Chapter 16 – CRO Vendor Administration - General

Contents

Vendor Record Information

Prime contractors, subcontractors, and DBEs must self-register on the Alaska DOT&PF AASHTOWare Vendor List. They do this by registering in IRIS VSS and entering a commodity code of 913. IRIS will push information for vendors with the correct commodity code into AASHTOWare Project (AWP) nightly. Once a vendor is on the AWP Vendor List, they are set and do not need register again. Valid AWP vendor records are required for DOT&PF to process bids, for contractors and subcontractors to be able to register on the plan holder's list, and for contractor payments to push from the AWP Construction & Materials module back into IRIS.

DOT&PF personnel cannot create new vendor records in AWP. Vendor records must be initiated by the IRIS VSS interface. Once the vendor record has been created in AWP, DOT&PF staff can add more information or modify information as necessary.

The CRO Vendor Admin-General role has the ability to edit general information, address information, and work capacity information. This role also has read only access to the vendor's officer information and the vendor's DBE work code and work location information.

There are five (5) address types in AWP: Bidding, DBE, Mailing, Payment, and Physical (*Figure 16.1*).

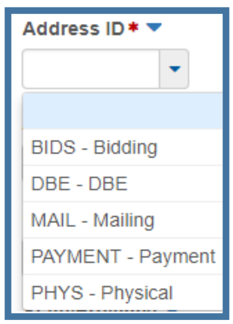

Figure 16.1

The address information that is transferred from IRIS creates two (2) address type records in AWP – Payment and Bids.

The Payment address should never be altered – this is what will be used for transferring contractor payment information from AWP Construction & Materials to IRIS. This is the only address information that will be updated in AWP automatically if a contractor modifies their address information in IRIS.

The ***Bids*** address information will be altered as needed only by users with the Precon Vendor Admin role. The Bids address type is required for a contractor to be able to electronically submit a bid via the Bid Express service and the Bids address type information is what populates the plan holder's list address information. The email address entered in this address type will receive the Notify Plan Holders emails that DOT&PF sends out through AWP when addenda or notices to bidders are issued. Contractors can call the regional contracts offices to have the address or email information in the Bids address type changed.

The ***DBE*** address is added and maintained by the Civil Rights Office and is what is used to designate DBEs that register on the plan holder list within seven (7) days as a mandatory contact.

The ***Mailing*** address type is purely informational and can be added by any of the Vendors Admin roles if any want to have this information. It is not populated by IRIS and does not interact with any other part of AWP or interface.

The ***Physical*** address type is purely informational and can be added by by any of the Vendors Admin roles if any want to have this information. It is not populated by IRIS and does not interact with any other part of AWP or interface.

General Info

The General tab houses basic information about the vendor (*Figure 16.2*). Some information is pushed from IRIS when the vendor registers. Those fields are: Vendor ID, Vendor Name, Corporation Type, and Vendor Established Date. There should never be a need to modify the information on this tab.

