

VENDOR DATA USER GUIDE



DOCUMENT

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CHAPTER 1 – INTRODUCTION TO VENDOR DATA

For information on Vendor Data, see the links below.

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1.1 VENDOR DATA IN INEIGHT DOCUMENT

InEight Document’s Vendor Data module is used to manage the submission and review process for Vendor deliverables.

The Vendor Data Requirement list is known in the early stages of a project so can be defined either before purchase contracts are awarded or at the time of award. Using the “Required by” dates, the submission process can be tracked and expedited through InEight Document.

InEight Document’s Vendor Data module can also assist in managing the review process for Vendor documents as they are related to deliverable list requirements and in turn, contract packages.

A management and tracking process for the application of liquidated damages in the case of late Vendor document submissions is also available.

The Vendor Data module is structured as a hierarchy of entities:

- Contracts;
- Items Purchased within the Contract;
- Deliverable Line Items (Vendor data requirements) within the Item Purchased; and lastly
- Documents submitted against the Deliverable Line Items.

A Contract may have a single or multiple Items Purchased, against which there will be a number of Deliverable Line Items required.

The Vendor Data Module is activated by InEight Software on projects by request.

1.2 DEFINITIONS

The following table lists some of the key terminology relating to Vendor Data Management.

Term	Definition
Approved	The status of an item once satisfactory.
Blue Beam Studio Session (BBSS)	An online pdf review process integrated with InEight Document using Bluebeam RevU software.
Contracts	An agreement between two parties for the delivery of items purchased.
Deliverable Line Items	Vendor Data Deliverables for each item (one or many, typically many).
Deliverable Lists	Vendor documents for each deliverable (one or many, typically many)
Green Mark Revisions	Additional comments made against a document revision after it has been returned to the vendor.
Items Purchased	Items to be purchased for each contract (one or many, typically one).
Vendor Data Register	Module register. Contains register of Contracts, Items Purchased and Deliverable Line Items
Vendor Submitted	Status allocated to documents once returned to Vendor after a green mark review.

1.3 BUSINESS PROCESS



The business processes around managing Vendor Data in InEight Document are summarised below.

1.3.1 Create Contracts, Items Purchased and Deliverable Line Items

1. Create Items Purchased (prior to awarding contracts) with deliverable lists (optional).
2. Create Contracts with one or more items purchased and for each item purchased (if more than one) create the Deliverable Line Items (Vendor Data Requirement List or Schedule).
3. Export the list to Excel from within the Vendor Document Register and then attach the excel file to mail (currently a manual process) to send to the Vendor.

1.3.2 Vendor Uploads Documents

4. Vendor uploads their documents into InEight Document using their own Vendor Document Number. With Single upload or XL-Upload the documents being submitted can be linked to the relevant Deliverable List Item(s) as part of the upload process.
5. Once uploaded, the documents will be automatically recorded in the Vendor Data Module's Holding Area.

NOTE

The stamping and watermarking process can be done based on the project specific requirements including the addition of any margins to avoid obscuring any document details. This will be similar to the current QR/Superseded stamping process and will be done by INEIGHT and can be changed during the course of project.

1.3.3 Contractor Document Receipt and Quality Assurance

6. Once the Vendor has uploaded the documents, the uploaded documents will be stored in the Holding Area and require processing. Within the Holding Area, the documents can be linked to

the Deliverable Line Items and the metadata can be updated as necessary. The Holding Area is only accessible to nominated team members from the Main Contractor.

7. Once each Document's status has been updated to a restrained status, it will go into the review process.

1.3.4 Review Process

8. The review process is conducted as per the standard InEight Document or Bluebeam Studio Session (BBSS) review process. Any reviews will have the ability to be split into two or more reviews, if necessary.
9. Once the Vendor submitted documents have all completed the review process (all documents in the BBSS have been checked in), the Vendor Document Control team are notified so that the documents can be returned to the Vendor in a timely manner.
10. Deliverable Line Item status can be manually updated for individual items or several items in bulk.
 - If all linked documents for one or more Deliverable Line Items are approved, those line items will be highlighted to be marked manually as approved.
 - If any of the Deliverable Line Items contain one or more documents that are not approved, they will be left as is.
11. In the Vendor Data register, items will be highlighted to indicate if their review process is recently completed (or green mark revisions initiated).
12. Before the documents are transmitted back to the Vendor, additional post review stamp/watermarks may need to be applied to the documents that are sent. This process will be configured as per InEight Document's standard watermarking/stamping process with users able to review the stamped documents before sending them out.
13. At the end of the review process the documents are transmitted back to the Vendor directly from the Vendor Data Register.
14. Even after the documents have been returned to the Vendor, it is possible to review them further. These are known as Green Mark Reviews which are denoted by separate restrained status codes. Once allocated a Green Mark review status, a document goes through a review process similar to initial submission, except the document is sent directly to a Review Coordinator to nominate additional reviewers as required.

NOTE

Green mark status documents retain the original document's received date and InEight Document Revision until it is resubmitted by the Vendor. The document status then changes to 'Vendor Submitted' and it is updated to the next available InEight Document Revision.

15. Once the Green Mark review process is complete, if the document had any post review stamps applied, they will be removed and new stamps applied. Documents can then be returned to the Vendor once more.

1.3.5 Expediting

Based on contract requirements, some contracts are marked as expedited. InEight Document can assist in managing these contracts with reporting related to the number of days delayed and the associated damages. Deliverable Line Items are also colour coded in the register according to their status to assist with data visibility.

