

QUICK START GUIDE: SUPPLIER ACCOUNT MANAGEMENT IN MDM

What is MDM? Who is it for?

FedMall data, sourced from suppliers as well as external interfaces, is brought together to form a set of “golden records” by Master Data Management (MDM). MDM incorporates data from various feeds, manages workflow, and provides a user interface (UI) for select users to have direct access to the data. This guide focuses on the UI elements, and namely those pertaining to DLA personnel functioning as Supplier Account Managers (SAMs).

MDM has been designed to minimize the direct manipulation of data by users as much as possible; instead, wherever possible, business rules and external sources of authoritative data are used to automate the verification and maintenance of data in the system. On top of this, best practices suggest that Suppliers should manage and be responsible for their own data wherever feasible as primary use cases. These two principles combined mean that there will be more features available in MDM than are likely to be used on a frequent basis.

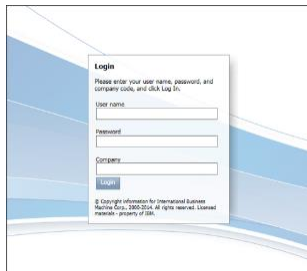
Although MDM is capable of many tasks, the primary ones for SAMs are:

- Reviewing pending requests for changes to catalog items
- Spot checking data quality of supplier data
- Troubleshooting data-related errors in supplier data, including the possibility of making minor data changes.

Accessing MDM

To login, visit <https://www.mdm.fedmall.mil>.

(Please bookmark this link; by design, it is not directly linked to from the FedMall home page.) Enter username, password, and company; note that all credentials are case sensitive.



CAUTION

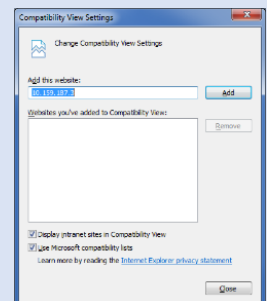
MDM offers direct access to the data of FedMall. Users are advised to be cautious and deliberate in their actions, as the greater power needed by MDM users necessarily implies the absence of as many safeguards as exist in other FedMall user interface components.

All features necessary to the job of the Supplier Account Manager are accessible from the home page and/or the Master Catalogs in the Modules pane on the left.

TECHNICAL REQUIREMENTS

MDM is best viewed in Internet Explorer (IE). Other web browsers may not be fully compatible with all required features.

If a feature does not behave as expected even when using IE, consider enabling Compatibility View for this site (*Gear* menu -> *Compatibility View settings*).



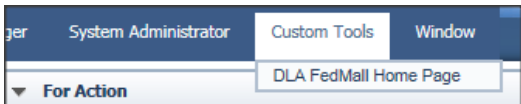
MDM TERMINOLOGY

- MDM consists of a set of data collections, generally referred to within the software as *Master Catalogs*. These catalogs are distinct from the concept of a selling catalog (as seen in Commerce) or the catalog of items associated to a contract (as seen in the Supplier Portal).
- Supplier registrations transition through a sequence of *steps* comprising the Supplier Registration *workflow*. The workflow is generally transparent to end users, but can be viewed in the *Collaboration Area Console*.
- In a distinct but analogous process, new or edited catalog items arriving from the Supplier Portal progress through various *states* of a *state machine*, where the State attribute is maintained in the item record itself.

QUICK START GUIDE: SUPPLIER ACCOUNT MANAGEMENT IN MDM

The Home Page

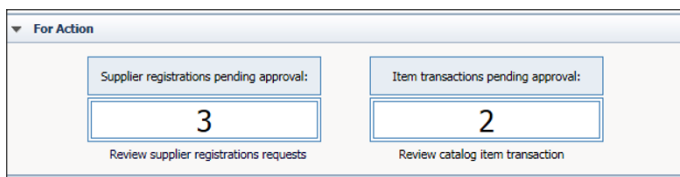
Upon first logging in to FedMall, you will arrive at the home page. At any time, you can return to the home page from the navigation menu (*Custom Tools -> DLA FedMall home page*).