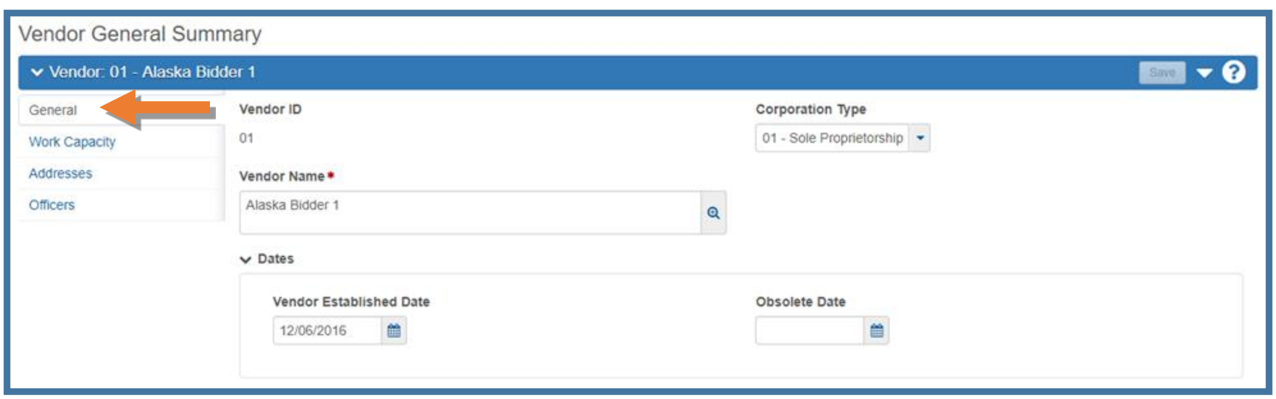

Figure 16.2

Work Capacity

To add work capacity information (*Figure 16.3*):

1. (A) Click the **Work Capacity** tab.
2. (B) From the **State of Incorporation** dropdown, select the appropriate state.
3. (C) In the **Year of Incorporation** field, enter the year the company was incorporated.
4. (D) From the **Education Level of Owner** dropdown, select the appropriate education level.
5. (E) From the **Range Annual Gross Receipt** dropdown, select the appropriate annual gross receipt range for the vendor.
6. (F) In the **Bond Limit** field, enter the bond limit for the vendor.
7. (G) Click the **Range Annual Gross Receipt Received Date calendar icon** and select the appropriate date.
8. (H) Click **<Save>**.

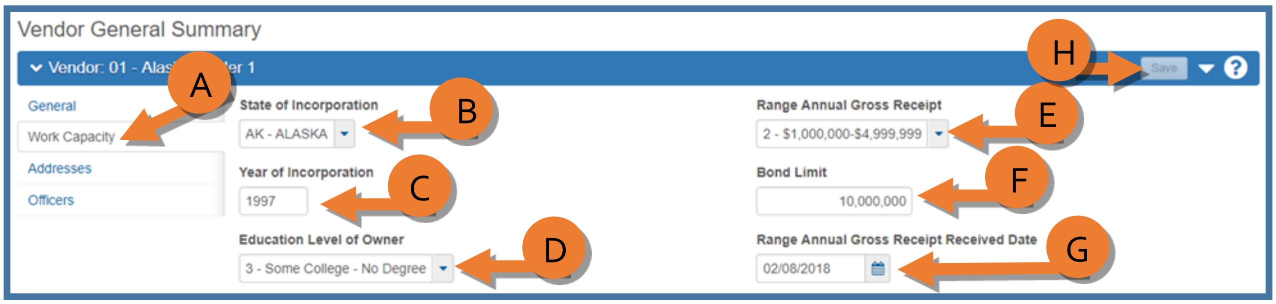

Figure 16.3

Addresses

As stated earlier in this chapter, the Bids and Payment address types are transferred from IRIS VSS. The CRO Vendors Admin-General role can add or edit the DBE address. Mailing and Physical address types are not used in any interface or in any other part of AWP, but it may be useful to store these addresses for contractors.

NOTE: Address records cannot be deleted once created.

To create a new address type (*Figure 16.4*):

1. (A) Click the **Addresses** tab.
2. (B) Click the **<New>** button.

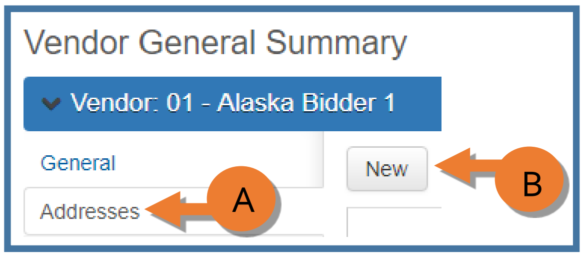

Figure 16.4

A new address record will appear at the bottom of the current addresses (*Figure 16.5*).

