SFS Vendor Role Guide

Security Role Name	Security Role Name Description	Access Provided	Type of Users
NY_ES_SUPPLIER_ADMIN	Delegated Admin	The SFS Vendor Delegated Admin role is assigned to the vendor Primary Contact identified on the Substitute W-9 at the point of registration. This role allows the vendor user to setup user IDs and manage system access for additional individuals from their organization who should have access to the SFS Vendor Portal. In addition, the role can add, change, and delete address and contact information for the vendor. This role is also able to view financial information for the vendor.	Central Office Only
NY_ES_SUPPLIER_GUEST	Login Access	The SFS Vendor Login Access role is required for all vendor users and allows the user to complete the registration process. This role has the ability to add, change, and delete address information. This role will also give the ability to add contact information.	All Users (Role Assigned Automatically).
NY_ES_SUPPLIER_USER	Base Access	The SFS Vendor Base Access role is required for all vendor users and allows the user to log into the SFS Vendor Portal. This role also provides the ability to view messages displayed on the Homepage of the SFS Vendor Portal.	All Users (Role Assigned Automatically).
NY_ES_CREDIT_CARD_VW	Procurement Card Inquiry	The Procurement Card Inquiry role allows the vendor user to view an agency's procurement card (PCard) information, including the credit card number and expiration date, in order to process payment. This role should be given only to those who need it. This role will also provide view-only access to purchase orders and receipts.	Central Office Finance Department
NY_EM_SUPPLIER_INQ	Vendor Inquiry	The Vendor Inquiry role allows the vendor user to review vouchers and payments in SFS. This role also allows the vendor user to view purchase orders and receipts.	SPS Staff and Central Office Only. Read only.
NY_EM_SS_INVOICE	Invoice Processor	The Invoice Processor role allows the vendor user to create, view, and delete invoices in SFS. This role will also provide the ability to review vouchers, payments, purchase orders, and receipts.	Accounts Receivable Staff
NY_GM_VENDOR_PREQUAL	Prequalification Processor	The Prequalification Processor role allows the vendor user to apply for, and review existing, prequalification applications associated with their NYS vendor ID.	Central Office Only
NY_GM_VENDOR_EVENT_INITIATE	Bid Response Initiator	The Bid Response Initiator role allows the vendor user to initiate a bid response to a bid event but not submit the bid response to the agency.	Principal Investigators/Program Staff Proposal Specialists Contract & Grant Specialists
NY_GM_VENDOR_EVENT_INQUIRY	Bid Event Inquiry	The Bid Event Inquiry role allows a vendor user the ability to review bid events. This is a view-only role.	All Users
NY_GM_VENDOR_EVENT_SUBMIT	Bid Response Submitter	The Bid Response Submitter role allows a vendor user to both initiate a bid response and submit a bid response to the agency.	Proposal Specialists Contract & Grants Specialists
NY_ES_VNDR_CNTRCT_CHANGE	Grants Contract Editor	The Grants Contract Editor role allows the vendor user to make changes to a grant contract budget and work plan. *This does not allow submission on a contract to the state agency. This allows for edits of the contract before submission and during any revisions.	Contract & Grant Specialists

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NY_ES_SUPPLIER_CONTRACT_APPRVR	Grants Contract Approver	The Grants Contract Approver role allows the vendor user the ability to review, approve, and sign the grant contract document	Contract & Grant Specialists
NY_ES_SUPPLIER_CONTRACT_COLLAB	Grants Contract Collaborator	The Grants Contract Collaborator role allows the vendor user the ability to review and collaborate on a grant contract with the agency. This collaboration is performed before the contract is approved by the vendor. * This provides access to budget and work plan before the contract is submitted to the state agency and this is required to view all contracts. This does not allow submission of a contract to the state agency. This must be assigned to the user before the draft contract is issued otherwise the Workflow Administrator (WFA) must do the following to make it viewable: 1. Ask the Agency Grant Contract Processor to select the Cancel Workflow option on the grant contract to cancel the entire workflow and then resubmit the grant contract into workflow. The new workflow will include the new vendor user. 2. Ask the WFA to re-assign the grant contract to the vendor at that step in the workflow. 3.Ask the WFA to restart the entire workflow back to the beginning.	Centralied Campus Pre-Award Staff Proposal Specialists Contract & Grant Specialists, Accounts Receivable Staff
NY_ES_SUPPLIER_PRGRPT_INQ	Progress Report Inquiry	The Progress Report Inquiry role allows a vendor user to review progress reports. This is a view-only role.	All Users
NY_ES_SUPPLIER_PRGRPT_USER	Progress Report Processor	The Progress Report Processor role allows a vendor user to create and submit a progress report to the agency for review.	Principal Investigators/Program Staff Accounts Receivable
NY_GM_VENDOR_SCHED_RPT	Scheduler Report Access	The Scheduler Report Access role allows a vendor to review schedule reports.	Don't assign at this time.
NY_EM_SUPPLIER_CLAIM_ENTRY	Claim Initiator	The Claim Initiator role allows a vendor user the ability to enter a request for an advance (if allowed on the contract) or reimbursement claim. This role does not have the ability to certify or submit the claim.	Accounts Receivable Staff
NY_EM_SUPPLIER_CLAIM_CERT_SUB	Claim Certifier and Submitter	The Claim Certifier and Submitter role allows a vendor user the ability to certify and submit a request for an advance (if allowed on the contract) or reimbursement claim.	Accounts Receivable Staff
NY_EM_SUPPLIER_CLAIM_INQUIRY	Claim Inquiry	The Claim Inquiry role allows a vendor user to review Claims. This is a view-only role.	Accounts Receivable Staff and any user on request. Read Only.