There are three sections on the home page:

For Action Section

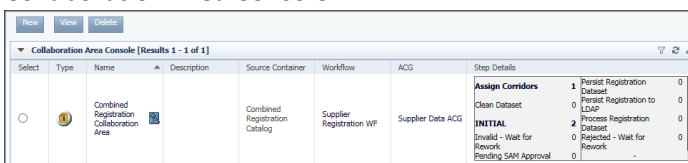
This section highlights any pending actions requiring MDM user approval.



SUPPLIER REGISTRATIONS PENDING APPROVAL

This counts the number of new or updated registrations, initiated by Supplier users via the Supplier Portal, which are in the process of transitioning through the various steps of the workflow. Under current business rules (i.e. for FedMall Business Release 1), no workflow steps require MDM user approval. Rather, the approvals are performed as a set of automated processes. As a result, under most circumstances, registrations will process speedily through this workflow, and it is expected that the count of pending registrations will remain zero most of the time.

Click the number of pending registrations, or the words “Review supplier registration requests,” to open the Collaboration Area Console.



Select	Type	Name	Description	Source Container	Workflow	ACG	Step Details
<input type="radio"/>	1	Combined Registration Collaboration Area	Combined Registration Catalog	Supplier Registration WF	Supplier Data ACG	Supplier Data ACG	Assign Corridors 1 Permit Registration Detail 0 Permit Registration to LIMP 0 INITIAL 2 Process Registration Dataset 0 Invalid - Wait for Rework - Wait for Rework 0 Pending SAM Approval 0

Here you can view what stage in the workflow each pending registration is currently in. In the event that a Supplier user wants to confirm that a registration didn't get “stuck” in the process, this screen may help with troubleshooting by confirming whether it's still under automated review or not.

ITEM TRANSACTIONS PENDING APPROVAL

This counts the number of transactions containing new or updated catalog items pending approval. Catalog changes (additions or item modifications) are initiated by the Supplier via the Supplier Portal using one of two methods:

- Bulk catalog changes by uploading a .csv file;
- Individual catalog changes made directly within the Supplier Portal.

Supplier-initiated catalog changes will only appear for MDM user review when the items are part of a contract (e.g. a Long Term Agreement or Blanket Purchase Agreement). Additions of or changes to items submitted as part of the new FedMall MarketPlace program are automatically approved, do not require MDM user manual approval, and will not appear in this list of pending transactions.

To view these pending transactions, click on the number of pending approval items, or on the words “Review catalog item transactions.” From here, open each transaction, conduct a spot check or detailed review of each pending change, and approve or reject each record.

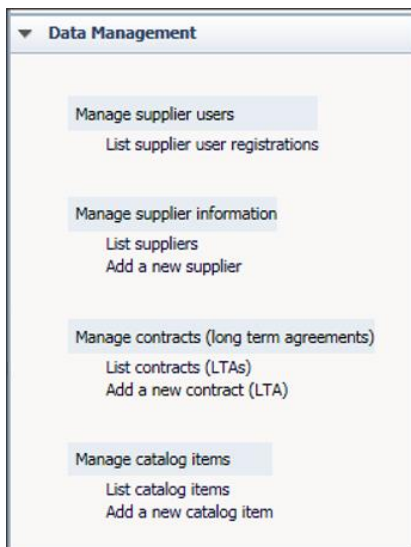
- From the transactions screen, select (check) the items to approve (or reject) and click the applicable header button to bulk approve or bulk reject the selected items.
- From the individual catalog item screen, click the Approve or Reject button in the header to affect that individual item.

