

Create a New Vendor

Each vendor in your system is represented as an entity and has a vendor account. When you add a vendor, RiskVision creates an entity and an account.

You can add, remove, and update general information for the vendor, such as their name and address, from either the vendor's entity details or the vendor's account on the **Users & Roles** page.

Creating a new vendor requires Vendor View, Vendor Create, Vendor Service View, and Vendor User View permissions.

To create a new vendor:

1. Go to **Vendors > Vendors**. Select a group of vendors.
2. Click **New Vendor**.

The screenshot shows a 'Create a Vendor' wizard window. The title bar reads 'Create a Vendor' with a close button. On the left is a navigation pane with steps: 1. General (selected), 2. Owners, 3. Vendor Contacts, 4. Addresses, 5. Documents, 6. Assessments, and 7. Review. The main area is titled 'Step 1: Provide Basic Vendor Information' with a red asterisk indicating required fields. Below the title is a yellow instruction bar: 'Enter vendor name and other information.' The form contains several fields: 'Name*' (text input with 'Wiley Janitorial Service'), 'Vendor Status*' (dropdown menu with 'New'), 'Type' (dropdown menu with 'Supplier'), 'Tier' (dropdown menu with 'Tier 1'), 'Engagement Name*' (text input with 'Monthly supply deliveries'), 'Engagement Type' (dropdown menu with 'General'), and 'Engagement Level' (dropdown menu with 'Level 1'). To the right of these fields is a section for 'Allow Login Access' with radio buttons for 'Yes' (selected) and 'No'. Below that is a 'Description' text area containing the text: 'Wiley will provide consumable supplies on a regular (monthly) basis.' At the bottom of the window are three buttons: 'Cancel', '< Back', and 'Next >'.

The Create a Vendor wizard.

3. Enter the following fields:

Parameter	Description
Name	The name used to identify this vendor across all engagements.
Vendor	Click New for a new vendor relationship.

Parameter	Description
Type	Optional. Select the vendor type.
Tier	Optional. Some organizations classify vendor relationships with tiers.
Engagement Name	A vendor relationship can comprise many engagements. Enter a name for the first engagement. Once the vendor is created, create additional engagements as needed.
Engagement Type	Optional. Specify the type of the first engagement.
Engagement Level	Optional. Some organizations classify engagements into levels.
Allow Login Access	Will this vendor be granted access to the RiskVision system? If you choose No, a user with RiskVision access will need to update the vendor and engagement information.
Description	Enter an optional description to be associated with this vendor. Note that you can upload contracts, SLAs, PDF brochures and other materials in a later step.

4. Click **Next**.
5. Enter the owner information. Owners are people on the organization side who manage the relationship with the new vendor. By default, the user who creates the vendor is the Primary Owner, but you can select another user to be the Primary Owner. You can also select others in the organization who will be authorized to update the vendor's status.

Create a Vendor
✕

1. General

2. Owners

3. Vendor Contacts

4. Addresses

5. Documents

6. Assessments

7. Review

Step 2: Set owners who will be managing this vendor and its assessments. * = required

Owners are the users in your organization who would manage the vendor and participate in the assessment workflow such as reviewing assessments and signing-off.

Owners

Primary Owner* Administrator ▼

Additional Owners:

Add Owners
Delete
More Actions... ▼
Filter by - Show all - ▼
Refresh

<input type="checkbox"/>	Name	Type	Ownership Type
i	No additional owners defined.		

Cancel
< Back
Next >

The Owner wizard page.

6. Click **Next**.
7. The **Vendor Contacts** wizard page appears. Enter contact information and an initial password for the primary vendor contact. The primary vendor contact must change their password the first time they log in. Note that the initial password is subject to minimum length and other password constraints.

Create a Vendor
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- 1. General
- 2. Owners
- 3. Vendor Contacts
- 4. Addresses
- 5. Documents
- 6. Assessments
- 7. Review

Step 3: Set Vendor Contacts * = required

Enter the primary vendor contact information. Either you or the primary contact can add additional contacts. During the first login, the contact will be forced to change the password.

