

# VendorManager™

Version 1.04

## User's Guide

Version 1.0





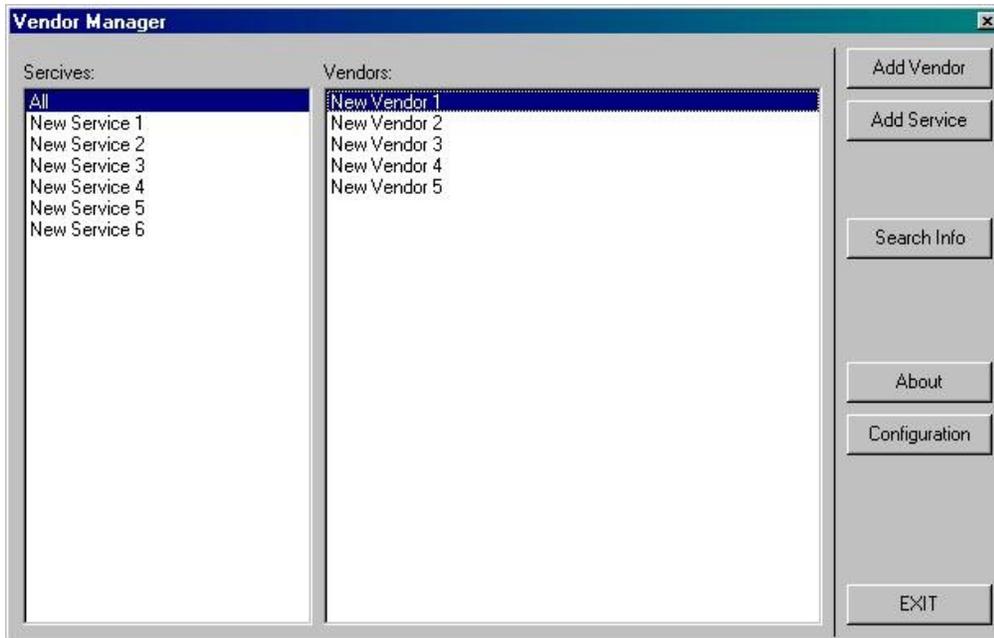
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## Chapter 1: The Main Window

### Overview

The main window in Vendor Manager 1.0 (VM) is utilized for day-to-day operations. It is intended to provide a dictionary of vendors that provide certain services. Finding a vendor for a particular service is as easy as selecting a service in the "Services" list on the left of the window.



VM will instantly update the "Vendors" list on the right with the vendors that have been pre-selected to provide the desired service. The Vendors are sorted by ranking as configured for the selected service. This allows a user to instantly see which vendor is the primary choice and which to call if the first choice vendor is not able to deliver.

The "Add Vendor" and "Add Service" buttons are used to create new entries for each of these categories and configure them.

The "Exit" button terminates the VM program.

## Viewing and Selecting Information

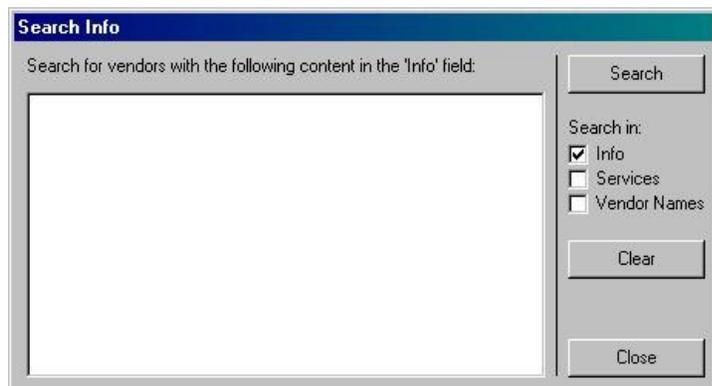
To display the list of vendors for a different service, left-click (single click) the desired entry in the "Services" list. The default choice "All" is always present and shows all existing Vendors in Alphabetical order.

To open specific Vendors' detail information or modify it, single-click on the Vendor's entry in the "Vendors" list.