QUICK START GUIDE: SUPPLIER ACCOUNT MANAGEMENT IN MDM

Data Management Section

This section highlights the four key types of information maintained by MDM:

- **Supplier users:** the individuals representing the supplier entity
- **Suppliers:** the organizations offering supplies
- **Contracts:** includes all contract types (e.g. long-term agreements, blanket purchase agreements) as well as the MarketPlace “pseudo-contract.” Although MarketPlace items are not under a traditional “contract,” such items are grouped under a Contract entity with a Contract Number equal to “MARKETPLACE_[CAGE]” (where “[CAGE]” is replaced with the 5-character CAGE code of the Supplier).
- **Catalog items:** identified by part number within a given contract.



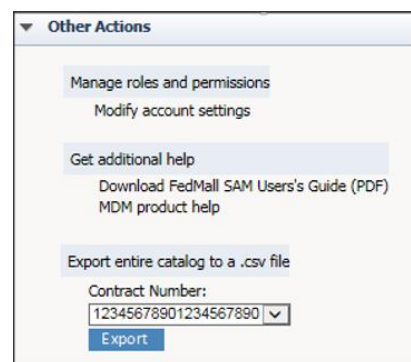
For each of these four data types, the MDM user may list the data within that collection, and from there may view, edit, or delete the information, as applicable. The MDM user may also add new data to each of these collections, with one exception: new supplier users may only be added from the Supplier Portal, not from MDM, because new supplier users must have an associated certificate name, which must be obtained directly from the Supplier user’s CAC card, PIV card, and/or soft certificate.

More details are provided in “Navigating MDM Collections,” below.

Other Actions Section

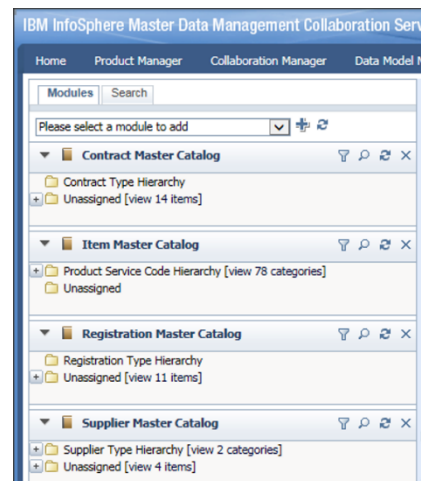
The final section on the home page contains the following features:

- **Manage roles and permissions:** Click “Modify account settings” on the home page to view and edit the MDM user (NOT the supplier user) account profile, password, and roles. Under most circumstances, the MDM user should NOT need to make any adjustments to this screen
- **Get additional help:** These hyperlinks provide access to FedMall-specific and general MDM help resources.
- **Export entire catalog to a .csv file:** This allows the MDM user to export a catalog (selected from the drop-down list) in the same .csv format the suppliers use in the Supplier Portal.



Navigating MDM Collections

Whether conducting spot checks, calling up specific data to review, or browsing the information available in FedMall, MDM users will frequently navigate MDM *collections*. These are accessible from the “List” links on the home page, and from the “Modules” tab in the left pane.

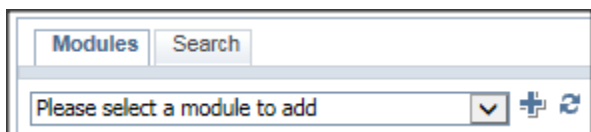


QUICK START GUIDE: SUPPLIER ACCOUNT MANAGEMENT IN MDM

Arranging Modules

MDM will remember the arrangement of modules in the left pane between sessions, so once they are configured, the MDM user will rarely need to modify their arrangement.

To **add a new module**, select one from the “Please select a module to add” drop down list, and then click the “+” button (to the right of the drop-down list) to add it to the left pane.



To **remove a module** from the left pane, click the “X” on the far right of the module header. Removing a module does not delete any data; it only hides it from the left pane.

