

WebCenter Admin - Vendor Reports Manual

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Vendor Portal Reporting

You can give your Vendor Contacts access to different report options in WebCenter. This is a great way to provide access to information your Vendors might want.

This article covers:

1. [How to Give Vendors Access to Reports](#)
2. [How Vendors Can Pull Reports](#)
3. [Overview of Reports Available](#)

Note Looking for other WebCenter Reporting Options? Check out [WebCenter Reports Manual](#) for more customer specific reporting options and [TimeClock Reports Manual](#) for TimeClock specific reporting.

How to Give Vendor Contacts Access to Reports

You can pick and choose which reports each Vendor Contact has access to. This is a great way to customize their Vendor Portal experience.

Giving Access to the Reports Tab

In order to see and run any reports in WebCenter, the customer contact must have a role that will give them access to the reports tab.

1. In WebCenter Admin, Navigate to the Roles tab

2. Review the vendor roles available and pick one that will have the reports option checked

Default	Name	Description	Actions
<input checked="" type="radio"/>	Vendor	Default role for a Vendor Contact that logs into the VMS portal of WebCenter.	
<input type="radio"/>	Vendor Limited	Used for vendors that will not be using reporting or documents sections	

Role Settings and Permissions

Role Name: Vendor

Role Description: Default role for a Vendor Contact that logs into the VMS portal of WebCenter.

Role Permissions

- Common** - Functionality available to every type of user
- Profile - Info** - Allows a user to edit their email, password
- Profile - Notifications** - Allows user to re-subscribe to unsubscribed notifications
- Vendor - Documents** - Shows a list of documents a vendor can download
- Vendor - Employees** - Allows a vendor to add and edit employees
- Vendor - Home** - Shows vendor a list of links to the types of orders and their counts, and also shows alerts and messages
- Vendor - Orders** - Allows a vendor to review, approve and reject orders
- Vendor - Reports** - Shows vendor a list of reports they can run

Save

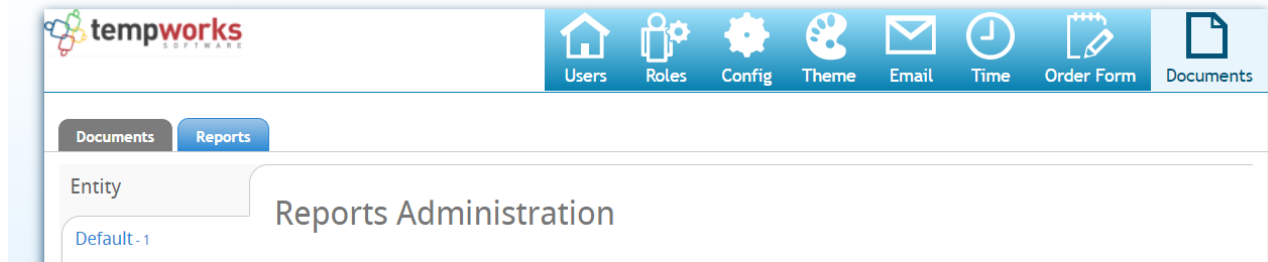
If you want to give only some contacts access to reporting, consider having a role named "Vendor with Reports" to make it clear when assigning the role that they will have access to reports.

To learn more about giving Vendors access, check out [WebCenter Admin - Giving Vendors Access to the Web Portal](#).