## Searching for Vendors

You can search for vendors with specific information stored in their respective "Info" field. The intent is to add more granularity to the selection capabilities. The services are utilized to identify groupings of services like "Computer Hard- and Software" or "Building Maintenance". However you may find it more fitting to search for specific offerings or products such as "Network cables" or "Air Conditioning Repair".

The "Search" window appears upon clicking the "Search button on the main window.



The three check boxes under the "Search" Button allow the user to search for vendors not just in their "Info" field but also include all vendors who's name contains the phrases in the text field or even those who are associated with services containing the words or phrases. However, searching for all of the results at the same time may produce results that are not transparent to the user. So use caution when searching in more than one field.

In the blank text field type your search criteria. You have several options for searching:

- Search for a single word by typing it into the text field
- Search for a collection of options by typing them into the field but separating them over multiple lines by ending each word with the <Enter> key
- Search for a phrase by typing the exact phrase like "A/C Service and Repair"
- Search for any combination of the above

Your words may be complete or partial so you can increase the result range by leaving out nuances like finding "Electronics" and "Electrical Circuits" by searching for "Electr". Further you may substitute individual characters with wild cards. These can be a "\_" character to replace a single letter or a "%" character to replace an undefined number of characters.

**Examples:**

“Vend% Service” returns

“Vending Machine Service” as well as “Vending Service” or “Vendor Service”

“Pump #\_ Service” returns

“Pump #1 Service” but not “Pump #12 Service”

To specify a literal “\_” or “%” character you must precede it with a “\” character.

To specify a literal “\” character you must type “\\”.

To search for the literal “Fix\_Discount: 10% off Repairs”  
you must type “Fix\\_Discount: 10\% off Repairs”.

You initiate the search by clicking the search window's “Search” button. The results are shown in the main window's vendor list.

**Important:**

When searching for words or phrases the results are compiled across all defined services allowing you to find vendors offering the same or similar products even though they might have been assigned different services.

User The “Close” button to close the search window.

The “Clear” button erases the content from the text field in the search window but does not change the current search results in the main window.

## Chapter 2: Getting Started with Vendor Manager

### **Setup Overview**

Vendor Manager works as a representation of a matrix of information in multiple dimensions. The basic data elements, Services and Vendors, are entered independently and then organized in context by establishing mapping and rankings between them.

VM must first be fed the information to display. This is done by using the "Service Maintenance" and "Vendor Maintenance" windows and following these steps:

1. Add the Services you want to appear in the "Services" list in the main Window (refer to "Adding and Maintaining Services").
2. Add the Vendors you want to appear in the "Vendors" list in the main window (refer to "Adding and Maintaining Vendors").
3. Assign the services each vendor provides in the "Vendor Maintenance" window (see 'Establishing Vendor/Service Relationships').
4. Set the preference order in which vendors appear in the Vendor list for each service in the "Service Manager" window (see "Changing Vendor Ranking")

### **Limitations**

There are several limitations that are essential to VM's basic functionality:

- a. All Service Names must be < 50 characters in length and must be unique.
- b. All Vendor Names must be < 80 characters in length and must be unique.
- c. Avoid the use of special characters, !?^[\{\};:]"^, where possible to avoid sorting and data retrieval problems.
- d. Make sure you understand the current assignments for a service before reusing an existing entry for a new vendor or service. In general, it is better to delete an unused service or vendor and then create a new one. This procedure ensures that all links to the unused service or vendor are eliminated.
- e. You can only enter 999,998 Vendors. This limitation is by design and has been chosen for performance reasons. It can be increased through a code change if desired.

## Chapter 3: Adding and Maintaining Services

### Adding Services

To add a new service click the “Add Service” button on the main Window. The “Service Maintenance” window appears with a default new Service named by “New Service ###” where ### is the next available number that VM will use internally to identify the service. The other fields in the window are empty at this time. You can change the Service Name and Description as you wish and click the “Save” button to write the information to the database.

### Maintaining Services

Ideally you will never change the Service Name or Description of an existing service. However, if you'd like to do so or change the vendor ranking for a specific service, simply double-click the service in the “Services” list on the main window. Once the Service Maintenance Window is open you can use the Service list on the left of the window to change your service selection. Remember to click the “Save” button whenever you leave a service that you made modifications to or before closing the “Service Maintenance” window.