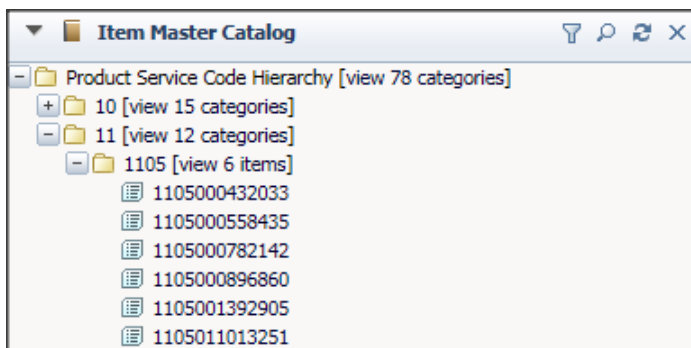


To **collapse/expand a module**, click the triangle icon on the far left of the module header.

Navigating Collections from the Left Pane

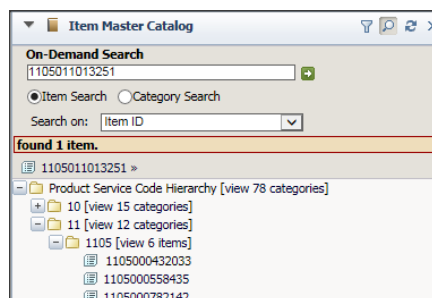
Collections are arranged in hierarchies, and each item in the hierarchy is a hyperlink to an individual record.

To **open a detailed view** of any record, click the record in the left pane, and it will open in the right (main) pane.



To **refresh the contents** of the collection (e.g. if you have recently made changes that you want to reflect in the list), click the double-arrow icon in the module header. (Note: the module must be expanded to see the Refresh double-arrow icon; toggle expand/collapse using the triangle icon on the left).

To **search for an item** in a collection by an exact match to the key value, click the magnifying glass icon to toggle the in-line “On-Demand Search” panel. (An item’s key value is its unique identifier, such as a Contract Number or Item ID, which is the value of the record shown in the hierarchy.) Searches are case-sensitive and require an exact match. Matching results are displayed at the bottom of the On-Demand Search panel.



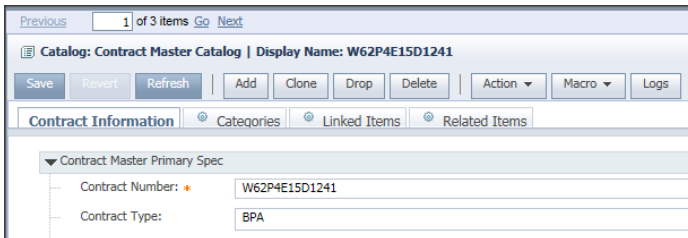
Navigating Records from the List View

Using the “List...” links from the home page, you can call up a tabular view of all items in a given collection. Aside from letting you view more information at a glance than is available in the modules, you can also open multiple records at once and conduct in-place filtering of records.

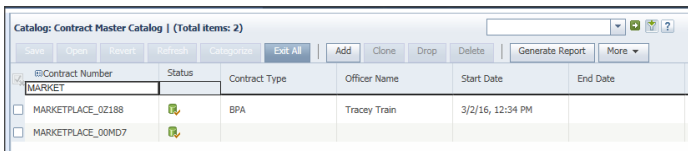
Catalog: Contract Master Catalog (Total Items: 14)												
Save	Open	Refresh	Categories	Edit All	Add	Clone	Drop	Delete	Generate Report	Action	Macro	Logs
ID	Contract Number	Status	Contract Type	Officer Name	Start Date	End Date	Minimum Order Value					
<input type="checkbox"/>	M020301501242		IDIQ	Kim Olinga	3/2/14, 11:00 PM	5/4/19, 11:00 PM	3,000.00					
<input type="checkbox"/>	N002441501234		BPA	Karl O'Malley	1/19/16, 11:00 PM	4/28/19, 11:00 PM	99,000.00					
<input checked="" type="checkbox"/>	W62PME1501241		BPA	Karyn Ostmeier	4/4/05, 12:00 AM	7/6/19, 12:00 AM	5.00					
<input type="checkbox"/>	MARKETPLACE_02188		BPA	Tracey Train	3/2/16, 12:34 PM		0.00					
<input checked="" type="checkbox"/>	1234567890		IDIQ	Jack Smith	1/31/16, 11:00 PM	2/28/16, 11:00 PM	10.00					
<input checked="" type="checkbox"/>	987654321		IDIQ	Jack Smith	1/31/16, 11:00 PM	2/28/16, 11:00 PM	1.00					
<input type="checkbox"/>	N006041501241		IDIQ	Karla O'Hare	2/1/16, 1:06 PM	9/30/17, 1:06 PM	5.00					
<input type="checkbox"/>	MARKETPLACE_00M07						0.00					
<input type="checkbox"/>	9876543210		BPA	Jill Smith	2/8/16, 11:00 PM	2/8/16, 11:00 PM	0.00					
<input type="checkbox"/>	N123456		BPA	James Smith	2/1/16, 12:00 AM	2/1/17, 12:00 AM	5.00					
<input type="checkbox"/>	MD00712345		BPA	Mary White	2/29/16, 11:00 PM	3/30/16, 11:00 PM	1.00					