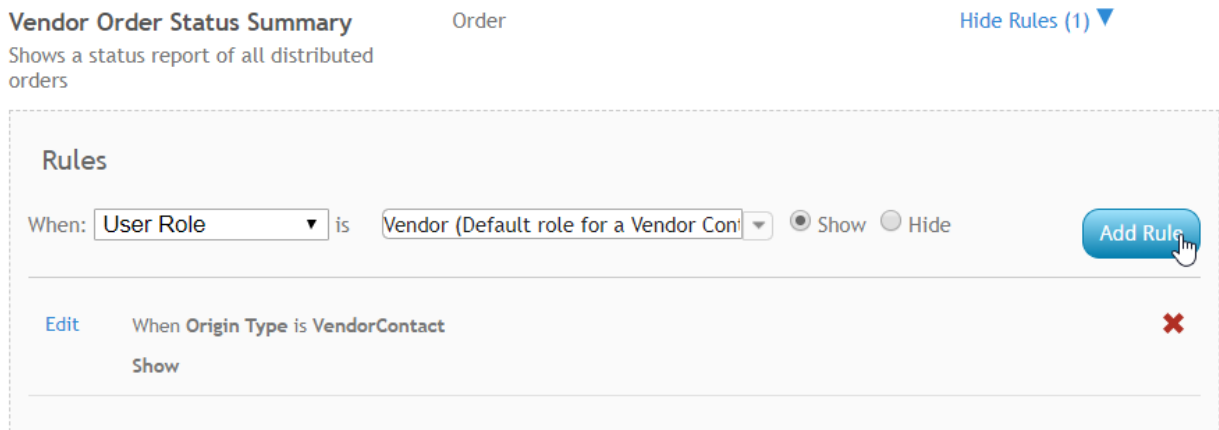
Access to Specific Reports

If you want to pick and choose the reports a contact can run, navigate to the Documents

tab in WebCenter Administration.



Here you will be able to select the Reports tab and see a full list of all the reports available. You can create rules under each report to show or hide that report based on a vendor role, vendor, or contact name.



How Vendors Pull Reports

Once you have given a Vendor access to reports, they will be able to pull the reports available anytime from the Vendor Portal.

1. Navigate to the Reports Tab



2. Select Run Report next to the report you wish to run

The screenshot shows the WebCenter 6 interface. At the top, there are navigation tabs for Home, Orders, Employees, Reports, and Documents. Below the tabs is a search bar with a dropdown menu set to 'All' and a search icon. There are two report cards displayed:

- Vendor Order Status Summary:** Shows a status report of all distributed orders. It has a 'Run Report' button and a link to 'Order'.
- Vendor Payments:** Shows a list of all payments that a staffing agency has not paid. It has a 'Run Report' button and a link to 'Payments'.

Overview of Vendor Reports Available

Below is a list of Vendor specific reporting:

- [Vendor Order Status Summary](#)
- [Vendor Payments](#)
- [Vendor Pending Payments](#)

Vendor Order Status Summary

Purpose: Displays any recent updates to distributed orders including new assignment information. This is a great report to show which Vendor candidates have been recently approved and assigned to work.

The screenshot shows a report header with navigation controls (back, forward, search) and a search bar. The text '1 of 1' is visible in the search bar area.

Vendor Order Status Summary

Jurassic World Gardening Headquarters Primary

All active orders

Order number	Status	Created	Job title	Start Date	Required	Assigned	Fill Ratio
4295092487	Unfilled	3/12/2020	Warehouse Worker	6/1/2020	10	1	10%
SSN / ID	Employee	Job title	Assigned	Start date	End date	Rate	Assigned by
ID: 4295083545	Murphy, Lex	Warehouse Worker	5/11/2020	5/12/2020		\$19.00	amelia.stout

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Vendor Payments

Purpose: Displays a list of payments made to Vendor including a breakdown of which employee transactions were included on the check.

Start Date End Date

1 of 1 Find | Next

Vendor Payments

Jurassic World Gardening Headquarters Primary
 Payments with a check date between 1/1/2020 and 5/10/2020

Employee	SSN or ID	WeekendBill	Amount	Status
Check number: 102131				
Finch, Atticus	xxx-xx-2130	11/24/2019	\$691.00	Paid
Check number: 102179				
Dearing, Claire	xxx-xx-6721	1/5/2020	\$760.00	Paid
Dearing, Claire	xxx-xx-6721	1/19/2020	\$760.00	
Check number: 103113				
Dearing, Claire	xxx-xx-6721	1/26/2020	\$760.00	Paid

Parameters:

- **Start Date:** Earliest date a check could have been printed for
- **End Date:** Latest date a check could have been printed for

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Vendor Pending Payments

Purpose: Displays a list of transactions by employee that have not been paid out to the Vendor yet. For example, perhaps the transaction has been run through subpush run but has not been consolidated onto a Vendor check yet (subpaycons). Some of these transactions may not be ready to pay yet depending on the pay delay in days setting on the Vendor record.

1 of 1 Find | Next

Vendor Pending Payments

Jurassic World Gardening Headquarters Primary
 Timecards that have been processed but have not been paid out yet

Employee	SSN or ID	Week Processed	Amount	Status
Finch, Atticus	xxx-xx-2130	1/19/2020	\$800.00	Pending
Report Total:			\$800.00	

Note To learn more about the subcontractor payroll process, check out [Vendors - Paying Subcontractors in Enterprise](#).

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