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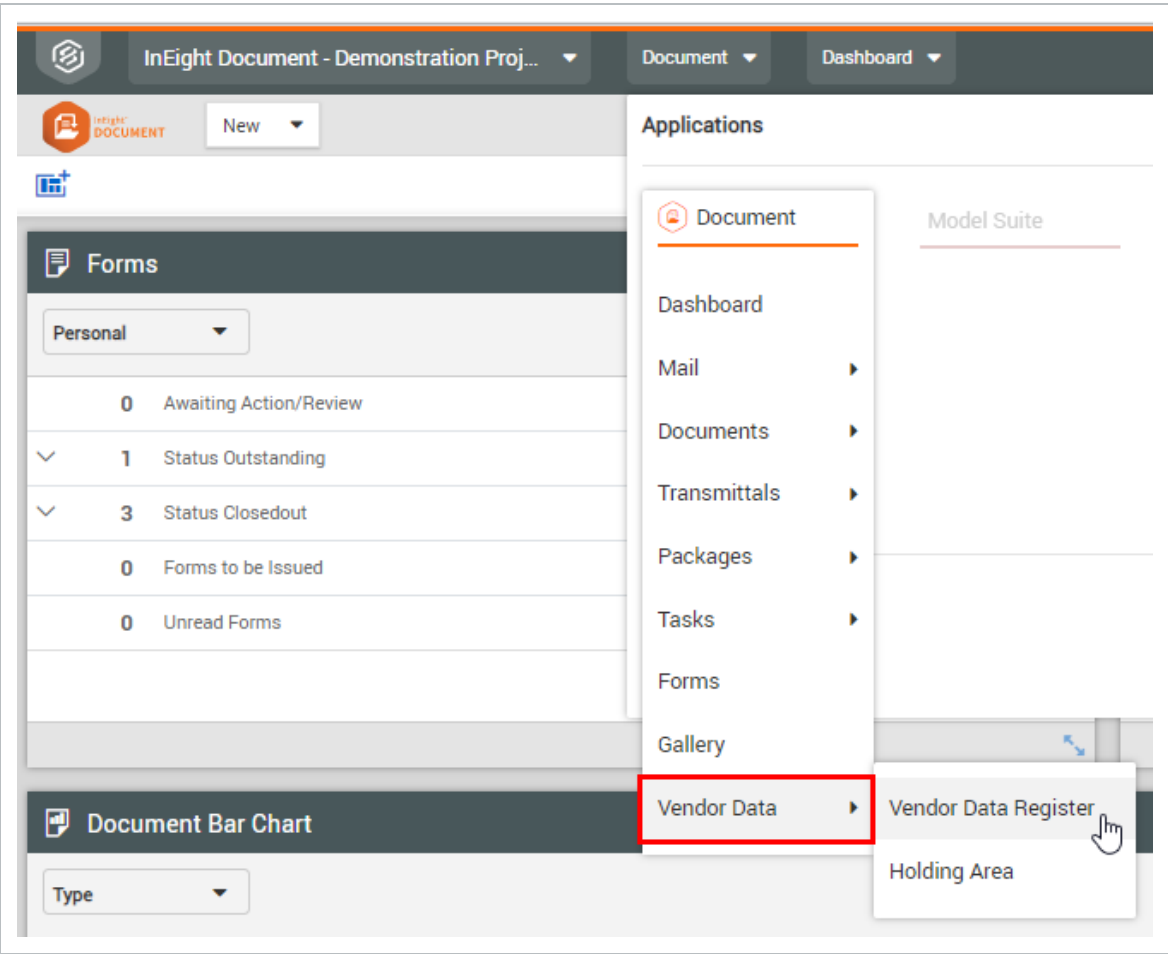
CHAPTER 2 – VENDOR DATA REGISTER

For information on using the Vendor Data Register, see the links below.

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2.1 USING THE VENDOR DATA REGISTER

1. Click on the **Vendor Data** Module to open the Vendor Data Register. The default view shows a hierarchical view of Contracts, Items Purchased and Deliverable Line Items.



- 2. Use the arrow buttons to the left of a contract to view the Items Purchased relating to the contract.
- 3. Use the arrow button next to an Item Purchased to view the Deliverable Line Item(s).
- 4. Use the arrow button next to a Deliverable Line Item to view the Documents associated with the item.

^	☐	420017264	Cooling Tower		Engineering Project Services
	☐	Item Id ↑	Description	Lead engineer	Alt. Lead engineer
☒	☐	420017264	Cooling Tower		
	☐	Deliverable line item number ↑	Description	Criticality	
☒	☐	BM-01	Bill of Material in Excel Per Sect...	Normal	
☐	☐	CA-01	Electrical Enclosure: HVAC and ...	Normal	
☐	☐	CA-02	MV Switchgear and MCCS: Seis...	Normal	
☐	☐	CA-03	IV Switchgear and MCCS: Seis	Normal	

NOTE

Deliverable Line Items have colour-coded icons in the register:

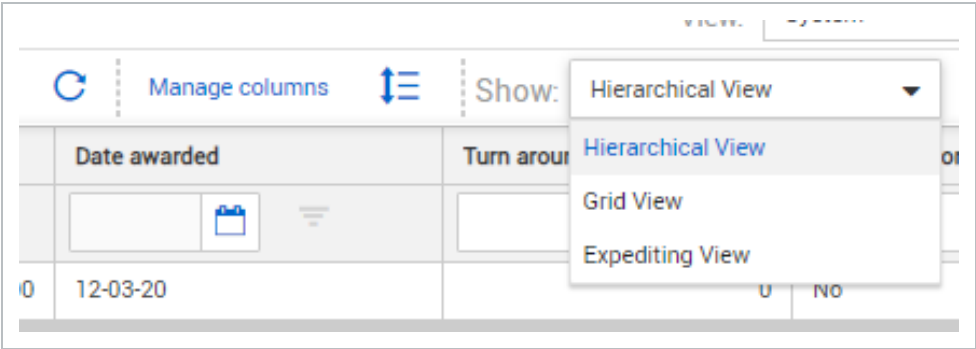
- The  indicates that there are documents that are overdue based on the Date Due and has nothing linked.
- The  indicates that all linked documents are considered Unrestrained or Released.
- The  indicates that the received documents are currently under review, or resubmittal is required.
- No Colour indicates that no documents have been linked to the Deliverable Line Item.

2.2 VENDOR DATA REGISTER VIEWS

The Vendor Data module comes standard with three register view options. **Hierarchical**, **Grid** and **Expediting** View.

- **Hierarchical View** – This is the primary register view for Vendor Data. This view provides a clear tiered breakdown of the Contract, Item Purchased, Deliverable Line Items and Documents.

- **Grid View** – The Grid View allows users to isolate the Item Purchased or Deliverable Line item within a Contract. This view allows for more advanced filtering as required.
- **Expediting View** – This view provides a summary of the status of Deliverable Line Items associated to the Contract. This view will allow you to determine how many Deliverables are Outstanding, Due in the next 30 days, Overdue etc, by Contract No.



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CHAPTER 3 – CREATING CONTRACTS, ITEMS PURCHASED AND DELIVERABLE LINE ITEMS

For information on Creating Contracts, Items Purchased and Deliverable Line Items see the links below.