QUICK START GUIDE: SUPPLIER ACCOUNT MANAGEMENT IN MDM

To **open multiple records** at once, use the check boxes to the left of each record, and then click the “Open” button. A pop-up window will appear, allowing you to cycle between the detailed views of each selected record. Use the “X” in the upper right to close the pop-up window.

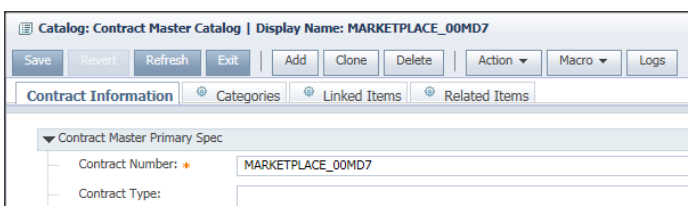


To filter items in the list view, use the Filter icon in the upper right hand corner to toggle filtering mode on. You will be able to enter filtering values on key fields to narrow the results:



Viewing and Editing Data Records in Collections

After clicking on a record from a list or the modules on the left, the record details are displayed on the right. Common actions are displayed across the top.



The minimum required fields are highlighted with a red asterisk (*); however, note that business rules may require more data that this in order to support effective interaction with other business systems. For example, in the Contracts collection, Order Routing information is required of each contract record. Nonetheless, not every Order Routing field needs to be completed (depends on order transmission type). Whereas MDM offers the flexibility to see and manipulate every data field directly,

the Supplier Portal provides the constraints needed to support current business rules.

After making changes, use the **“Save” button** to immediately and permanently change the record and commit those changes to the database.

Use the **“Refresh” button** to discard any changes and retrieve the version of the record currently in the database. This is also useful to display the latest data in the event that another user (or another business process) edits the data.

Use the **“Add” button** to create a new record (akin to using the “Add...” links on the home page).

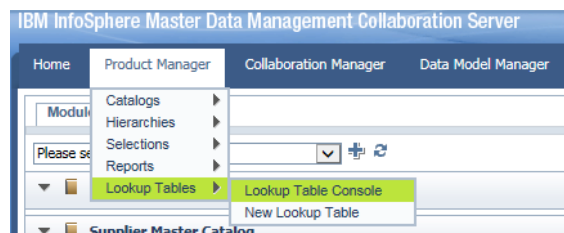
Use the **“Exit” button** to return to the home page.

