General Services Administration
Vendor Customer Self Service (VCSS)
Pegasys 7.8 User Guide (Basic Navigation and Registration)
Table of Contents

Table of Contents ..............................................................................................................................................1
Introduction..........................................................................................................................................................2
  1.1 General Information .................................................................................................................................2
  1.2 System Description ...................................................................................................................................2
2  Getting Started ...............................................................................................................................................3
  2.1 Accessing VCSS ........................................................................................................................................3
    2.1.1 Logging into VCSS ............................................................................................................................3
    2.1.2 Notices ..............................................................................................................................................4
    2.1.3 Forgotten Password ............................................................................................................................5
  2.2 Navigation ..................................................................................................................................................9
    2.2.1 Top Right Navigation ........................................................................................................................9
    2.2.2 Left Navigation Bar ...........................................................................................................................9
    2.2.3 Menus ...............................................................................................................................................10
    2.2.4 Breadcrumbs ......................................................................................................................................11
  2.3 User Roles ................................................................................................................................................11
  2.4 Other Useful Tips .....................................................................................................................................12
    2.4.1 Date Selection Feature .......................................................................................................................12
    2.4.2 Favorites ..........................................................................................................................................14
    2.4.3 Bookmarks .......................................................................................................................................16
    2.4.4 Searching .........................................................................................................................................20
    2.4.5 Search Results Item Collections .........................................................................................................20
  2.5 Session Timeout .........................................................................................................................................28
3  Vendor and Customer Registration and Maintenance ..................................................................................29
  3.1 Registrant Information ..............................................................................................................................29
    3.1.1 Step 1 - Registration Code ..................................................................................................................29
    3.1.2 E-Mail Notifications ...........................................................................................................................30
Introduction

1.1 General Information

This User Guide Document documents the user guide for actions performed in the Vendor and Customer Self-Service (VCSS) v7.8 application to facilitate the integration between VCSS and Pegasys. This document references the VCSS application using GSA-specific information. GSA has opted to disable the procurement functionality in the VCSS application.

1.2 System Description

The Vendor and Customer Self-Service application facilitates electronic invoicing activities and allows the GSA’s vendors and customers to track the status of electronic invoices and the payments referencing those invoices. VCSS allows vendors the ability to view current orders and payments and to submit real-time electronic invoices to GSA. VCSS facilitates electronic invoices through Web Methods integration to GSA’s Pegasys financial system. VCSS provides a method for vendors and customers to view and respond to various business opportunities (i.e., Vendor Invoicing and Customer Billing Statement retrieval) with real-time interaction. CGI has created this user guide to assist vendors. However, there are some basic functions within this guide that apply to both vendors and customers and will be referenced as such.

Overview

VCSS allows GSA to complete invoicing activities with vendors electronically. This document is separated into six sections: Getting Started, Vendor Registration and Maintenance, Award/Order, Invoices, Payments, and Correspondence.

- **Getting Started**: Addresses navigational and basic functions including logging into VCSS, navigational tools, user roles, and other useful tips.
- **Vendor Registration and Maintenance**: Addresses registering as a vendor.
- **Award/Order**: Addresses searching for an award or order for a particular vendor. The Award/Order section also is where the creation of a Referenced Invoice will begin.
- **Invoices**: Address creating a referenced invoice, submitting an invoice to GSA, and searching and viewing invoices. The invoice section will also address withdrawing an invoice and resubmitting a rejected invoice.
- **Payments**: Address searching and viewing payments created for accepted invoices.
- **Correspondence**: Addresses how to send correspondence messages to Pegasys from VCSS.

- **Customer Related Items**: For details and information regarding customer transactions in VCSS, please reference the Billings and Accounts Receivable (BAAR) User Guide 8, Section 5, Vendor and Customer Self Service.
2 Getting Started

This section details various topics that users need to know to use VCSS effectively. Specifically, this section details access to VCSS, navigation around various areas of VCSS, different types of VCSS users, and other useful tips.

2.1 Accessing VCSS

2.1.1 Logging into VCSS

Access to certain invoicing functionality in VCSS requires the user to login to VCSS. A user must be associated with a registered vendor in order to create invoices and view invoices and payment. The VCSS Registration Website can be located at https://vcss.ocfo.gsa.gov/.

To login to VCSS:

1. There are different paths to access the VCSS Home page. Once acquired, terms and conditions of accessing VCSS will be displayed. Read this information, then select [Accept & Continue] to continue.