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3.1 CREATING CONTRACTS

To create a new Contract:

1. Open the **Vendor Data** Module. Click **New** then select **Contract**.
2. Enter all required information. Mandatory information for a new Contract (default settings) includes:
 - Contract Number
 - Description
 - Vendor Company
 - Expediting Contract (Yes / No)

- Status (selected from values defined in the Vendor Contract Status Configuration Table)

Contract: 420017264

DETAILS

Cancel Save

Contract Number: 420017264

* Description: Cooling Tower

PO number: * Status: Open - OPEN * Expediting contract: No

* Vendor company: Engineering Project Services Vendor contacts: Select contacts

Contract manager company: Select a company Contract manager: Select a contact

Original value: 0.00 Current value: 0.00 Date awarded: 12-01-20

Review turn around time: 0 (business days) Resubmittal turn around time: 0 (business days)

Add external links

External links added:

Comments:

Liquidated damages

Cap percentage: 0.00 % Cap amount: 0.00 Settlement amount: 0.00 Date settled: mm-dd-yy

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NOTE

Some fields that have specific functionality associated with them are:

- **Review Turn Around Time:** Used to calculate the scheduled return date to the vendor for documents submitted.
- **Resubmittal Turn Around Time:** Used to calculate the scheduled return date to the vendor for documents re-submitted.
- **Liquidated Damages Cap:** This is defined either in terms of percentage or amount and is only enabled for Expediting Contracts.

3. Click **Save**, then **Close** once complete.

3.2 CREATING ITEM PURCHASED

To create a new Item Purchased:

1. Open the **Vendor Data** Module and click **New** then select **Item Purchased**.
2. Enter all required information. Mandatory information for a new Item Purchased (default settings) includes:
 - Item ID
 - Description

- Status (selected from values defined in the Purchased Items Status Configuration Table)

Purchased Item: 420017264

DETAILS

Cancel

Save

Item ID:

420017264

* Description:

Cooling Tower

* Status:

Open - OPEN

Planned contract date:

mm-dd-yy

Contract number:

420017264

Actual contract date:

12-01-20

Physical delivery date:

mm-dd-yy

Test date:

mm-dd-yy

Lead engineer company:

Select a lead engineer company

Lead engineer:

Select a lead engineer

Alternative lead engineer company:

Select an alternative lead engineer company

Alternative lead engineer:

Select an alternative lead engineer

Expediter company:

Select an expediter company

Expediter:

Select an expediter

Vendor expediting company:

Select a vendor expediting company

Vendor expediting contact:

Select a vendor expediting contact

Tag list:

Add external links

External links added:

Comments:

Liquidated damages schedule

Start day	End day	Amount	Comments
-----------	---------	--------	----------

3. Click **Save**, then **Close** once complete.

NOTE

- At the bottom of the Item Purchased details window, it is possible to define a schedule for liquidated damages that apply to the late delivery of Deliverable Line Items.
- Items Purchased can be created prior to the creation of Contracts in which case they are listed in the Vendor Data Register against Contract Number = "N/A". They can be linked to Contracts later when the Contracts are placed. In this case use the **Planned Contract Date** in the Item Purchased Details window to define when the contract for the item is expected to be awarded.
- Tag List: The list of Tags entered into this field is dynamically linked to any documents associated with Deliverable Line Items related to the Item Purchased. As documents are linked to the Deliverable Line Items the Tag list field in the Document Details is updated automatically with the value of the Tag List field at Item Purchased level. In the same way if the Tag List at Item Purchased level is updated, linked documents will also be updated subject to the user being prompted to accept this change.

3.3 CREATING DELIVERABLE LINE ITEMS

To create a new Deliverable Line Item:

1. Open the **Vendor Data** Module and click **New** then select **Deliverable Line Item**.
2. Enter all required information. Mandatory information for a new Deliverable Line Item (default settings) includes:
 - Item ID
 - Deliverable Line Item Number
 - Description
 - Deliverable Type (selected from values defined in the Deliverable Type Configuration Table)
 - Criticality (High, Normal, Low).

NOTE

Typically, the first value selected when creating a new Deliverable Line Item would be the Contract Number although this is not made mandatory so that Items Purchased and Deliverable Line Items can be predefined early on in the project before Contracts are placed.

3.3.1 Other important information captured about Deliverable Line Items includes:

- **Status:** Selected from values defined in the Deliverable Status Configuration Table.
- **Date Due:** This is the date that documents must be submitted by relating to this Deliverable Line Item. The Date Due can be defined in absolute terms (a fixed date) or in relative terms (number of days before or after) to other key dates such as Contract Award; Testing Date; Delivery Date; or other Date values or even dates relating to other deliverables. For example, you can define the due date as 5 days from the submission of deliverable X.

3.3.2 The following fields get updated automatically by InEight Document:

- **First Received Date:** First date a document is received against the Deliverable Item.
- **Last Received Date:** Last date a document is received against the Deliverable Item.
- **Completed Date:** Date the Deliverable Line Item status is changed to COMPLETE.

- **Not Applicable Date:** Date the Deliverable Line Item status is changed to NOT APPLICABLE.

Deliverable line item: BM-01

DETAILS LINKS

Contract Number: 420017264 * Item ID: 420017264 Deliverable line item number: BM-01 * Deliverable type: BILL OF MATERIAL - BM

* Description: Bill of Material in Excel Per Section GR-B

* Criticality: Normal Status: Select a status

Date due: ☒ None ☐ Absolute ☐ Relative

ETA date: mm-dd-yy

First received date: mm-dd-yy Last received date: mm-dd-yy Completed date: mm-dd-yy

Not applicable date: mm-dd-yy Physical delivery date: mm-dd-yy Test date: mm-dd-yy Change order:

Discipline engineer company: Select a discipline engineer company Discipline engineer: Select a discipline engineer

Alternative discipline engineer company: Select an alternative discipline engineer company Alternative discipline engineer: Select an alternative discipline engineer

Add external links

External links added:

Comments:

Liquidated damages

Liquidated damages apply: No Resubmittal stipulated: No Line item cap: 0.00

Line item settlement: 0.00 Line item date settled: mm-dd-yy

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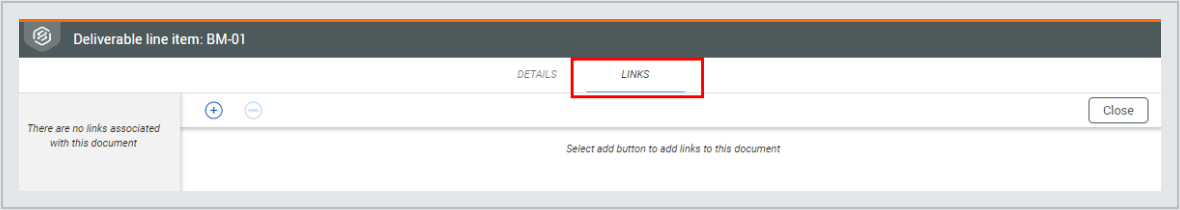
Regarding Liquidated Damages (expediting contracts only) enter:

- Liquidated Damages Apply (Yes/No)
- Resubmittal Stipulated (Yes/No) – Yes to indicate Liquidated Damages will also apply to late resubmittals
- Line Item Cap value.