### Deleting Services

To delete a service, open the “Service Maintenance” window as described above, select the service to be deleted in the list on the left of the window and click “Delete”. You will be asked to confirm the deletion before VM actually removes all references to the service. THIS PROCESS IS NOT REVERSIBLE! Once a service has been deleted, all information about the service including the mappings to all vendors providing the service and the Ranking are gone.

## Chapter 4: Adding and Maintaining Vendors

### Adding Vendors

To add a new Vendor, click the "Add Vendor" button on the main Window. The "Vendor Maintenance" Window opens with only the "Name" field filled in. The default name for a new Vendor is "New Vendor ####" where #### is the next available vendor number used by VM to identify the record. After typing the appropriate information into each field you must save the new vendor by clicking the "Save" button.

The screenshot shows the "Vendor Maintenance" window with the following fields and values:

- Name: Pediatric Group
- Address: 1616 Kentucky Bldg C Ste 210
- City/State/Zip: Bigtown TX 85340
- URL: (empty)
- email: (empty)
- Phone: (empty)
- Fax: (empty)
- Contacts: (empty)
- provides Services: Add (button), New Service 3, New Service 5, New Service 2, New Service 7, New Service 6
- Info: (empty)

Buttons: SAVE, Delete, Add, Close

### Maintaining Vendor Information

To view or modify a specific vendor's information click the vendor's entry in the "Vendors" list in the main window. This opens the "Vendor Maintenance" window and loads the selected vendor's information. You can modify the information in the white text boxes. Once you are satisfied with your modifications, click the "Save" button to write your changes to the database and make them permanent. Be sure to always click "Save" after making modifications to a vendor's information before either selecting a different vendor from the drop-down list at the top of the window or closing the "Vendor Maintenance" window.

### ***Special Fields***

The bottom half of the "Vendor Maintenance" window contains three special use fields:

- The "Contacts" field is used to capture multiple contact names, locations or phone numbers. It is a free-form text field that can be edited in the same way a text document is typically edited in "Notepad".
- The "Info" field works the same way as the "Contacts" field. It is used to capture narrative style information about the vendor, remarks, history and other useful things. The separation between the two fields is purely for usability purposes but there is no limitation as to the content or usage of these fields.
- The "provides Services" field can not be edited. It is a list of services provided by this vendor, established as described in "Establishing Vendor/Service Relationships".

### ***Deleting Vendors***

To delete a vendor, open the "Vendor Maintenance" window as described above, select the vendor to be deleted in the drop-down list at the top of the window and click "Delete". You will be asked to confirm the deletion before VM actually removes all references to the service. THIS PROCESS IS NOT REVERSIBLE! Once a vendor has been deleted, all information about the vendor including the mappings to all provided Services and the Ranking for each of those services is gone.

## Chapter 5: Mapping and Ranking

### ***Establishing Vendor/Service Relationships***

To establish a relationship between a vendor and a service you must first ensure that the service exists in VM. Open the Vendor's information as described above. By single-clicking on the "Add" button or an existing service entry in the "provides Services" list you open the "Services" window which provides a list of available services you can associate with the vendor.

By single-clicking an entry in the list you establish the relationship between the Service and the selected vendor. This updates the mapping table and refreshes the list automatically and the service you just added to the vendor disappears from the list. By default a new association puts the vendor at the bottom of the vendor list for the service. If you don't want to prioritize this vendor over others for the service you can just leave the configuration as is. Please refer to "Changing Vendor Ranking" for more information.



### ***Disassociating a Service from a Vendor***

In the event a vendor no longer provides a particular service, you can disassociate the vendor from the service. Open the vendor's information as described above and then double-click on the service the vendor has discontinued. You will be asked to confirm the disassociation before VM deletes the mapping. This process also eliminates the vendor's ranking for the discontinued service. You have to re-establish a new ranking if you re-associate the vendor with this service. (see "Changing Vendor Ranking")

### ***Changing Vendor Ranking***

Vendor Manager maintains ranking information on a "by Service" basis. This allows you to establish vendor rankings for each service individually. While a vendor may be your first choice when it comes to service A, they may lower or even last choice as a provider for Service B. When a relationship is established between a Vendor and a Service, the vendor is added to the bottom of the list for that service. This is the default display order for the vendors for each service. It is more desirable to have the vendors listed in the order in which you *prefer to use* their services.