3. (C) From the **Address ID** dropdown, select DBE (or Mailing or Physical).
4. (D) In the **Address** field, enter the street address or P.O. Box number.
5. (E) In the **City** field, enter the name of the city for the address.
6. (F) From the **State/Province** dropdown, select the appropriate state.
7. (G) In the **Zip Code** field, enter the applicable zip code for the address.
8. (H) From the **Phone Numbers Type** dropdown, select phone or fax, this is a required field. NOTE: You can only have one phone record and one fax record on each address type.
9. (I) In the **Phone Number** field, enter the phone number to be associated with this address. The Phone number field is a required field.
10. (J) In the **Email Address** field, enter the email address to be associated with this address.
11. (K) If applicable, enter the DUNS number in the **DUNS Number** field.
12. (L) Click **<Save>**.

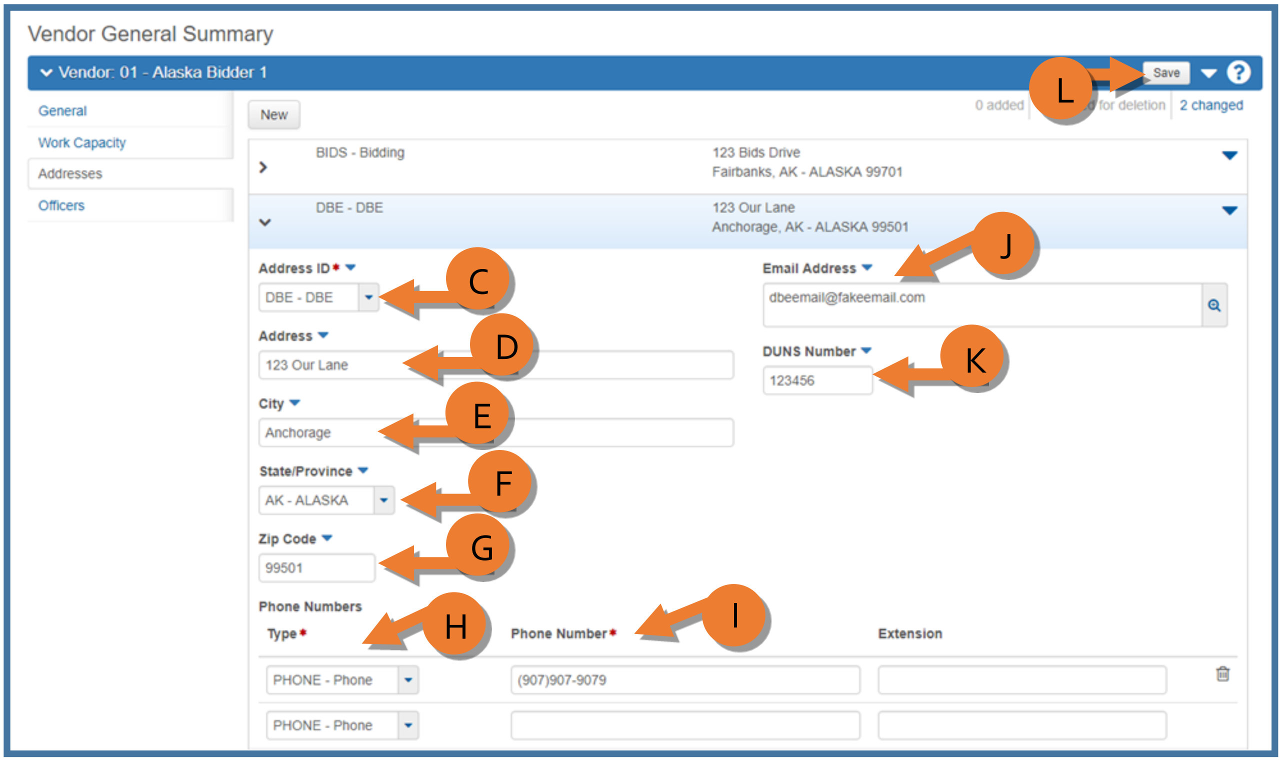

Figure 16.5

Editing Address Info

Vendor information is pulled nightly into AWP from IRIS VSS. The CRO Vendors Admin-General role does have the ability to modify some vendor information if necessary.

