



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-VEN101-031
Purpose	This quick guide provides the required steps to delegate additional roles to a guest user's profile in the SFS Vendor Portal.
User Role	SFS VENDOR DELEGATED ADMIN
Date Modified	12/15/2023
Related SFS Handbook	SFS Training for Vendors

Concept

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.


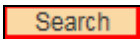
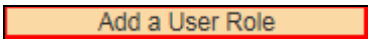

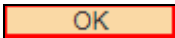
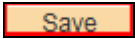
Note:

- The delegating of the **Base Access** and **Login Access** roles to a guest user's profile is covered in the JAA-VEN101-003 Delegate Additional Guest User Roles to Access a NYS Vendor Record job aid.
- Only the vendor's Delegated Admin can assign roles to a user.

Predecessor(s)	
Transactions that should occur before this task.	
JAA-VEN101-003	Add an Additional Guest User with Roles to Access a NYS Vendor Record

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.	Enter the applicable value into the User ID begins with field. 
3.	Click the Search button. 
4.	The user's User ID , title Description and E-mail Address are displayed under the Logon Information section on the Setup User page. Note: To disable a user, you can click the Account Locked Out? checkbox. In this example, we will not disable a user's account.
5.	Click the Add a User Role button to add roles for the user. 
6.	The Select Roles page displays additional roles that can be assigned. 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 , available in SFS Coach.
7.	Click the checkbox(es) associated with the applicable role(s). 
8.	Click the OK button. 
9.	The selected role(s) have been added to the user's profile.
10.	Click the Save button. 
11.	End of Procedure.