# SUMMARY ROADMAP - ROLES AND RESPONSIBILITIES

| | Department | Vendor | PaymentWorks | Purchasing Division |
|---|---|---|---|---|
| 1 | Establish need for a vendor number based on a pending procurement transaction | Receives the invitation to register via PaymentWorks after submitted | Facilitates the invitation delivery via email | Reviews and provides final approval (or rejection) of each vendor at conclusion of onboarding process |
| 2 | Search and validate first in the SAP Vendor Master Data that needed vendor is not currently available for use | Follows directions provided within PaymentWorks email to create an account | Facilitates the online registration form after the vendor creates account | Ensures all vendors meet required University business protocols and validations including those directly related to risks |
| 3 | Send PaymentWorks invitation for new vendor registration | Receives PaymentWorks verification email and link to complete online registration form | Provides automatic reminders if supplier has not completed all steps | Provides internal support information and access to departments as needed and upon request |
| 4 | Monitor PaymentWorks dashboard console for onboarding progress | Completes online form and Submits | Provides support information and access to vendors as needed and upon request | Manages overall process including management of all onboarding processes across other stakeholders |
| 5 | Once vendor has status of Approved, identify the vendor number in SAP Vendor Master Data and apply it to the pending procurement transaction. | Contacts PaymentWorks for support | Provides automated dashboard for departments to monitor onboarding progress | Manages all related aspects of SAP Vendor Master Data post-onboarding |

# STAKEHOLDER ROLES AND RESPONSIBILITIES IN PAYMENTWORKS NEW VENDOR ONBOARDING

**Refresher:** There are four stakeholders in the PaymentWorks new vendor onboarding process:

1. Departmental user
2. New vendor being onboarded
3. PaymentWorks
4. Purchasing

# DEPARTMENT'S ROLES AND RESPONSIBILITIES

Department's roles and responsibilities are:

1. Establish need for a vendor number based on a pending procurement transaction
2. Search and validate first in the SAP Vendor Master Data that the needed vendor is not currently available for use
3. Send PaymentWorks invitation for new vendor registration
4. Monitor PaymentWorks dashboard console for onboarding progress
5. Once vendor has status of **Approved**, identify the vendor number in SAP Vendor Master Data and apply it to the pending procurement transaction.

# VENDOR'S ROLES AND RESPONSIBILITIES

During the onboarding process, the vendor's roles and responsibilities are:

1. Receives the invitation to register via PaymentWorks after submitted
2. Follows directions provided within PaymentWorks email to create an account
3. Receives PaymentWorks verification email and link to complete online registration form
4. Completes online form and Submits
5. Contacts PaymentWorks for support if needed

# PAYMENTWORKS' ROLES AND RESPONSIBILITIES

PaymentWorks provides and manages the platform and provides support to vendors:

1. Facilitates the invitation delivery via email
2. Facilitates the online registration form after the vendor creates account
3. Provides automatic reminders if supplier has not completed all steps
4. Provides support information and access to vendors as needed and upon request
5. Provides automated dashboard for departments to monitor onboarding progress

# PURCHASING DIVISION'S ROLES AND RESPONSIBILITIES

Purchasing's role in the onboarding process:

1. Reviews and provides final approval (or rejection) of each vendor at conclusion of onboarding process

2. Ensures all vendors meet required University business protocols and validations, particularly those directly related to risks

3. Provides internal support information and access to departments as needed and upon request

4. Manages overall process including management of all onboarding processes across other stakeholders

5. Manages all aspects of SAP Vendor Master Data post-onboarding