   ![Figure 1: VCSS Home Page](image)

2. A list of Public System Notices will be displayed. Review the list before logging in.

   ![Figure 2: Not Logged-in Home Page](image)

3. Select the [Login] option from the drop down menu in the upper-right corner.
4. Enter the [User ID] and [Password].

5. Select the [Sign In] button.

2.1.2 Notices

1. After logging in, the VCSS “Home” page will be displayed. This page varies for each user depending on which page they set as their home page. The View Notices is currently displayed. Please review the VCSS notices, and then select [Continue].
2.1.3 Forgotten Password

If a user forgets their password to access VCSS, the user may request a new password by contacting the GSA's Business Service Application Desk via email at businessapps@gsa.gov.

Another option for the user is to follow these steps to reset their own password:

1. Navigate to the VCSS sign in page.

   **Figure 6: Forgot Password Link**

   ![VCSS Identity Provider](image)

   - **User ID**: 
   - **Password**: 
   - **Forgot Password**

2. Select the **Forgot Password** link.
3. Enter your User ID on the User ID page.

4. On the New page displayed, enter in your User ID, Email Address, and the answers to your two security questions.

5. Select the **Submit** button.

6. A message will appear stating, “The password reset link has been sent via email”.
7. Navigate to your email and open the CoreIdp Reset email.
8. Select the One-Time access link.

**Figure 10: CoreIdp Email**

EXTERNAL SENDER: Do not click any links or open any attachments unless you trust the sender and know the content is safe.

One-time access link: [https://cfctest8-vss.phdc-test.gsa.gov:443/authservice/PasswordReset.jsp?id=651d7387-3ca5-4105-9128-c02157f815dc](https://cfctest8-vss.phdc-test.gsa.gov:443/authservice/PasswordReset.jsp?id=651d7387-3ca5-4105-9128-c02157f815dc)

9. Select the external link and open the new VCSS sign in page.
10. Enter your User Id and select the **Next** button.
11. On the next page, enter your Email Address, New Password, and your new password again under Confirm Password.

12. Select the **Submit** button.

13. You will receive a second email stating the password for user id associated with this email address has been changed.

14. Navigate back to the sign in page and attempt to sign in with your User ID and New Password.

15. The VCSS Home page should be displayed after a successful sign in.
2.2 Navigation

This section details various ways that a user can navigate around VCSS.

2.2.1 Top Right Navigation

Throughout VCSS, the user may access various areas using the top right navigation. The top right navigation for a VCSS non-registered user includes the following:

- **Support**: Opens the VCSS Help external page.
- **About**: Opens the About VSSX application window.
- **Contact Us**: Directs the user to the VCSS Contact page.
- **Public Notices**: Returns the user to the VCSS Public System Notices page.
- **Site Map**: Exchanges the available VCSS Navigation options to the Site Map view. Please note this is a View Only page and none of the links are active.

The top right navigation for a user logged into VCSS includes the following:

- **Support**: Directs the user to the VCSS Online Help page.
- **Contact Us**: Directs the user to the VCSS Contact page.
- **Settings**: Opens a menu that allows the user to configure application settings.
- **Notices**: Takes the user to the VCSS View Notices page.
- **Public Notices**: Returns the user to the VCSS Public Notices Page.
- **Site Map**: Exchanges the VCSS Home Page menu options to the Site Map view.
- **Account Maintenance**: Allows the user to configure application settings, bookmarks, user information, and security questions and answers.
- **About**: Opens the About VSSX window.
- **Add Start Page**: Allows the user to configure the page they are on to be their starting page when they sign in.
- **Sign Out**: Signs the users out of the VCSS session.

2.2.2 Left Navigation Bar

In VCSS, various navigational options appear on the left side of the page.

The menu options on the left navigation bar are listed below in the order of their icon picture in Figure 13:

- **Accounts**: Allows the user to perform Account or Business Line Summary searches.
- **Statements**: Allows the user to View and Print Statements, search for statements by agreements, Dispute statements, and view Dispute Requests.
• **Payments:** Allows the user to view Customer Payments and Refunds.

• **Electronic Invoicing:** Allows the user to perform an Order search, create and search Invoices, and Vendor Payment searches.

• **Account:** Allows the User to access the New Registration page.

• **Correspondence:** Allows the user to view and create Account and Statement Correspondence.

• **Utilities:** Allows the User to access external applications.

**Figure 13: Left Navigation Bar**

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### 2.2.3 Menus

Within each navigation icon, the user has access to additional specific areas of VCSS by using the menus. Menus contain options based on the user role and access rights.