1. Log into AWP (see Chapter 1).
2. Make sure you are in the ***CRO Vendors Admin-General*** role (see Chapter 2 for more info on roles).
3. (*Figure 16.6*) From the Vendor Overview component on the CRO Vendors Admin-General role dashboard, (A) search for and (B) select the vendor. NOTE: A minimum of a three (3) character string is required for the system to search. You can search by Proposal ID (State/IRIS number) or the Proposal Name.

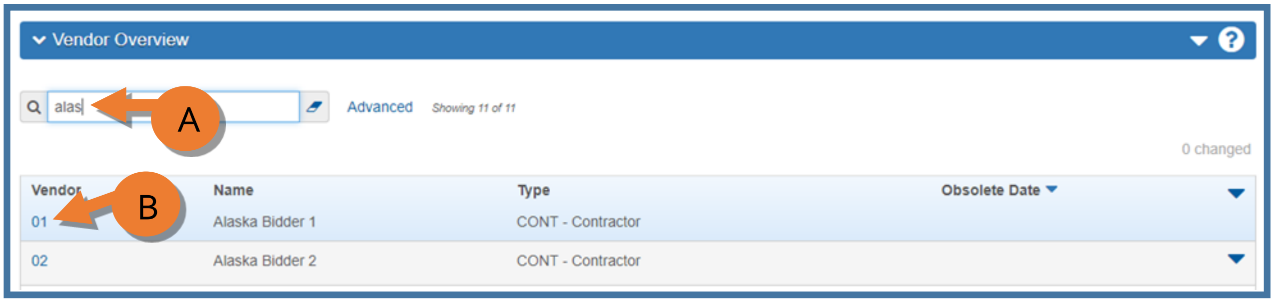

Figure 16.6

4. (C) Click the **Addresses** tab (*Figure 16.7*).
5. (D) Expand the Address record you want to modify.
6. Make modifications as needed.
7. (E) Click **<Save>**.