3. Click **Save** once complete, then click the **Close** button.

NOTE

Go to the **Link** tab then **Link Items** to associate the Deliverable Line Item to one or more documents. You can also link items from the holding area.



See [Submitting Vendor Documents](#) for more information.

CHAPTER 4 – SUBMITTING VENDOR DOCUMENTS

Vendor Documents are submitted in the same way all other documents are uploaded in InEight Document.

For more information about uploading documents to Document, see [Uploading a Single Document](#) and [Uploading Documents in Bulk](#).

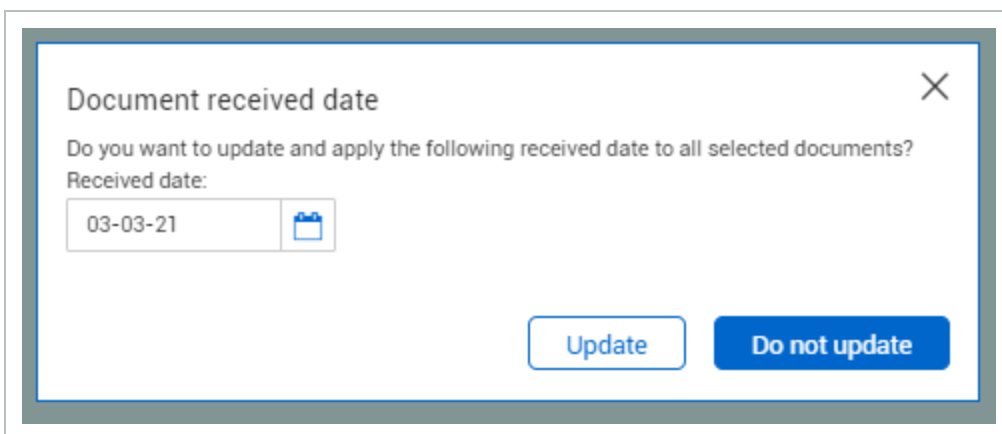
The options are:

- Single Document upload
- Bulk Upload (standard and enhanced)
- XL-Upload

If Vendor documents are uploaded using Single Document Upload (or accessed after upload is complete from the Document Register), they can be linked to one or more Deliverable Line Items.

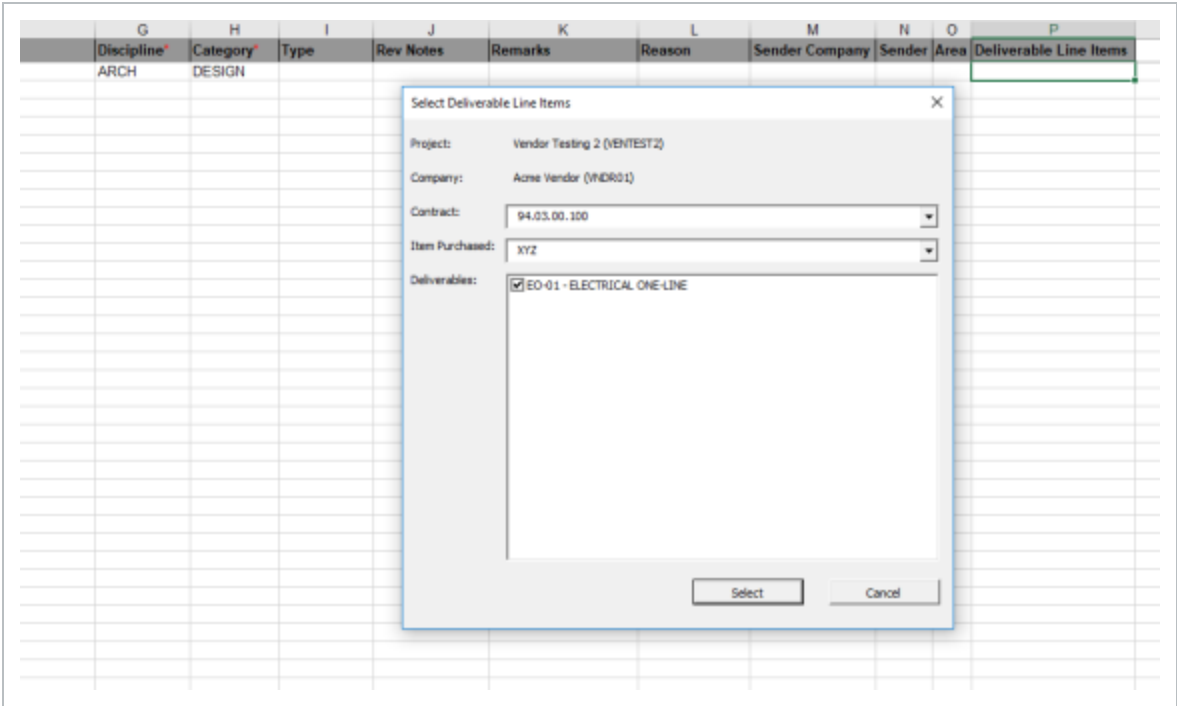
LINK A DOCUMENT TO A DELIVERABLE LINE ITEM

1. From the document details window, go to the Links tab, then press the **Add icon**.
2. In the Select the Work Items window, click the **Add** button and select **Deliverables**.

A screenshot of a dialog box titled "Document received date" with a close button (X) in the top right corner. The dialog asks, "Do you want to update and apply the following received date to all selected documents?". Below this, it says "Received date:" followed by a text input field containing "03-03-21" and a calendar icon. At the bottom right, there are two buttons: "Update" (outlined) and "Do not update" (solid blue).

3. At the Link Deliverable Line Item window select the Contract Number and Item ID and then select one or more Deliverable Line Items to link to the document.

If using XL-Upload (with the Vendor Data module enabled), when the Deliverable Line Items cell is selected, it brings up a selection window as shown below. The Deliverable Line Items that each document relates to can be defined within the XL-Upload work sheet by entering them as a comma separated list into the Deliverable Line Items column. They will be validated in the normal way. Note that this column will not show if the project does not have the Vendor Data module enabled or the user does not have access to this module.



NOTE

- The Upload Rule for the Vendor can be set up, so that all documents uploaded by the Vendor are automatically sent to the Holding Area. See Item 8.4 for more information.
- If the Contract, Item Purchased or Deliverable have only one item in the dropdown, it will be automatically selected.

CHAPTER 5 – MANAGING THE HOLDING AREA

For information on Managing The Holding Area, see the links below.

