

Supplier

Functions:

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- Includes supplier acquisition

Business context

As part of the contract process, the DHW receives supplier information, as well as updates to supplier information. This information is shared with the Bio Depot. An active supplier is a prerequisite for each Panorama Product Delivery Request (PDR). Once a supplier is created in Panorama, the record cannot be deleted, but may be made “Inactive”.

Triggers

- Pre-Go Live activity: Current suppliers must be added to Panorama.
- A new supplier has been contracted.
- A change in supplier information has been received from the DHW.
 - Includes a supplier acquisition
- A supplier is no longer active and must be made “inactive”.

Standard Operating Procedures (SOPs)

- Ordering and Receiving Products from Suppliers or Public Services Procurement Canada (PSPC)

Business Roles

The Supplier process will be performed by the Bio Depot Biological Coordinator or the Admin support staff.

Panorama Role

All Supplier functions are restricted to users with the Inventory Provincial role.

Steps: Search

Overview Steps: Inventory Setup>Supplier>Add criteria> Search.

1. Click **Inventory Setup** from the Left Menu, then click the **Supplier** link.
2. The **Search/Add Supplier** screen displays. Enter the search criteria, then click the **Search** button. Suggested search criteria:
 - Supplier Code (short name of business or Vendor/Supplier Number)
 - Supplier Name (formal business name)

Hint: To search for all active suppliers – search with Status **Active** and no other criteria.

Supplier

Search / Add Supplier

Supplier Code: Supplier Name: Supplier Short Name:

Supplier Type: Status:

Search Retrieve Clear

Search Results

Row Actions: Update Supplier Plan Create New Supplier

Select	Name	Supplier Short Name	Supplier Number	Status	Supplier Type
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Search Results

Your search criteria returned (1) result(s).

Row Actions: Update Supplier Plan Create New Supplier

Select	Name	Supplier Short Name	Supplier Number	Status	Supplier Type
<input type="checkbox"/>	MerckCanadaInc	Merck	MerckCanadaInc	Active	Product

- ★ The Supplier Number is system-generated.

Steps: View Supplier

Overview Steps: Search for Supplier>Select Supplier> Click **Update Supplier**> View Supplier information> Click Cancel

1. From the search result screen, if the supplier is found, select the checkbox next to **Name**. To view/update detailed supplier information, click the **Update Supplier** button.
2. The **Maintain Supplier Information** screen displays. Review supplier information.

Supplier

Supplier Information was successfully saved.

Maintain Supplier Information

* Required field

Supplier Status:
Active

* **Supplier Code:** * **Effective-from Date:** **Effective-to Date:**

yyyy mm dd yyyy mm dd

* **Name:** **Short Name:** * **Type:**

EDI Capability Code: **Supplier Website:** **Emergency Contact:**

Previously Known As:

Comment: (4000 characters remaining)

Date	Comments	Recorded By
2017 Oct 10	The key contact asked that his colleague Tim Smith be contacted at 418-444-7777 for any issues between October 10 - 14, 2017.	Parsons, Cheryl

- To view a supplier's address, scroll to the bottom of the page, select the **Type** checkbox, and click the **Update Address** button. The **Address Id** is a system generated number.

Add/View Supplier Address(es)

Row Actions:

Label:

Select	Address Id	Type	Street	City	Province	Default Address
<input type="checkbox"/>	47	Legal Address	Mississauga Road	Mississauga	Ontario	✓
<input type="checkbox"/>	48	Pay-to/business office	Mississauga Road	Mississauga	Ontario	✓
<input type="checkbox"/>	49	Ship-from/return-to	Mississauga Road	Mississauga	Ontario	✓

Total: Page 1 of Jump to page:

- To view contact information, scroll to the bottom of the page and click the **Update Contact** button.

Add/View Supplier Contact(s)

Row Actions: **Update Contact** Delete Contact Add New Contact

Label: Print Label

Select	Address Id	Address Type	Title	Name	Phone Number	Default Contact
<input type="checkbox"/>	1945	Legal Address	-	Merck Vaccine	514-428-8600	✓
<input type="checkbox"/>	1946	Pay-to/business office	-	Merck Vaccine	514-428-8600	✓
<input type="checkbox"/>	1947	Ship-from/return-to	-	Merck Vaccine	514-428-8600	✓

Total: Page 1 of Jump to page:

Save **Cancel**

- When the review is complete, click the **Cancel** button in the bottom right hand corner of the screen.