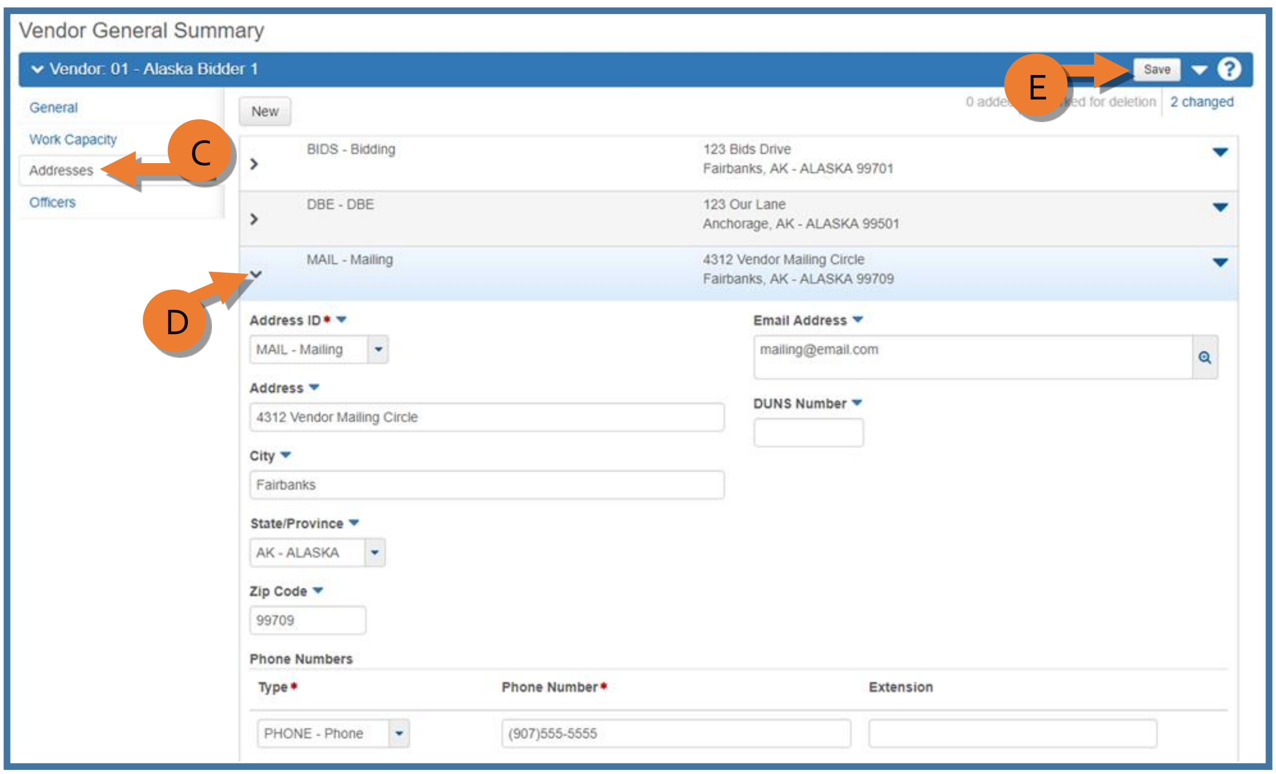

Figure 16.7

Officers

The Officers tab is read only for the CRO Vendors Admin-General role (*Figure 16.8*). This information is added/edited by CRO staff with the CRO Vendors Admin-Certification role.

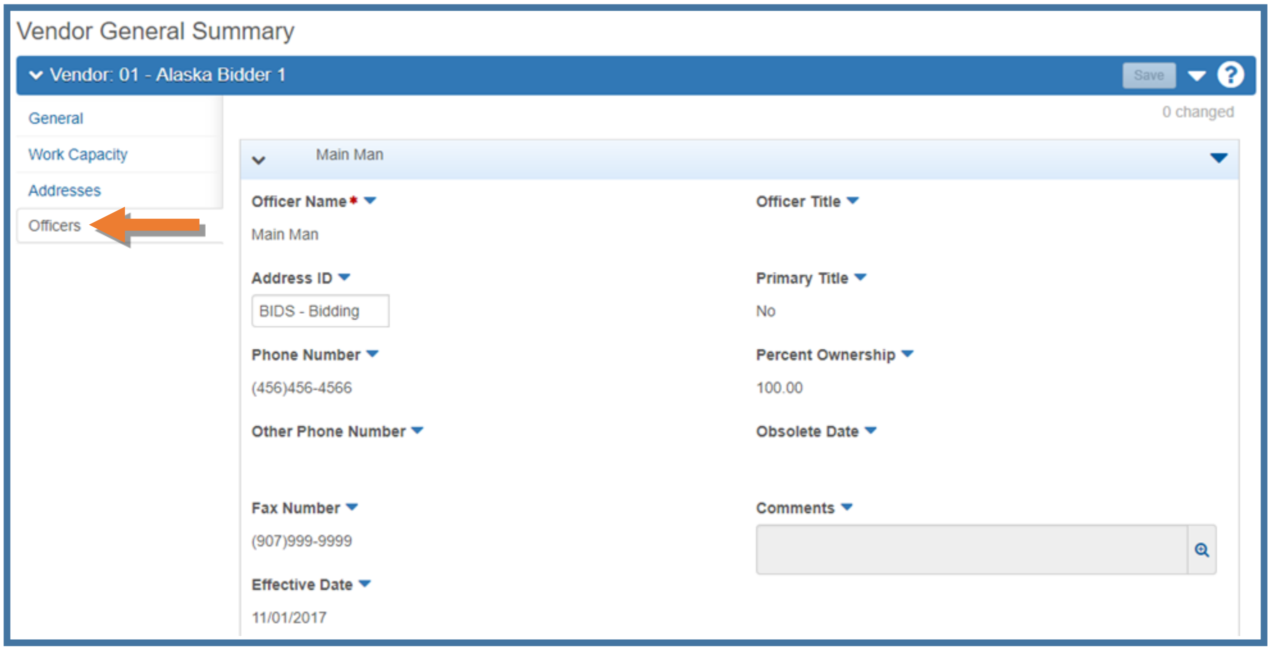

Figure 16.8

The CRO Vendors Admin-General Role cannot add or modify DBE info, but has read-only access to the work codes and work locations areas for reference.