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5.1 PROCESSING VENDOR DOCUMENTS

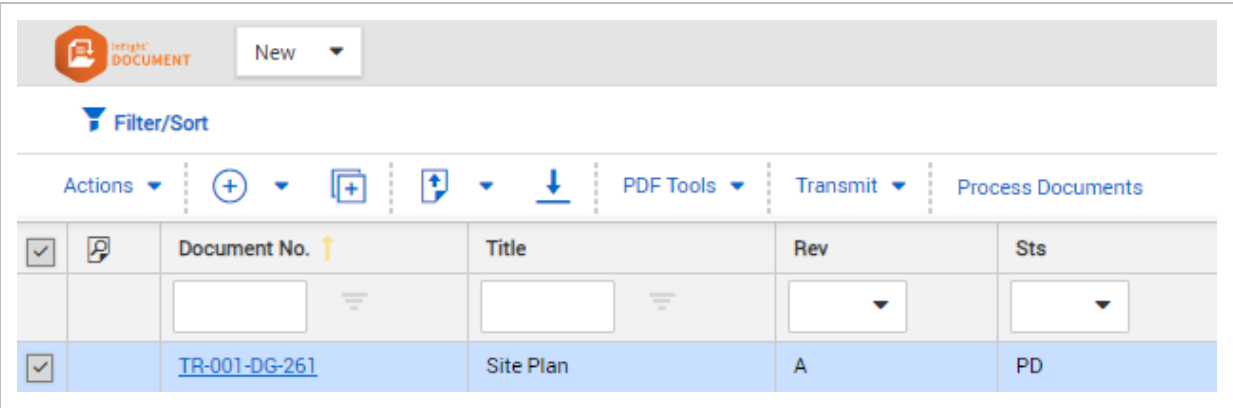
The Holding Area is separate to the standard Documents register in InEight Document, requiring documents to undergo a Quality Check prior to being added to the Document Register.

PROCESS VENDOR DOCUMENTS

Summary: Documents uploaded to InEight Document by a vendor are automatically sent to the Holding Area. You must process the documents to ensure quality before they can become available in the Documents register. Processing includes updating metadata and linking vendor documents to deliverable items.

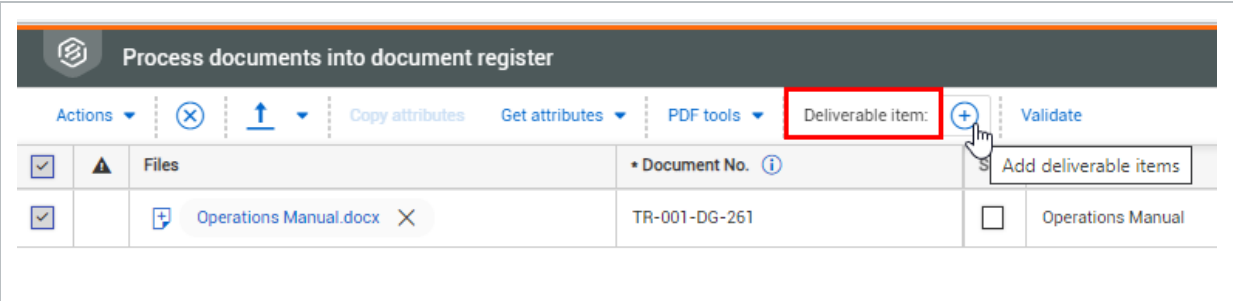
1. Select the documents that you want to process.

2. Click **Process Documents**.

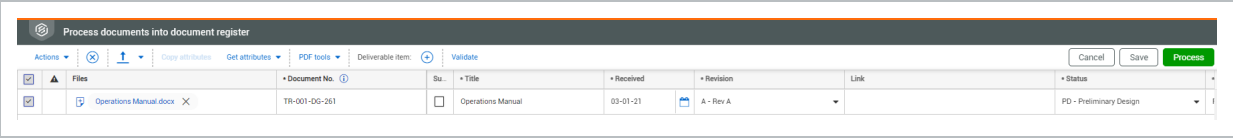


The Process documents into document register page opens.

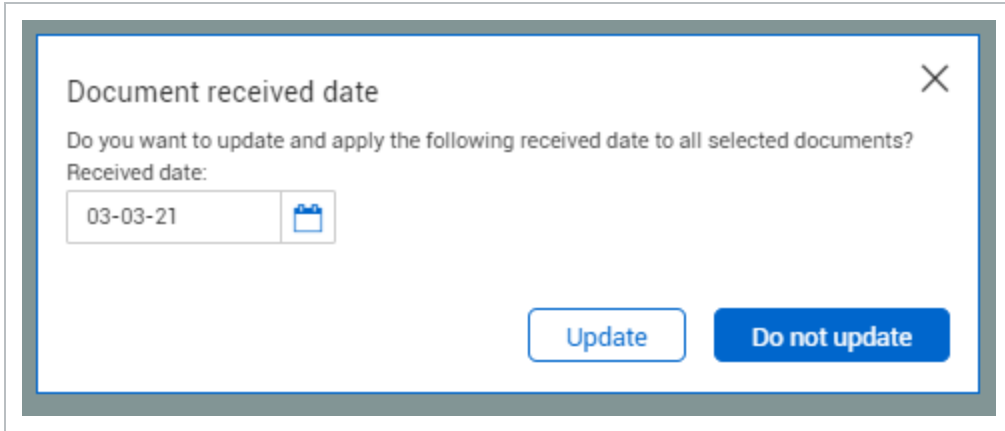
- 3. Update the metadata for the documents as required. If needed, you can drag and drop the columns, so they are arranged to facilitate updating the metadata.
- 4. For any documents that have not been linked to a deliverable line item click Add **Deliverable Items**, and then select the deliverable line item each document should relate to.



- 5. Click **Validate** to ensure there are no errors.
- 6. Click **Process** to finalize the processing of the documents and add them to the Documents register.



- 7. When processing documents, the Received Date for the document can be updated. This will be updated against the documents in bulk and reflected within the Vendor Data Register.



Document received date

Do you want to update and apply the following received date to all selected documents?

Received date:

03-03-21

Update Do not update

What's next: The documents are now available in the Documents register. The document history from the Holding area is included with the document's history in the Documents register.

NOTE

- Documents within the Holding Area can only be transmitted once.
- It is possible to verify that the PDF file is Encrypted or not in the Holding Area by checking the **Encrypted PDF** column in the register, or in the PDF Document Properties.

5.1.1 Link deliverable line items from the Holding Area

You can link deliverable items from the document on the Links tab.

5.1.2 Reject documents from Holding Area

You can reject a document from the holding area when you do not want it to be transmitted to its destination without further consideration.

