

New York State VendRep System

**Business Entity Quick Reference Guide:
Enrollment & User Management for Business Authorizers**
<https://portal.osc.state.ny.us>



ENROLLMENT & USER MANAGEMENT

To access the New York State VendRep System, a Business Entity must establish an account by enrolling in the Office of the State Comptroller's (OSC) Online Services. Two roles are available to users in OSC Online Services: the Primary Authorizer and Authorizer. Both are administrative roles responsible for managing user accounts.

The Primary Authorizer enrolls the Business Entity, creates Authorizer accounts or VendRep System user accounts and resets passwords.

An Authorizer can create other Authorizer accounts, create VendRep System user accounts and reset passwords.

IMPORTANT POST ENROLLMENT STEP

Once fully enrolled, a Business Entity must complete and certify an online questionnaire to be visible to State Contracting Entity users.

Log in to the VendRep System, complete Basic Vendor Data and start a Questionnaire. Complete all sections and certify. Once these steps are complete, the Questionnaire and entity information will be available to authorized State Contracting Entity users enrolled in the System.

ENROLLING A BUSINESS ENTITY

Note: To enroll, the Business Entity's legal name and New York State Vendor Identification Number are required.

1. Go to <https://portal.osc.state.ny.us>
2. **Click** "Enroll Now"
3. Select "Business" then "Start Enrollment"

STEPS TO ENROLL

Step 1 – Terms of Service

- Read and agree to the Terms of Service by checking the box, **click** "Next"

Step 2 – Vendor Identification

- Enter New York State Vendor ID and Legal Business Name, **click** "Next"

Step 3 – Vendor Information Confirmation

- Review the information, **click** "Next," if correct

Step 4 – Primary Authorizer Account Creation

- Enter required information
- Create a User ID
- Provide secret answers to security questions to allow you to set your password
- Indicate if you have the authority to act on behalf of this Business Entity for the New York State OSC Online Services account.

Step 5 – Primary Authorizer – Roles Assignment

- Assign VendRep System roles, if applicable

Step 6 – Primary Authorizer – Information Confirmation

- Review information, **click** "Finish," if correct
- Enrollment Successful – User will receive two emails from OSC, one containing their User ID and one containing a temporary password and link to log into OSC Online Services
- To create a password, the Primary Authorizer needs:
 - User ID
 - Temporary Password - After providing secret answers to security questions, the user will set their own password
 - First and Last Name, as originally entered

After creating a password, the Primary Authorizer can log in to create additional user accounts.

OTHER ENROLLMENT FUNCTIONS

CREATE NEW USER

1. From the “User Management” page, **click** the link in the “Add User” box
2. Complete all asterisked fields, ensure that each email address is correct for the user to receive emails with instructions for completing enrollment
3. **Click** “Save and Assign Roles” or “Save with no Roles”
4. **Click** checkbox to assign roles (Roles selected will be highlighted)
5. Add roles; each user must be assigned at least one role in order to access the VendRep System

Note: The new user will receive two emails from the Office of the State Comptroller with instructions for completing enrollment. The user account will not be activated until the new user logs in and creates a password.

CREATE AN AUTHORIZER

1. From the “User Management” page, **click** link in the “Add User” box
2. Complete all asterisked fields, **click** “Save and Assign Roles” or “Save with no Roles”
3. Select “Business Authorizer” under Enrollment
4. **Click** checkbox to assign roles (Roles selected with be highlighted)

SEARCH FOR A SPECIFIC USER

1. From the “User Management” page, **click** “View Users”

MODIFY USER INFORMATION

1. From the “User Management” page, **click** the link next to the specific user record to modify
2. **Click** “User Info” to edit personal information
3. **Click** “Permissions” to edit roles

ADD OR REMOVE USER ROLES

1. Locate the user from the user list from the “User Management” page
2. **Click** “Permissions” to access the user’s information
3. To add a role, select desired application and **click** the checkbox next to the role to be added (the role will then become highlighted)
4. To remove a role, uncheck the box next to the role to be removed (the role will no longer be highlighted)

RESET USER PASSWORD

1. From the “User Management” page, **click** the “User Information” link next to the specific user record
2. At the bottom of the page, **click** “Reset Password” - the user whose password is reset will receive an email with instructions to create a new password

LOCK A USER ACCOUNT

Note: An account (user) cannot be deleted; it can only be locked.

1. From the “User Management” page, locate the user from the enrolled user list
2. **Click** “User Information” next to person’s name
3. **Click** “Lock User” from the list

RESET A LOCKED USER ACCOUNT

1. From the “User Management” page, locate the user from the enrolled user list
2. **Click** “User Information” next to person’s name
3. **Click** “Unlock User”

VENDOR RESPONSIBILITY INFORMATION

<http://www.osc.state.ny.us/vendrep>

HELP DESK

ciohelpdesk@osc.state.ny.us

866-370-4OSC (4672)

518-408-4OSC (4672)

ACCESS THE VENDREP SYSTEM

<https://portal.osc.state.ny.us>