This is done by changing the order of the vendors in the "Vendor Ranking" list of the "Service Maintenance" Window.

To change the Vendor ranking for a particular service you must first open the "Service Maintenance" window for the service as described above. Then select the vendor you want to move up or down in the list. Use the "UP" and "DN" buttons to change the vendor's position in the list. Continue this with every vendor you want to move up or down. When you're done, close the "Service Maintenance" window. You do not need to click the "Save" button unless you have edited the Service Name or Description. All Ranking changes are immediately permanent after they were made. The changed display order appears then next time you click on the Service in the main window.

## Chapter 6: Security, Authentication and Operator Setup

### **Security Structure**

You may wish to restrict individual users' access to the Service and Vendor data. For example you may reserve the right to make changes to the vendor and service data yourself and allow anyone to view the data. This can be accomplished by means of creating and maintaining Operator Ids in VendorManager and assigning them the appropriate access permission.

There are three access levels implemented in VendorManager:

- Viewers  
are allowed to view all data in the tool.
- Users  
have all Viewer level permissions but are also allowed update the data
- Administrators  
have all Viewer and User permissions and are allowed to maintain Operators and change global settings in addition.

### **Authentication Modes**

To ensure only specific individuals access certain data all users will be asked to authenticate when they reach the next level of permission required for the desired change. VendorManager handles these either as persistent permissions or as on-demand permissions. To maintain the permission level of a particular user throughout the entire time the application is running (persistent permissions) a operator must enter their user ID and Password in the first Authentication window (shown below) that appears when the VendorManager is started.



Once successfully authenticated the user will never be asked to authenticate again until they exit and restart VendorManager or attempt an operation that exceeds their assigned permissions. The Operator has the option to escape (hit the "Esc" button) out of the first authentication window. This will establish on-demand authentication mode. The operator will be asked to provide a user ID and password every time they attempt an operation that exceeds the Viewer level permissions.

## Operator and System Configuration

The “Configuration” button on the main window opens the Operator maintenance Window. Depending on the current settings you may receive an authentication request. Any operator accessing the VendorManager configuration must have administrator level permissions assigned to them or access will be denied. The default user ID in the system after installation is “admin” and the associated password is “password”.

**Operators**

**Basic Setup:**

Data Source Name:

Use Id/Password Authentication

**Operator Setup**

User ID:

Full Name:

Password:

User Level:

Add User

Update User

Exit

## Application Parameters

In the top part of the “Operators” window the administrator has the option to change the name of the ODBC Data source VendorManager utilizes to connect to it’s database. This may be helpful if another tool uses the same data source name for its connection or if more than one database exists.

Below the “data Source Name” field is a check box that indicates and changes the security mode of VendorManager on the local computer. The Administrator can decide to globally turn the permissions management on or off. If the check box is checked the above mentioned security features and authentication modes apply. If unchecked, VendorManager will never ask an operator to authenticate and all Operators have access to view and update all data including Operators and the “configuration” button.

### **Adding Operators**

The Administrator may add user by clicking the "Add User" button. This will create a temporary account record that can be edited by the Administrator. To make the new account permanent the Administrator must click the "Update User" button.

### **Changing Operators**

The Administrator can select any existing user's account by clicking the down arrow to the right of the "User ID" or "Full Name" fields. This will display a respective list of accounts from which the Administrator may select the one to be updated. Changes are made by simply editing the three fields and assigning user level permissions by means of using the respective drop-down list. To make any change permanent the Administrator must click the "Update User" button.

### **Deleting Operators**

The Administrator may choose any user's account from the "User ID" or "Full Name" lists and remove them from VendorManager by clicking the "Delete User" button that appear on any Administrator created accounts. The default Administrator account may be edited and updated but is cannot be deleted in order to guarantee continuous functionality of the application.

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If you don't like the product or have suggestions for improvements please let us know as well.