1. From the Holding Area register, select one or more documents to reject.
2. Go to the Actions menu, and then select **Reject documents**. The Reject Document dialog box opens.
3. Select a reason from the **Reason** drop-down list for one of the selected documents.

Reject Document

×

The following documents were selected to be rejected. To continue, enter a reason as to why the documents are being rejected.

☐ Apply first reason to all remaining rejected documents

Document No	Rev	Sts	* Reason	* Reason text
PKG-██████████	SD1	MISC	Other - OTHER ▾	
NSK-██████████	A	IFC	Other - OTHER ▾	
AUT01	SD	8MILE	Other - OTHER ▾	

☒ Notify the users with access to the above documents about the rejection.

Cancel

Save

- If you selected Other - OTHER as the reason, you must enter reason text in the **Reason text** field. If you selected a different reason, the field is automatically filled.
- If you have multiple documents and you want to use the same reason and reason text for all of them, select the Apply first reason to all remaining rejected documents check box. If you want to use different reasons or reason text, repeat steps 3 and 4 for the remaining documents.
- If you do not want to notify users with access to the documents about the rejection, deselect the **Notify the users with access to the above documents about the rejection** check box.
- Click **Save**.

5.1.3 Delete documents from Holding Area

You can delete documents that have not been transmitted from the holding area.

- From the Holding Area register, select one or more documents to delete.
- Go to the Actions menu, select **Admin**, and then click **Delete**. The Holding area dialog box opens.

Holding Area

The following documents were selected for deletion. Enter a reason as to why they are to be deleted.

☐ Apply reason to all documents.

Document No.	Rev	Sts	* Reason for deletion
AUTO2	SD		
NSK-	A	IFC	
PKG-	SD1	MISC	

Cancel

Delete

3. Enter a reason for deletion for each document. If all documents have the same reason, you can enter the reason for one document and then select the **Apply reason to all documents** check box.
4. Click **Delete**.

To enable the Holding Area, please contact [InEight Support](#).

5.1.4 View holding area history

You can view the vendor document history from the History tab of a holding area record. The history shows the audit trail for the vendor document.

To access the history tab, click a document number in the Holding area register to open the document details, and then click on the **History** tab.

Document No: 20201001-006 Rev: 01 Sts:

DETAILLINKSFILE VIEWERHISTORY

CloseSearch all History

Date	Event Type	Action By	Description	Notification Details	Rev	Sts
2022-08-22 01:55 PM	Changed Hold Document Details	Greg Harrison (Houston Contrac...	View more		01	
2022-08-22 01:52 PM	Changed Hold Document Details	Greg Harrison (Houston Contrac...	View more		01	
2022-08-22 01:37 PM	Changed Hold Document Details	Greg Harrison (Houston Contrac...	View more		01	

5.2 PDF TOOLS

Documents within the Holding Area can be modified prior to being processed. Within the PDF Tools menu, there are two options.

- Rotate PDF Clockwise or Counter Clockwise
- Convert Image Files to PDF
- View PDF Properties

CHAPTER 6 – VENDOR DOCUMENT REVIEW

For information on Vendor Document Review, see the links below.

6.1 Reviewing Vendor Documents

6.2 Returning Vendor Documents to Vendor

6.3 Green Mark Revisions - Client Specific Requirement

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6.1 REVIEWING VENDOR DOCUMENTS

Vendor Documents that have been uploaded with a restrained status are reviewed using the standard workflow process in InEight Document. If using the Bluebeam Studio Session review process, then a single review can be split into two or more reviews if necessary.

More information on the Review and Approval Workflow process in InEight Document can be found in the **Document Review and Approval** training manual.

NOTE

- Reviewed documents can be auto stamped via InEight Document’s standard watermarking/stamping process.
- Following the release of documents from the workflow process, the Deliverable Line Item status should be manually updated.
- If all documents related to a Deliverable Line Item are approved, the item is highlighted in green. If one or more documents are rejected the item is highlighted in red until all items are approved.
- Documents can be superseded while they are under review, from the Holding Area. A Default Review Status will be applied. This is defined on a project basis within the Project Settings.

6.2 RETURNING VENDOR DOCUMENTS TO VENDOR

Once the review process is completed, the Review Status has been applied, and the documents released, the documents should be returned to the vendor using the Transmit drop down available above the Vendor Data Register.

The selection of documents to be returned can be done in any of the following ways:

- From a Vendor Deliverable Line Item in the Register which selects all the associated documents.
- By searching the Documents Register by Contract No/Items Purchased or Vendor.
- Based on the Bluebeam Studio Session (BBSS), if BBSS reviews are enabled.

When returning the documents, if one or more document internal reviews have not been completed, users will be shown a warning message and will have the ability to:

- Exclude the documents and send the rest.
- Cancel the process and return to it once all document reviews are completed.

NOTE

The format of the Transmittal used to return Vendor documents includes the Review status, and Resubmittal Due Date (if required for the document).

6.3 GREEN MARK REVISIONS - CLIENT SPECIFIC REQUIREMENT

Some of InEight's clients' processes include a requirement for making Green Mark Revisions of documents. After the vendor documents are returned to the vendor, further comments, known as Green Mark Revisions, may be added to the same revision of the documents via additional workflows.

To make Green Mark Revisions:

1. Change the status of documents (already reviewed and returned to the vendor) from the document details window, to a restrained **Green Mark Status** (For example IFR-g1).
2. This will initiate a new workflow in the standard way and once completed, the results can again be transmitted back to the vendor as Green Mark comments.

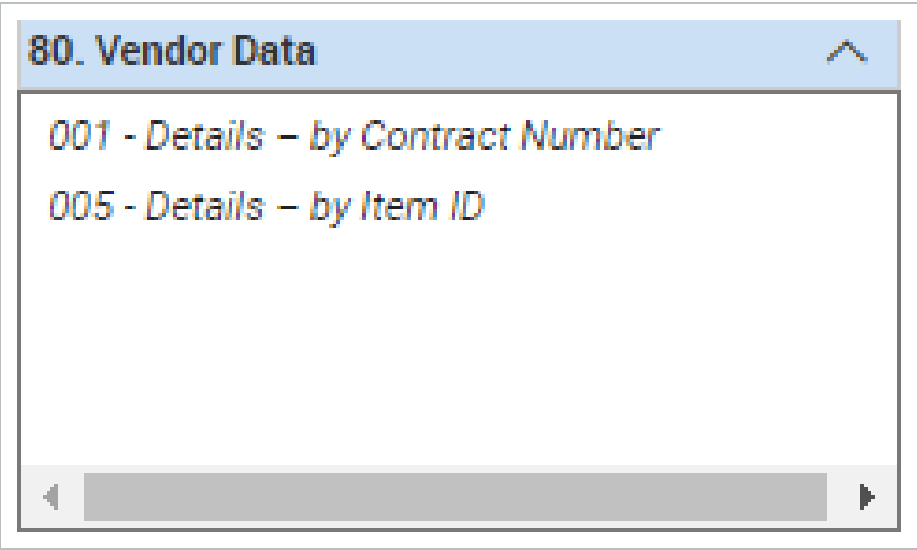
NOTE

On completion of a Green Mark review, if the document had any post review stamps applied previously, they will be removed and new stamps will be applied.

