
5. Approve the eForm, which will send the eForm to the SOAR Vendor Administrator.

SF300 – Supplier eForm – *continued*

Procedure Steps – SOAR Vendor Administrator

1. Log into PASS.
2. Review details of SOAR Supplier Maintenance Request eForm requesting deletion of the 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
6. Exit these procedures.