



# CORE

Colorado Operations Resource Engine

EMPOWERING EFFICIENCY

# Vendor Setup and Maintenance

Joshua Bastian, State of Colorado

Derek Duran, CGI



# Agenda

- Purpose
- Why CORE?
- What's New?
- Policy & Procedure Overview
- System Demo
- Question & Answer

# Purpose

- Changes from COFRS to CORE
- New State Policies Surrounding Vendor Creation and Maintenance
- How to Search for Existing Vendor Records
- How to Create New Vendor Records



**CORE**

Colorado Operations Resource Engine

EMPOWERING EFFICIENCY

Confidential and Proprietary material of Colorado and CGI.  
Documents contain material for Colorado's internal use only

# Why CORE?

- Provides a Central Repository for Vendors and Customers
- User Friendly Vendor/ Customer Creation
- Streamlined Business Processes
- Better Record Management



**CORE**

Colorado Operations Resource Engine

EMPOWERING EFFICIENCY

Confidential and Proprietary material of Colorado and CGI.  
Documents contain material for Colorado's internal use only

# What's New?

- Statewide Cleansing and Standardization of Vendor Data
- Records Will Be Added and Maintained Through Vendor Customer Creation (VCC) and Vendor Customer Maintenance (VCM) Documents
- The VCUST Table Will be the Central Repository for Vendors and Customers
- A Record can be: A Vendor, A Customer, Both Vendor/Customer
- Each Record will have a Vendor Customer ID as a Unique Identifier
- Vendor Self Service (VSS)



# Policy & Procedure Review

*Vendor Customer Creation (VCC)  
and Vendor Customer Maintenance  
(VCM) Documents*

# Vendor Customer Creation (VCC)

- Vendor Creation Through Vendor Self Service(VSS)
- No Duplicate TINs and SSN/ITIN/ATINs
- Active Vendors on Document Submittal
- Headquarter (HQ)→ Branch Relationship- no duplicate vendors
- EFT Request Form
- One Miscellaneous Vendor/Customer per Department

# Vendor Customer Modification (VCM)

- Vendor Customer Maintenance will Reflect Current Business Processes
- Vendor and Customer Changes will be Controlled Centrally by the Office of the State Controller (OSC)



**CORE**

Colorado Operations Resource Engine

EMPOWERING EFFICIENCY

Confidential and Proprietary material of Colorado and CGI.  
Documents contain material for Colorado's internal use only



# Demo

# Vendor Customer Creation (VCC) Document

The Vendor/Customer Creation (VCC) document allows you to add new records to the Vendor/Customer table and 1099 Reporting Information table. Only one Vendor/Customer record can be created per document. A single record may be both a Vendor and a Customer.

# Vendor Customer Modification (VCM) Document

A Vendor/Customer Modification (VCM) document is used to modify or add to an existing vendor or customer record. This document is used to update Vendor Customer table information and 1099 Reporting Information table information. Only one Vendor/Customer record can be modified/added per document.

# Vendor Customer Table (VCUST)

The Vendor/Customer (VCUST) table maintains information for Vendors and Customer information. It is a central repository for additional Vendor/Customer information such as EFTs, 1099 Reporting Information, and multiple address types.



# Live System Demo

*VCC: Creating a New Vendor*



**CORE**

Colorado Operations Resource Engine

EMPOWERING EFFICIENCY

Confidential and Proprietary material of Colorado and CGI.  
Documents contain material for Colorado's internal use only



# Review

# Key Takeaways

- New Vendor Self Service (VSS) Module
- Robust Vendor/Customer Record Capabilities
- A Record can be Both a Vendor and Customer
- Vendor Maintenance will Reflect Today's Processes



# QUESTIONS

# A Few Reminders

- Test Drive CORE - Room 602
- Training Starts in April
  - Registration instructions emailed to all
  - Register promptly for best selection of times and locations
  - Send training questions to: *core.training@state.co.us*
- At end of conference, fill out the CORE Conference evaluation
  - In your packet
  - Turn it in to any Conference Ambassador in a green shirt



**CORE**

Colorado Operations Resource Engine

EMPOWERING EFFICIENCY

Confidential and Proprietary material of Colorado and CGI.  
Documents contain material for Colorado's internal use only

# Stay in Touch with CORE

- Read your emails from CORE.news & CORE.training
- Send questions or comments to CORE.news@state.co.us
- Request access to CORE Project website  
by sending email to CORE.news@state.co.us
- Talk to your department leaders and CORE functional experts
- Share what you know with others on your teams



# CORE

Colorado Operations Resource Engine

EMPOWERING EFFICIENCY

# Thank You