CHAPTER 7 – REPORTS

Two basic standard vendor data related reports have been included in Phase 1:

- Report 001 prints a register of Contracts, one row per Contract.
- Report 005 prints a register of Contracts listing the Items Purchased for each Contract.



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CHAPTER 8 – ADMINISTRATION

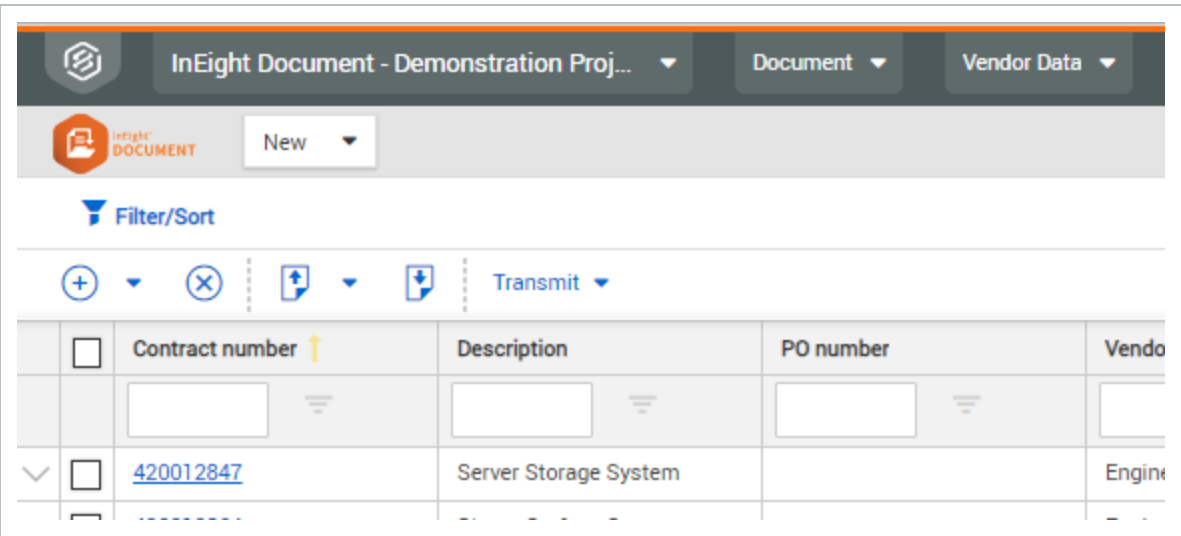
For information on Administration, see the links below.

8.1 IMPORTING ITEMS

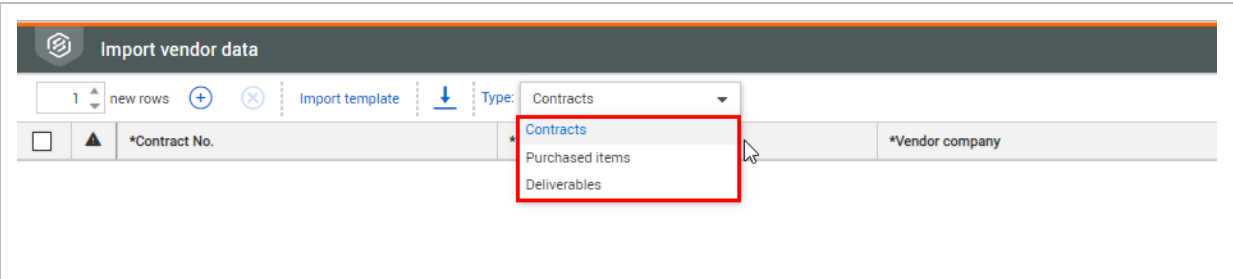
It is possible to import Contracts, Items, and Deliverable list items into the Vendor Data Module using Excel based templates.

To import items:

- 1. From within the **Vendor Data** Module, select **Import**.

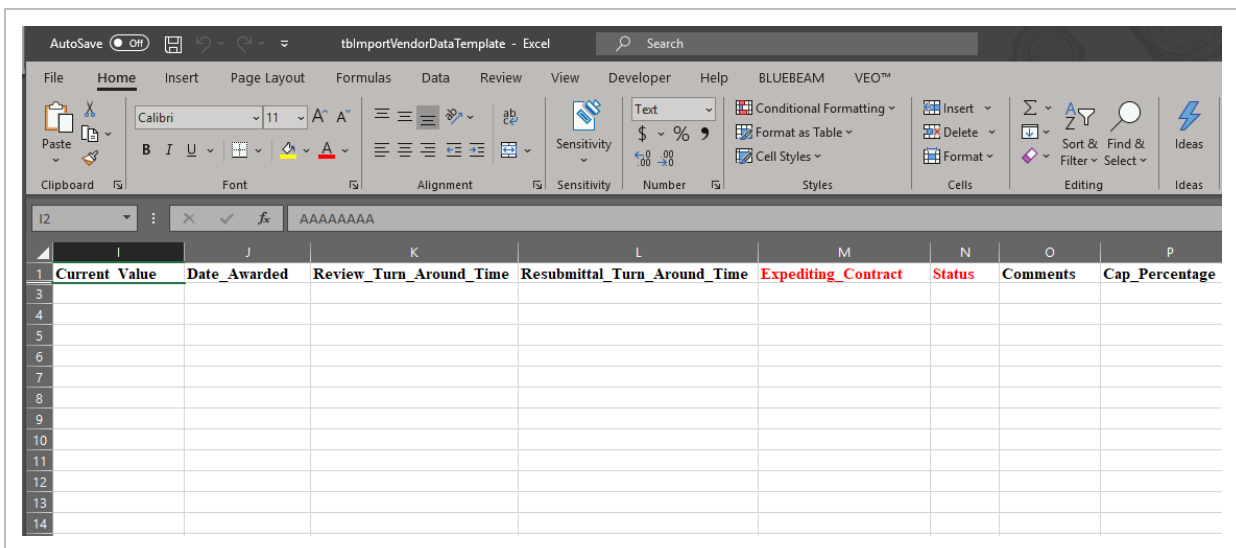
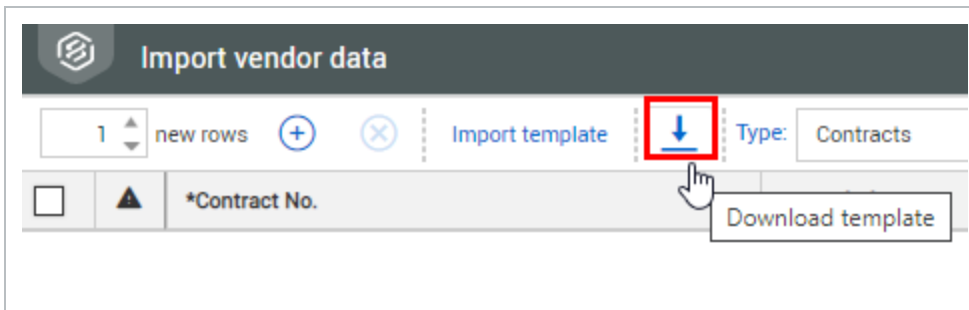