For example, the menu options for a vendor user that has a role to invoice for the vendor would have menu options under Electronic Invoicing like the following:

- **Order Search:** Directs the user to the Award/Order Search page.
- **Invoice Search:** Directs the user to the Invoice Search page.
- **Create Referenced Invoice:** Directs the user to the Award/Order Search Page.
- **Vendor Payment Search:** Directs the user to the Vendor Payment Search page.
2.2.4 Breadcrumbs

On various pages throughout VCSS, a Breadcrumb trail is available at the top of the page for navigation purposes. This Breadcrumb trail includes hyperlinks that represent each of the pages the user navigated through to get to the current page. The user may select any of the hyperlinks to return to a previous page. An example of a Breadcrumb is VCSS → Electronic Invoicing → Award/Order Search as shown below.

2.3 User Roles

VCSS includes various user roles that determine the user’s access rights throughout the system. The VCSS IT Security Desk selects the role when a new VCSS user is created. This section describes the VCSS Non-Registered and Registered User.

VCSS includes the following roles:

- **Account Administrator**: The responsibility of the Account Administrator is to approve or disapprove requests to add additional users to their specific account information via email. The person initiating the New Registration Request is assigned as the Account Administrator for that account. Once the account is established in VCSS, any additional
user requesting access to that account must be approved by the Account Administrator and forwarded to VCSS Security for VCSS access processing.

- **Vendor Role:** This role is given to Vendors that sell products to GSA. Being in VCSS allows a vendor to create and process real-time invoices electronically and track the status of payments made by GSA.

- **Customer Role:** This role is given to Customers that work with GSA. A customer utilizing VCSS will have the capability to view their billing and payment information. You can also manage your accounts, review account history and submit correspondence.

- **Utility Role:** This role is given to specific vendors that submit utility invoices to VCSS.

### 2.4 Other Useful Tips

#### 2.4.1 Date Selection Feature

The Date Selection Feature for date entry is explained below.

**To use the Date Selection feature:**

1. Select the Calendar Icon hyperlink in the From Date field. The Calendar displays with the current date highlighted.

   ![Figure 16: Calendar window Month](image)

2. Select the appropriate date required. The From date will be displayed.

   ![Figure 17: From Date](image)

3. Select the To Date Calendar Icon and select the appropriate To Date from the Calendar Window. The date you selected will be displayed in the Date fields.
The Calendar window can be altered to show the days within the month, the months within the year, the year within a range of 10 years, and the year within a range of 100 years.

**Calendar Icon Actions:**

a. `<`: Directs the user to the previous month or year.

b. `>`: Directs the user to the next month or year.

c. Selecting the Month (i.e., March 2021) displays the months within the year.

d. Selecting Year (i.e., 2021) displays the year within the range of 10 years (2020-2029)

e. Selecting the Years (i.e., 2020-2029) displays the year within the range of 90 years (2000-2090)
Figure 21: Calendar Window 100 year range

2.4.2 Favorites

The VCSS Favorites functionality assists the user by storing commonly used selections for data fields frequently entered. For example, if a specific vendor number needs to be entered for each processing action created then that specific vendor number could be created as a Favorite in the Vendor Number field (if available as an option) of the processing action. The vendor number would be listed in a drop down list of "Favorites" and selected rather than being typed in manually or searched for.

To add and select the initial favorite:

1. In the Account Summary page, select the Favorites icon (★) beside the Account hyperlink.

Figure 22: Favorites Icon

Account Summary

2. The Favorites window expands.
3. Select the **Search** button.

4. On the next page, search for a Vendor.

**Figure 23: Favorites Window**

No favorites found

| Search |

---

5. Select the **Favorites Icon** next to the **Select** button of the search result, and select the **Select** button.

6. Back on the Account Summary page, select the Favorites icon next to the Account hyperlink again. This time the favorite you selected previously will display.

**Figure 24: Favorites Search**

**Figure 25: Favorites Window**
7. Select the **checkmark** hyperlink beside the value displayed. The Favorites window closes and the selected value displays in the data field.

**To delete a favorite:**

1. Select the Favorites star (⭐) to open the Favorite window and select the Delete icon (🗑) next to the data value to be deleted. The Favorite window closes and the value is deleted from the Favorites list.

**Figure 26: Favorites Window – Delete Icon**

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2.4.3 **Bookmarks**

Bookmarks can be used to bookmark specific pages in VCSS by a user. To enable Bookmarks, a user must first navigate to a page and select the Bookmarks Icon. The Bookmarks functionality is further explained and displayed below.