Steps: Create Supplier

Overview Steps: Search > Click Create New Supplier > Add information > Save

- Complete a search to ensure the supplier is not already in the system.
- Click the **Create New Supplier** button in the Supplier Search Results section.

Supplier

Search / Add Supplier

Supplier Code:

Supplier Name:

Supplier Short Name:

Supplier Type:

Status:

Search Retrieve Clear

Search Results

Your search criteria returned 0 results, please modify your criteria and search again.

Row Actions: Update Supplier Plan **Create New Supplier**

- The **Maintain Supplier Information** screen displays.

Supplier ? [icon]

Supplier Information was successfully saved.

Maintain Supplier Information

* Required field

Supplier Status:
Active

* **Supplier Code:** A

* **Effective-from Date:** B
yyyy mm dd

Effective-to Date: C
yyyy mm dd

* **Name:** D
Short Name: E

* **Type:** F

EDI Capability Code: G

Supplier Website: H

Emergency Contact: I

Previously Known As: J

Comment: K (4000 characters remaining) Add

Date	Comments	Recorded By

4. Enter the Supplier information.

- Fields:
 - A. Supplier Code
 - Short Business name. When creating a PDR this number will be referenced and followed by the Supplier Name. If a Supplier/Vendor number is not assigned, add the short name.
 - B. Effective From date (auto-populates with today's date)
 - An earlier date may be added
 - C. Effective-to-date (if known)
 - D. Supplier Name – Formal Business Name on the contract. Long name – no spaces
 - E. Supplier Short Name: DO NOT USE
 - F. Type – Select Product
 - G. EDI Capability Code: DO NOT USE
 - H. Supplier website: DO NOT USE
 - I. Previously Known as: Historical Only - if the supplier name has changed or the supplier has been acquired add the original name in this field.
 - J. Emergency Contact: DO NOT USE
 - K. Comments – (up to 4000 characters)
 - Begin each comment with "Title_". Title examples – *Contract Amendment*. After adding a comment, click the **Add** button. Saving alone will not add the comment. Comments cannot be deleted.

5. Click the **Add New Address** button to add supplier addresses.



Add/View Supplier Address(es)

Row Actions:

Label:

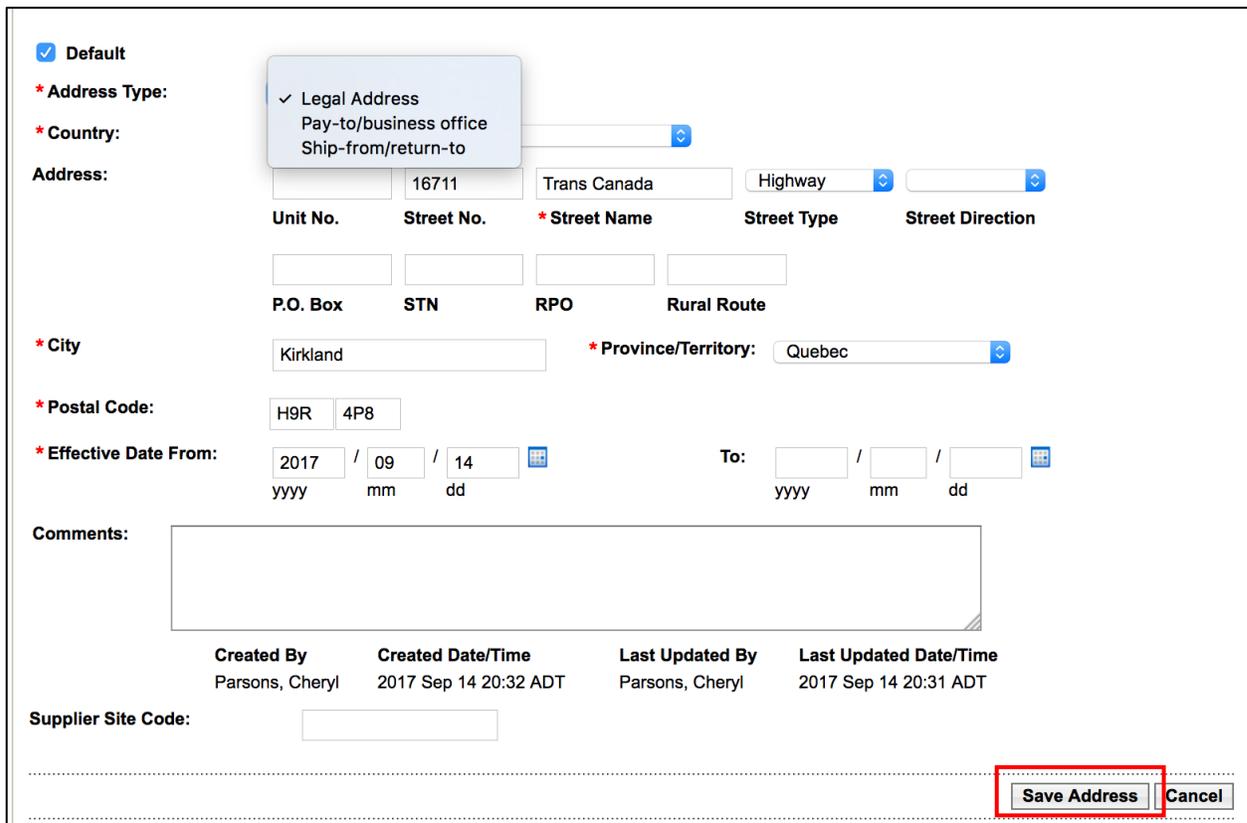
Select	Address Id	Type	Street	City	Province	Default Address