1. To navigate from the Vendor General Summary component to the DBE area, click the **DBE** quick link at the top of the screen (*Figure 16.9*).

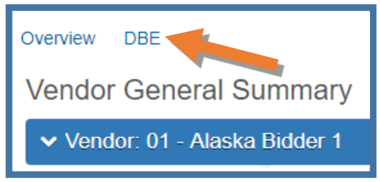

Figure 16.9

You will be taken to the Vendor DBE Summary component Work Codes tab (*Figure 16.10*). This tab contains the work codes and work categories the DBE is certified in. You can expand or collapse work code or work category records as needed to review data.

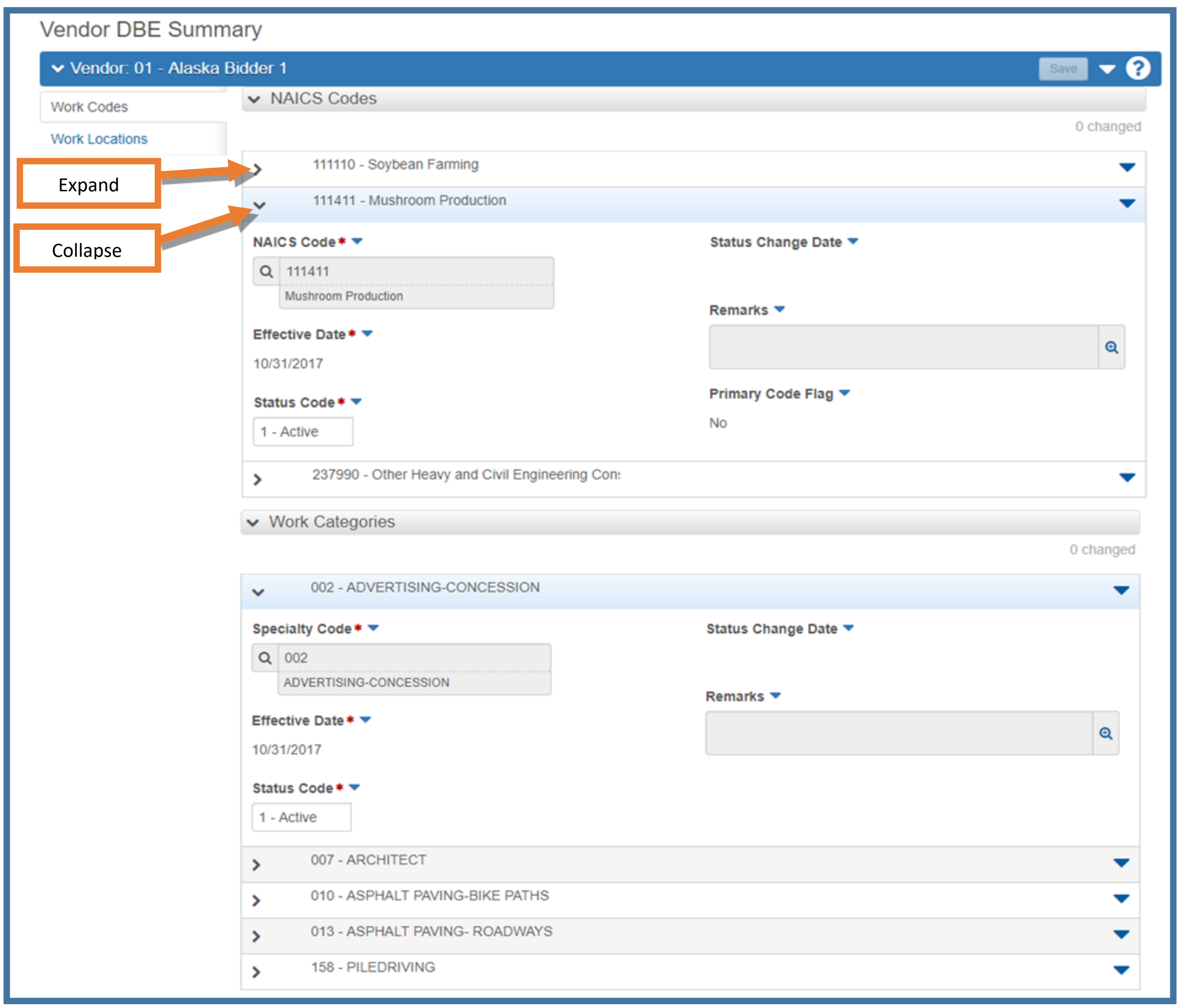

Figure 16.10