Managing MDM Lookup Tables

Lookup Tables are used within MDM for several purposes to include:

1. Validate input values received from inbound interfaces (e.g., valid values for FLIS attributes).
2. Pre-set values based upon input value (e.g., set Ability One Flag based upon part number and CAGE)
3. Control core MDM functionality (e.g., Item Export Configuration)

To manage the lookup tables, browse to the main landing page and select the “Product Manager” from the toolbar menu, then select “Lookup Tables”, then select “Lookup Table Console”



This will bring up the Lookup Table Console on the right hand side of the User Interface. To manage a specific

QUICK START GUIDE: SUPPLIER ACCOUNT MANAGEMENT IN MDM

lookup table, select the “Action” icon to the far right hand side of the lookup table you want to manage.



Select	Name	Type	Spec	Version	Action
<input checked="" type="radio"/>	Ability One Authorized Distributor Lookup Table	Single String Key	Ability One Authorized Distributor Spec	Latest Version	
<input type="radio"/>	Ability One Authorized NSN Lookup Table	Single String Key	Ability One Authorized NSN Spec	Latest Version	
<input type="radio"/>	Acquisition Advice Code Lookup Table	Single String Key	Acquisition Advice Code Spec	Latest Version	

This will display the selected lookup table within the Lookup Table console. From this view, you can modify existing values by double clicking the cell of the record you wish to modify. Alternatively you can select to Add a new record by clicking the “Add” button or delete an existing record by clicking the “Delete button” while selecting the rows you wish to delete.

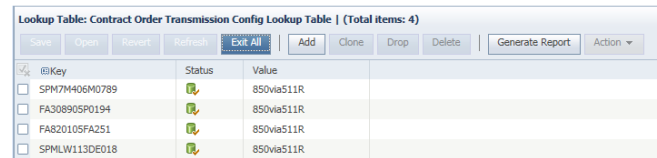
Managing DLA Contracts for FedMall

DLA Contracts for FedMall refers to those contracts written by the DLA Philadelphia contracting office specifically for FedMall to enable Customers to purchase Commercial Supplier items using Interfund Billing Procedures (i.e., ‘Pay by MILSTRIP’). Unlike orders to other Commercial Suppliers, these orders do NOT flow directly to the Supplier via FedMall but instead are sent to DAAS via DLMS 511R then to EBS. EBS then generates EDI 850 transactions to the Supplier. To ensure all orders for these contracts flow through DAAS as a DLMS 511R, MDM maintains a list of contract numbers for the DLA Contracts for FedMall as a lookup table. If a new contract is awarded by DLA Philadelphia, then this lookup table must be updated to include the new contract number prior to the Supplier registering in the Supplier Portal.

To access this table use the instructions contained in the previous section, but select ‘Contract Order Transmission Config Lookup Table’.

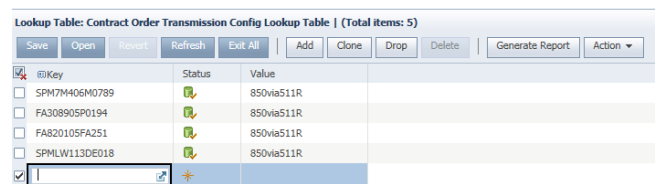
<input type="radio"/>	Class of Supply Code Lookup Table	Single String Key
<input checked="" type="radio"/>	Contract Order Transmission Config Lookup Table	Single String Key
<input type="radio"/>	Controlled Inventory Item Code	

This will display the following table:



@Key	Status	Value
<input type="checkbox"/> SPM7M406M0789		850via511R
<input type="checkbox"/> FA308905P0194		850via511R
<input type="checkbox"/> FA820105FA251		850via511R
<input type="checkbox"/> SPMLW113DE018		850via511R

To add a contract to this list select the “Add” button which will create a new row at the bottom of the table.



@Key	Status	Value
<input type="checkbox"/> SPM7M406M0789		850via511R
<input type="checkbox"/> FA308905P0194		850via511R
<input type="checkbox"/> FA820105FA251		850via511R
<input type="checkbox"/> SPMLW113DE018		850via511R
<input checked="" type="checkbox"/>		

Enter the new contract number under the “Key” column and set the “Value” attribute to “850via511R”. After updating select the “Save” button to save the updates.