Total: Page 1 of Jump to page:

6. The system expands the address detail section.

- There are three types of addresses:
 - Legal Address
 - Pay to/Business Office
 - Ship From/Return To
- At least one address must be added for each type of address.
- At least one address must be assigned the default address for each type by checking the **Default** checkbox.
- The address may be the same for all three types.

7. Enter the information, then click the **Save Address** button.



Default

* **Address Type:** Legal Address Pay-to/business office Ship-from/return-to

* **Country:**

Address: 16711 Trans Canada Highway

Unit No. **Street No.** *** Street Name** **Street Type** **Street Direction**

P.O. Box **STN** **RPO** **Rural Route**

* **City** Kirkland *** Province/Territory:** Quebec

* **Postal Code:** H9R 4P8

* **Effective Date From:** 2017 / 09 / 14 **To:** / /

yyyymmdd

Comments:

Created By	Created Date/Time	Last Updated By	Last Updated Date/Time
Parsons, Cheryl	2017 Sep 14 20:32 ADT	Parsons, Cheryl	2017 Sep 14 20:31 ADT

Supplier Site Code:

address type.

9. Click the **Add New Contact** button. The screen will expand.

Add/View Supplier Contact(s)

Row Actions:

Label:

Select	Address Id	Address Type	Title	Name	Phone Number	Default Contact
Total: <input type="button" value="Previous"/> <input type="button" value="Next"/> Page 1 of <input type="button" value="Previous"/> <input type="button" value="Next"/>						

Jump to page:

Prefix:

Suffix:

Contact Address:

Province:

* Phone: International
(418) 444 6666 ext.

* First Name:

Contact Title:

City:

Country:

Mobile Phone: International
()

* Last Name:

Default Contact:

Postal Code:

E-mail:

Fax: International
()

Comments:

Created By Created Date/Time Last Updated By Last Updated Date/Time

10. Add the information, then click the **Save Contact** button. A contact is required for each address type. Repeat these steps to add contacts for each address. The contact name may be the same for all three types of addresses.

11. Click the **Save** button at the bottom of the screen to save the supplier. The system displays a success confirmation message.

Steps: Update Supplier

Overview Steps: Search > Select supplier > Click "Update Supplier" button > Update information > Click "Save" button

1. Complete a supplier search.
2. Select the checkbox next to the desired supplier name.
3. Click the **Update Supplier** button.

Your search criteria returned (1) result(s).

Row Actions:					
	Update Supplier	Plan			Create New Supplier
Select	Name	Supplier Short Name	Supplier Number	Status	Supplier Type
<input checked="" type="checkbox"/>	MerckCanadaInc	-	Merck	Active	Product

4. The **Maintain Supplier Information** screen displays. Make updates to the information
5. To add a comment, add the information in the Comments field. Supplier comments can contain up to 4000 characters.
 - After adding a comment, click the **Add** button. Saving alone will not add the comment.
 - **Comment History:** When comments are added, they become part of the history. Each comment includes the date it was entered, as well as the name of the user who entered it. Comments cannot be deleted.

	<p>Supplier Acquisition</p> <ul style="list-style-type: none"> • If the supplier’s name has changed, or the supplier has been acquired by a new company, add the original supplier’s name in the “Previously Known as” field. Describe the update in the Comments field. • Note: The corresponding contract will reflect the new name; the contract history will not.
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1. Click the **Save** button.