To view the work location area, click the **Work Locations** tab (*Figure 16.11*). This tab contains information about the region(s), borough(s), or out of borough area(s) the DBEs can perform work in.

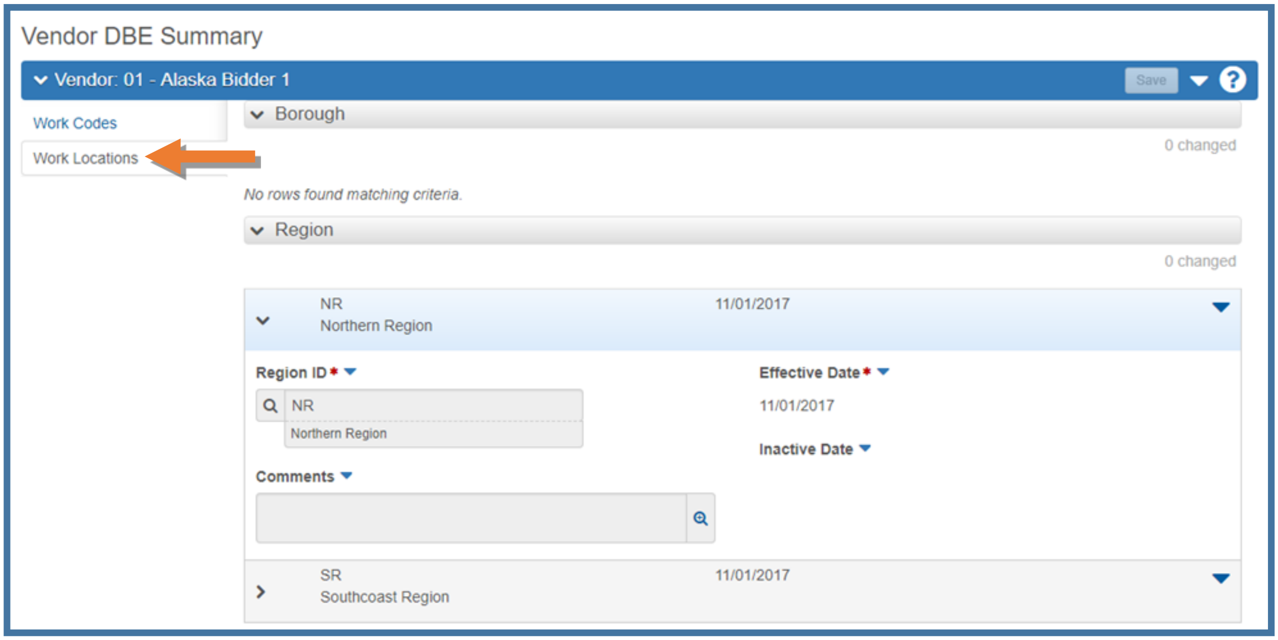

Figure 16.11

DBE Reports

The CRO Vendors Admin-General role has access to several reports from the Vendor General Summary component or the Vendor DBE Summary component (*Figure 16.12*). The reports are the same in both locations.

To generate a report:

1. (A) Expand the Vendor General Summary component **action menu**.
2. (B) Select the report you want to run.

