



Managing User Roles on a Vendor Portal Account

To successfully transact in the Statewide Financial System (SFS), it is important to **first** refer to the related SFS Handbook. Job aids should be referred to as quick reminders on how to process transactions. SFS Handbooks provide more context and include screenshots.

Job Aid Number	JAA-VEN101-003
Purpose	This quick guide describes the steps to delegate additional user roles needed to access a NYS Vendor Record.
User Role	SFS VENDOR DELEGATED ADMINISTRATOR
Date Modified	12/20/2023
Related SFS Handbook	SFS Training for Vendors

Concept

Upon becoming a registered New York State Vendor, the Primary Contact is the person who will receive the Vendor Registration Welcome packet and may serve as the SFS Vendor Delegated Administrator (**Delegated Admin**) for the SFS account.

Roles in the SFS Vendor Portal control what an individual has access to do and the tasks they can perform.

The **Delegated Admin** user role is responsible for making account changes, designating roles for other user IDs within their organization, and managing address and contact information.

Specifically, the **Delegated Admin** adds the new user, creates the unique login credentials, designates roles for the applicable vendor, and must send the new user the URL Link, assigned user ID, and password information.

There are multiple types of user roles that can access the Vendor Self-Service Portal. For basic access to the SFS Vendor Portal homepage, all vendor users must be assigned the **Base Access** role and the **Login Access** role in SFS, in addition to other roles based on the tasks an individual performs.

Staff involved in more than one aspect of a business process (e.g. creating invoices, submitting prequalification applications, signing grant contracts, etc.) will have multiple roles assigned to a single user ID in SFS.



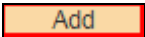


For additional information regarding which roles are required based on the type of work the user is involved in, please refer to the SFS **Vendor Portal Access Reference Guide**.

https://upk.sfs.ny.gov/UPK/VEN101/FILES/SFS_Vendor_Portal_Access_Reference_Guide.pdf

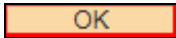
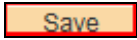
Predecessor(s)	
Transactions that should occur before this task.	
Logging Into Vendor Self-Service as the Primary Contact – Designating Delegated Administrators	See Job Aid: JAA-VEN101-001

Successor(s)	
Transactions that should occur after this task.	
N/A	

Procedure

Step	Action
1.	From My Homepage , navigate to: View Your Information > Maintain Users. Alternative Navigation: From the NavBar , navigate to: Menu > Maintain Supplier Information > Manage User Profiles.
2.	Click the Add a New User ID tab. 
3.	Note: The System will not allow duplicate User ID's . If a unique User ID already exists, you will need to create a different User ID .
4.	Enter the applicable value into the User ID field. 
5.	Click the Add button to create the new user profile. 
6.	Enter the user's name into the Description field. 
7.	Note: Account Locked Out? is selected only when the Delegated Admin wants to disable user access to the system.
8.	Enter a unique password the user will use to login for the first time into the Operator Password (Encrypted) field. This password must be eight characters in length. This password must include one special character and one digit.
9.	Enter the applicable value into the Operator Password (Encrypted) field. 

Step	Action
10.	Confirm the password created in the Confirm Password field. <div style="border: 1px solid red; padding: 2px;">Confirm Password <input style="width: 200px;" type="password"/></div>
11.	Note: The user credentials will not be automatically sent to the end user; you will be responsible for giving that user their username and password directly.
12.	Enter the email address of the new user into the E-mail Address field. <div style="border: 1px solid red; padding: 2px;">E-mail Address <input style="width: 200px;" type="text"/></div>
13.	Although there are additional currency code options to select from, New York State only makes payments in USD (United States Dollars).
14.	Currency Code: Leave the default as 'USD'. <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Currency Code <input style="width: 40px;" type="text" value="USD"/> <input type="button" value="Q"/></div>
15.	Rate Type: Leave the default as Current Rate Rate Type <input style="width: 100px;" type="text" value="Current Rate"/> Note: Current Rate is the only acceptable value for the Rate Type field.
16.	Click the Add a User Role button. <div style="border: 1px solid orange; padding: 2px; display: inline-block; background-color: #f9f9f9;">Add a User Role</div>
17.	The Base Access and Login Access roles will already be selected. These are required. Please be sure to select additional roles required for the user based on the tasks the individual performs.
18.	You can assign additional roles to the user, based on the tasks an individual performs. Staff involved in more than one aspect of a business process (e.g., creating invoices, submitting prequalification applications, signing grant contracts, etc.) will have multiple roles assigned to a single User ID in SFS. For additional information regarding which roles are required based on the type of work the user is involved in, please refer to the SFS Vendor Portal Access Reference Guide , https://upk.sfs.ny.gov/UPK/VEN101/FILES/SFS_Vendor_Portal_Access_Reference_Guide.pdf available in SFS Coach.
19.	Click the checkbox(es) associated with the applicable role(s). <input type="checkbox"/>
20.	Click the OK button. <div style="border: 1px solid orange; padding: 2px; display: inline-block; background-color: #f9f9f9;">OK</div>
21.	Click the Add a Supplier button. <div style="border: 1px solid orange; padding: 2px; display: inline-block; background-color: #f9f9f9;">Add a Supplier</div>

Step	Action
22.	<p>Use the Select a Supplier page to select which vendors the new user will be associated with.</p> <p>If the role is being created for a Delegated Admin who oversees multiple vendors, you can select which (multiple) vendor(s) to associate with the new user.</p>
23.	<p>Click the applicable supplier box.</p> <p><input type="checkbox"/></p>
24.	<p>Click the OK button.</p> <p style="text-align: center;"></p>
25.	<p>Click the Save button.</p> <p style="text-align: center;"></p>
26.	End of Procedure.