- 2. This opens up the Import Vendor Data window.



- 3. Use the drop-down option on the right to select **Contracts**, **Purchased Items** or **Deliverables** as required.

4. Populate the data fields manually or select the **Download Template** button to download the excel-based template for each Vendor Data Element and populate as required.

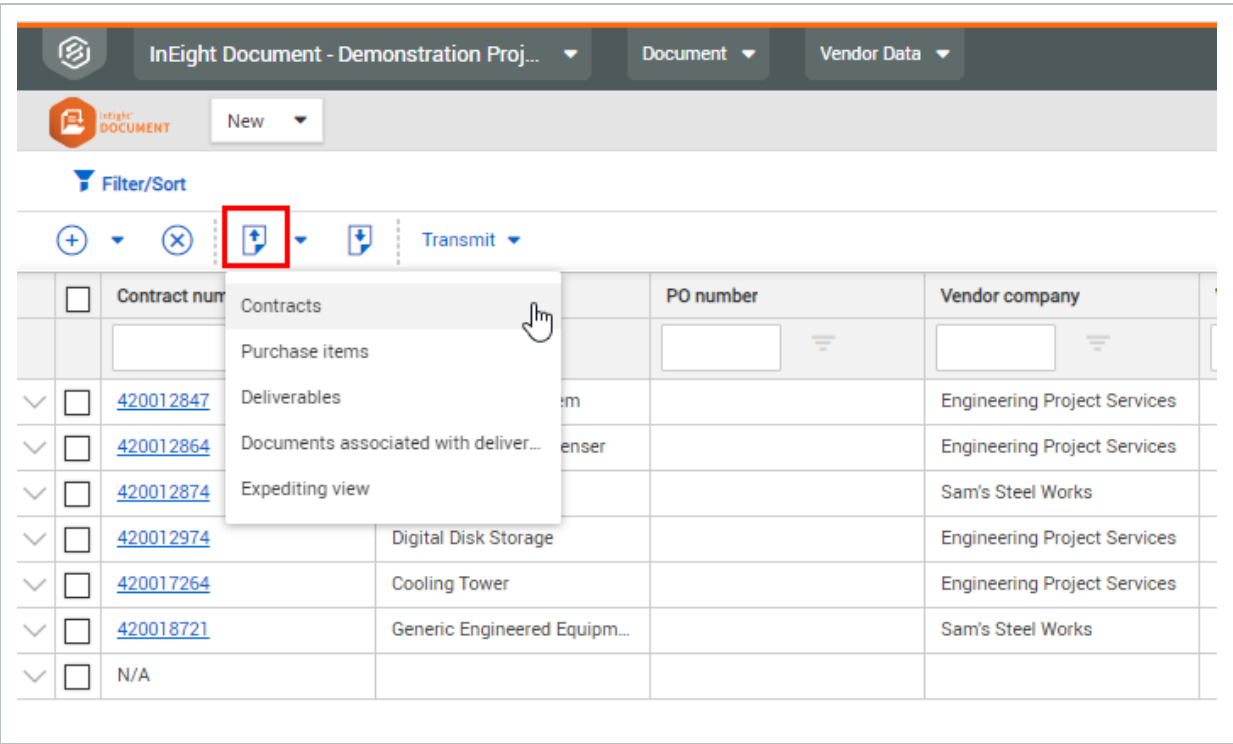


5. Once the template has been populated, save it then select the **Import Template** button to import the updated template back into InEight Document.
6. Once complete, click **Validate**, then **Save**.

8.2 EXPORTING ITEMS

To export items to Excel from the Vendor Data Module:

1. Select the Export icon and menu option.
2. Choose the item you wish to export to Excel and save to your desktop.



8.3 SECURITY

Access to the Vendor Data Module is managed in the same way as access to other modules via Manage User Access from within the Admin module. Options for each user are:

- **Full:** Users can create Contracts, Items Purchased, Deliverable Line Items, and links between Deliverable Line Items and Documents. They can also manage the status of Deliverable Line Items.
- **View:** Users can view all Vendor Data Information created by users within their company but cannot create or edit data.
- **No Access:** Users cannot view the Vendor Data Register.

8.4 MANAGING THE UPLOAD RULE

When creating the upload rule for Vendors, it is possible to enforce that all documents uploaded, are to automatically go to the Holding Area instead of the Document Register.

Upload - Holding Area Rule

DETAILSALLOCATIONSHOLDING AREA FIELDS

CancelDuplicateSave

*Title:

Holding Area Rule

☒ Upload document to Holding Area

Field selection:

☐ Show Selected Only

Status

Select All

Search sts

☐ Any

☒ Preliminary Design

☐ As Built

☐ Detailed Design

☐ Issued for Construction

☐ Issued for Information

☒ Issued for Review

Discipline

Select All

Search discipline

☒ Any

☐ Architectural

☐ Civil

☐ Drilling

☐ Electrical

☐ Fire Systems

☐ Instrumentation

☐ Landscape

☐ Lifts & Escalators

☐ Mechanical

Category

Select All

Search category

☒ Any

☐ Cable Schedules

☐ General Arrangements

☐ Isometrics

☐ Piping and Instrument Dra...

☐ Plans & Elevations

☐ Plot Plans

☐ Route & Profile drawings

Type

Select All

Search type

☒ Any

☐ Agreements

☐ Bank Guarantees

☐ Certificate

☐ Contract

☐ Drawing

☐ Drawing

☐ Drawing-Shop

☐ Drawing-Sketch

☐ Image

In the **Vendor Fields** tab, an administrator can select which fields should be available for the Vendor when they are uploading documents.