Username*	First name*
Joemathew	Joe
Password*	Middle initial
••••••••	S
Confirm password*	Last name*
••••••••	Mathew
Email Address*	
jmathew@agilance.com	

Notifications

Notify the user via email of the account access information.

Notification Template

New Vendor Contact Notification
▼
Preview

Personal Message (optional)

Additional People to Notify (enter email addresses separated by commas)

Jscott@agilance.com

Send me a copy of this email.

Cancel
< Back
Next >

The primary vendor contact is given the Vendor Administrator role. You, or the new primary vendor contact, can add additional vendor users later.

8. Click **Next**.
9. Enter the primary and billing addresses for the new vendor, or check the **Do not maintain addresses** for this vendor checkbox. You can add addresses for the vendor at any time.

Create a Vendor
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1. General

2. Owners

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Step 4: Set Vendor Addresses
* = required

Enter primary and billing addresses for the vendor. You can add additional addresses later.

Do not maintain addresses for this vendor. Note: This setting can be changed in the edit pane.

Primary Address

Address 1*
622 N. Wild Horse Parkway

Address 2
Suite 7685

City*
Los Angeles

State/Province*
CA

Zip Code / Postal Code*
90066

Country
USA

Region

Building

Floor

Billing Address

Same as the Primary Address

Address 1*

Address 2

City*

State/Province*

Zip Code / Postal Code*

Country

Region

Building

Floor

Cancel
Next >

The Address wizard page.

10. Click **Next**.
11. **Optional:** New vendors often have contracts or SLAs associated with them, or your organization may have a relevant policy or SOP document. [Attach documents](#) by:
 - Uploading new documents;
 - Referencing documents already in the Document Repository;
 - Adding links to web pages; or
 - Adding a Network Path.

Create a Vendor
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- 1. General
- 2. Owners
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Step 5: Add Documents and Links * = required

Optionally add documents (such as Policies and SLAs) and web links to share with this vendor. Private documents are visible to your organization owners only. Non private documents are visible to your organization owners as well as vendor contacts.

Add a Document or Link

Add a document

Document Location*

No files selected.

Document Caption

Description

Expires On

Private Document

Add a link to a document in repository

Add a web link

Add a Network Path

The Document wizard page.

12. Click **Next**.

13. Select the **Add to ongoing Program**, **Create a new Program to assess with** or **Do not assess at this time** radio button. If you choose to add the vendor to an ongoing program, the assessment will only be created for the engagement. If you choose to create a new program, the new program wizard will start as soon as you finish the new vendor wizard.

Create a Vendor ✕


- 1. General
- 2. Owners
- 3. Vendor Contacts
- 4. Addresses
- 5. Documents
- 6. Assessments**
- 7. Review

Step 6: Launch Assessments for the Vendor ^ = required

Add the vendor to ongoing Programs or create a new Program. You can also specify a due date for the Assessment.

Add to ongoing Programs

Create a new Program to assess with.

 You will be guided through the steps to create a new Program after you click on the finish button.

Do not assess at this time

The Assessments wizard page.

14. Click **Next**.
15. Review the new vendor details.

Create a Vendor ✕

1. General | **Step 7: Review and Confirm** * = required

2. Owners

3. Vendor Contacts

4. Addresses

5. Documents

6. Assessments

7. Review


Review the vendor details and click Finish to complete the vendor creation process. It will also launch assessments if specified.

Name
Wiley Janitorial Service

Primary owner
Administrator

Contact Name
Bob Davis

Assessments

 You have selected not to assess this vendor at this time.

The Review wizard page.

16. Click one of the following buttons:
- **Finish:** Create the new vendor.
 - **Back:** Make changes.
 - **Cancel:** Cancel the creation of a new vendor.