PASSPort
Procurement and Sourcing Solutions Portal

Vendor User Provisioning

This is a quick reference guide for Vendor Admins who will be assigning roles to users in their organization. If you have any questions or need assistance, please reach out to the MOCS Service Desk.

Now that PASSPort functionality has expanded to Catalog Management, Requisitions, Purchase Orders, Receiving, and Invoicing and Payments, you will be provisioning members of your organization with new roles to manage these tasks.

ROLE	ASSIGN ROLES	EDIT DISCLOS.	CHECK PROG.	SIGN DISCLOS.	RESPOND TO PE'S	VIEW CATALOG	IMPORT CATALOG	EXPORT CATALOG	VIEW INVOICE	CREATE INVOICE	EDIT INVOICE	CANCEL INVOICE	EXTRACT PO	REJECT PO	CONFIRM REC. REQUEST
Vendor Admin	✓	✓	✓	✗	✓	✓	✗	✗	✓	✗	✗	✗	✗	✗	✗
Signatory	✗	✓	✗	✓	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Contributor	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Vendor Procurement L1	✗	✗	✗	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗
Vendor Procurement L2	✗	✗	✗	✗	✗	✓	✓	✓	✗	✗	✗	✓	✓	✓	✗
Vendor Financials L1	✗	✗	✗	✗	✗	✓	✗	✗	✓	✗	✗	✗	✗	✗	✗
Vendor Financials L2	✗	✗	✗	✗	✗	✓	✗	✗	✓	✓	✓	✓	✗	✗	✓

Vendor Roles in PASSPort

The following are the available roles in PASSPort related to Release 2:

❑ **Vendor Admin** – ability to assign profiles to vendor users within their organization. This role also has read-only access to the catalog and invoice modules.

❑ **Signatory** – Is legally authorized to sign and submit information on behalf of the organization.

❑ **Contributor** – ability to electronically edit the disclosures, but cannot sign and submit the enrollment package.

❑ **Vendor Procurement L1** – read-only access to Catalogs, Reconciliation Requests, and Purchase Orders.

❑ **Vendor Procurement L2** – ability to import and export Catalogs, reject Purchase Orders, and confirm Reconciliation Requests.

❑ **Vendor Financials L1** – read-only access to Invoices, Invoice Deductions, and Reconciliation Requests.

❑ **Vendor Financials L2** – ability to view, create, and cancel Invoices and Invoice Deductions, as well as confirm Reconciliation Requests.

The full list of roles can be seen in the "Role" drop-down menu on the Contacts tab.

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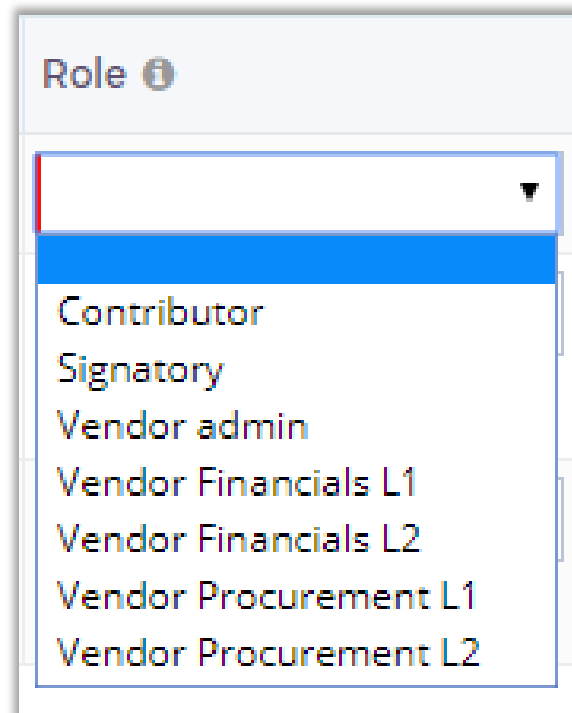
Adding a Vendor Contact

Before roles can be assigned, a user must first be added as a Vendor Contact:

❑ From any page in PASSPort, click the **"Profile"** tab at the top of the page.
❑ Select **"Vendor Profile"** from the drop-down menu.
❑ Navigate to the **Contacts** tab.
❑ Click the **"Add a Contact"** button.
❑ Enter the First name, Last name, and Email, then click **"Save and Close."**

⚠️ Each Vendor Contact must be added using a unique email address. You must assign at least one role to each user added. The Vendor Contact must then create an NYC ID for the same email address associated with their contact information before they can log into PASSPort.

Assigning a Role to Vendor Contacts

Once a Vendor Contact has been added, you can assign a role to that user. Each user must have at least one role associated with their Contact information, and can have multiple roles assigned if necessary.

❑ From any page in PASSPort, click the **"Profile"** tab at the top of the page.
❑ Select **"Vendor Profile"** from the drop-down menu.
❑ Navigate to the **Contacts** tab.
❑ Next to the name and email address of the Vendor Contact you are assigning roles to, click the **"Roles"** drop-down menu.
❑ Click on the role you would like to assign. Repeat for each role you are adding.
❑ Click **"Save."**
Note: Roles will show underneath the drop-down menu when they have been successfully added.

⚠️ Only Vendor Admins can add new contacts in PASSPort and assign roles to these users. MOCS recommends having at least two Vendor Admins associated with your organization's PASSPort account in order to avoid access issues.