1. On the Award/Order Search page, select the Bookmark Icon next to the Breadcrumb ending in Award/Order Search. This enables the Bookmark and displays it in the top right corner of the window.

**Figure 27: Bookmark Icon**

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**Award/Order Search**

2. Two System Messages will display detailed below, after selecting the Bookmark Icon on the page the Bookmark Icon will be highlighted in red.

   a. “A bookmark to Award/Order Search has been added.

   b. “Action was successful.
3. After the Bookmark has been added, the user can select the Bookmark Icon on the top right of the page to manage the Bookmarks.

**Figure 29: Manage Bookmarks Window**

4. Select the Bookmark Icon. The Bookmark window is displayed.

5. Select Organize Bookmarks. This navigates the user to the Bookmarks page where the Bookmark is labeled and the user can relabel, rank, or delete the Bookmark.
To Rank or Relabel a Bookmark:

1. Select the Rank field and enter in a new rank for the Bookmark (i.e., “1”).

   Figure 31: Bookmark Rank

2. Select the Label field and relabel the bookmark (i.e., “Order Page”).

   Figure 32: Label Bookmark

3. Select the Save button. The Bookmark will be relabeled (i.e., Order Page) and a System Message will display indicating the “Action was successful”.
To Delete a Bookmark:

1. Select the Bookmark.
2. Select the Delete button. This deletes the Bookmark and crosses out the Rank and Label.

A System Message will display indicating the “Action was Successful”.
2.4.4 Searching

Searching to locate a specific item or items can be performed in many of the areas of VCSS. The following options apply to all searches when using VCSS.

- The asterisk (*) functions as the wildcard for searching a data field in VCSS. If no search criteria or only asterisks are used for a particular search field, the search will return all possible results. Examples using characters and wildcards as search criteria are:
  - Order Number - SP0710*: Search returns all documents where the document number starts with ‘SP0710’.
  - Order Number - *0001: Search returns all documents where the document number ends with ‘0001’.
  - Users can enter multiple wildcards in the search criteria.
    - Order Number – GP*01*: The search will return any order numbers that start with GP and contain 01 between GP and the ending of the document number.

- Searches in VCSS are not case-sensitive. Therefore, search criteria of ‘sp0710*’ and ‘SP0710*’ entered for the document number will return the same set of documents.

- The site configures the maximum number of search results returned (999) for performance purposes. If the search returns more results than the maximum number, the user receives a message to narrow the search.

2.4.5 Search Results Item Collections

After performing a search, a table, referred to as an item collection, is populated with the search results. Column headings for search results in VCSS can be rearranged, expanded, and contracted as desired while on that search screen. The Item Collections table results can be Sorted by
selecting a column or using the Sort Icon, as well as Exported, Maximized, and Restored to its original size.

**Use the following steps to rearrange column headings:**

1. Select the column heading and drag it to the desired location.

**Figure 37: VCSS Search Results**

<table>
<thead>
<tr>
<th>Document Number</th>
<th>Account Code</th>
<th>Solicitation Number</th>
<th>DUNS+4 / BPIN+4</th>
<th>Account Name</th>
<th>Amount</th>
<th>Effective Date</th>
<th>Type</th>
<th>Document Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Totals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Use the following steps to expand or contract column widths:**

1. Select the column heading dividing line to the right of the desired column and when the icon shown below appears, drag it to the right to expand the column width. Drag the icon to the left to contract the column width.

**Figure 38: Adjusting Column Width**

**Use the following steps to Sort results by selecting a column:**

1. After you perform a search and the results are displayed, select the Amount column to sort the Orders by their amounts starting with the smallest amount.

**Figure 39: Smallest Amount Column Sort**

2. Select the Amount column again to sort the Orders by the largest amounts.
Use the following steps to perform a Sort using the Sort Icon for an Item Collections table:

1. To Sort the Item Collections table by using the Sort Icon, first select the Sort Icon.

2. Select the Primary Sort dropdown option of Amount.

3. Select the arrow pointing up or down depending on how you would like the results to be sorted.

   NOTE: The arrows dictate if the results (i.e., by Amount) are sorted by largest (Up) or smallest (down).
4. Select the Secondary Sort dropdown to display results (i.e., by Effective Date) in order following the Primary Sort.

5. Select the Tertiary Sort dropdown to display results (i.e., Account Name) as the third order following the Primary and Secondary Sorts.
6. Select the **Sort** button. The results displayed are sorted by the options you selected.