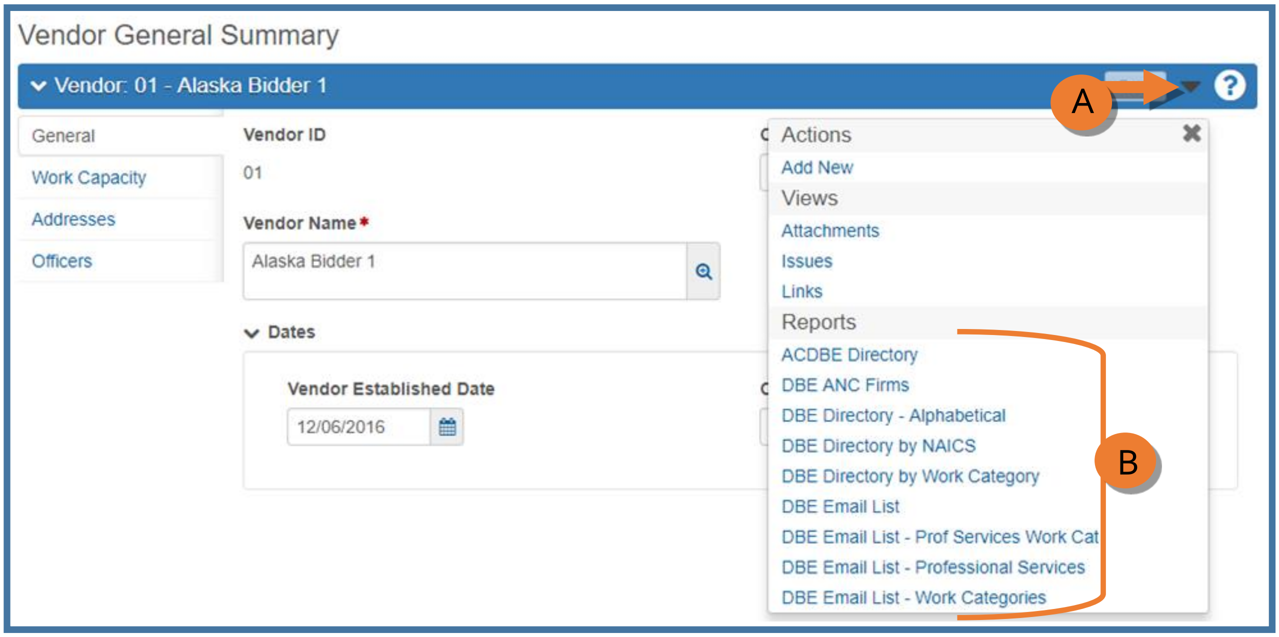

Figure 16.12

3. (C) Click **<Execute>** (*Figure 16.13*).

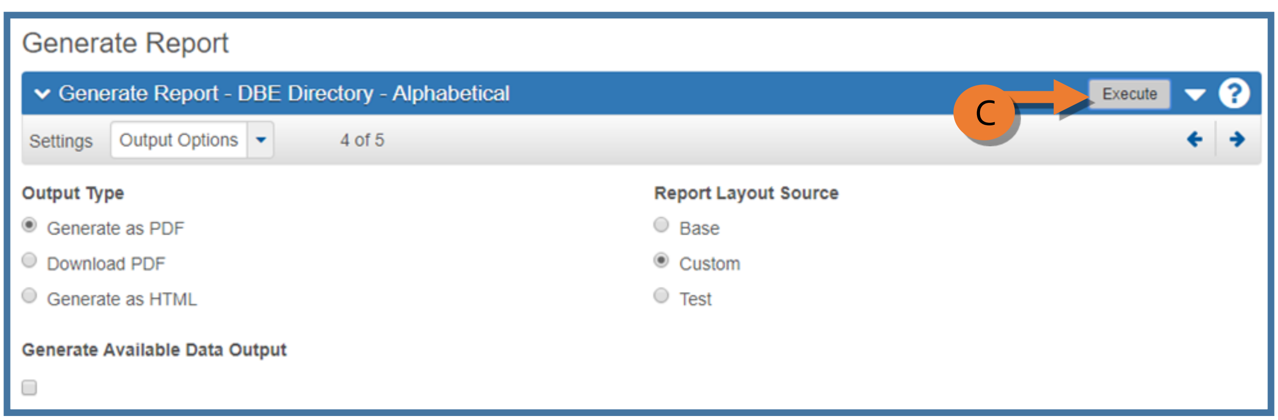

Figure 16.13