**Figure 45: Sort Item Collections Table**

Use the following steps to Export the Item Collections table:

1. Select the **Export** Icon found on the top right of the Item Collections table. This will open the Export window.

**Figure 46: Export Icon**
2. The user has the option to select “View in CSV” or “View in Excel”.

3. Select “View in CSV”. The table will download and appear on the bottom left corner of the browser. From there the user can open this as an Excel file.

   **NOTE:** Both options downloads the Item Collections table as an Excel spreadsheet. “View in Excel” downloads the results as a protected view XSL Excel file, where as “View in CSV” downloads as a CSV editable Excel file.

**Figure 47: Export Window**

**Figure 48: View in CSV Download**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>PJ</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>PJ012621222120</strong></td>
<td>PJ012621222120-PJ</td>
</tr>
<tr>
<td></td>
<td><strong>PJ020121230414</strong></td>
<td>PJ020121230414-PJ</td>
</tr>
<tr>
<td></td>
<td><strong>PJ020321220600</strong></td>
<td>PJ020321220600-PJ</td>
</tr>
<tr>
<td></td>
<td><strong>PJ020821225728</strong></td>
<td>PJ020821225728-PJ</td>
</tr>
</tbody>
</table>

AwardOrderQuery....csv
Use the following steps to Maximize the Item Collections table:

1. Select the **Maximize** Icon on the Top right of the Item Collections table. The table will expand and allow you to view the results with a full view of the table.
Use the following steps to Restore the size of the Item Collections table:

1. To view the table in a more condensed manner, select the **Restore Icon**.

![Figure 52: Restored Table Size](image)

Use the following steps to show more results on the Item Collections table:

1. To view more results on the Item Collections table, select the right arrow to go to the next page.

**NOTE:** The user can select the right arrow or the double stacked right arrow to navigate to the very last page available.
2. To view more results on each page of the Item Collections table, select the dropdown option and select your desired per page option (i.e., All).

2.5 Session Timeout

When the user logs into VCSS, a VCSS session starts. If the session remains inactive for more than fifteen minutes (i.e., the user does not interact with VCSS), the session is terminated. If desired, the user may access VCSS to login again. If the session is terminated prior to any saving action, all work in VCSS is lost and the user would have to re-perform work after logging back in.
3 Vendor and Customer Registration and Maintenance

3.1 Registrant Information

This section provides instructions for completing the Registration process in VCSS.

3.1.1 Step 1 - Registration Code

Completion of Registration Process:

1. The requestor will receive an email from the VCSS Registration Desk with a single use PIN and detailed instructions on how to complete the registration process.
2. From the left side menu on the VCSS Home page, select Account → New Registration.

**Figure 55: New Registration Link**

![New Registration Link](image)

**Figure 56: Step 1 of Registration Wizard**

![Step 1 of Registration Wizard](image)

3. Enter the email address and PIN in the Registration Information section.
4. Select the [Next] button to continue to Step 2 of the Registration Wizard. Step 2 of the Registration Wizard displays.
Step 2 of the Registration Wizard allows the requestor to set up user information.

**Figure 57: Step 2 of Registration Wizard**

5. If the requestor is an existing user, select the ‘I am an existing user’ radio button and enter the existing **User ID** and **Password** in the Existing User Information box.

6. If the requestor is a new user, enter the new user information in the New User Information section. The User ID should be a compilation of the user’s first and last name. For Example, Joe Wonder would have the user id of joewonder.
   a. Select **[Finish]**.

7. If the requestor is a new user, once the registration has been approved, an email will be sent to the email address associated with the registration.

8. Review the requestor information and select **[Submit]**. The requestor will receive a system-generated message indicating that the registration in VCSS is complete.

**Figure 58: Registration Confirmation**

### 3.1.2 E-Mail Notifications

- Registration requests are submitted through the VCSS Web Portal to GSA’s Registration Desk for processing. VCSS verifies registration submission to the registrant via an email with a confirmation number beginning with “VR”.

- The VCSS Registration Desk receives the registration request, processes the necessary requirements and emails the registrant with a unique PIN number and instructions to continue the registration process. If there is an issue with processing, the Registration Desk will contact the registrant for details.

- Once the registrant successfully submits the PIN number and contact information in VCSS as instructed, a notification is generated to the GSA VCSS IT Security Desk identifying a new VCSS user to be processed. After completing a security protocol, VCSS Security will notify the registrant their access to VCSS has been approved. If the user is new to VCSS, they will receive their User ID and a temporary password in two separate emails. If this is an additional account added to the registrant’s current User ID,
they will receive one email notifying them the account has been added and is now active to use.