Vendor Portal

User Manual

Westchester County Department of Information Technology

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Westchester gov.com

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Table of Contents

1. Overview 3

2. Accessing the application 3

3. Account Management 4

3.1 Account Creation 4

3.2 Account Information 5

3.3 Account Login 6

3.4 Contract Information 7

4. Vendor Document Repository 7

4.1 Document Management 8

4.1.1 Upload Documents 10

4.1.2 View Uploaded Documents 12

4.1.3 Associate contracts to uploaded documents 13

5. Support 15

1. Overview

The Vendor Portal is a place where vendors can find software systems that will help them efficiently manage information related to the County's contracting process. The first module available through the online portal is called the Document Repository and it was launched in mid-2014. County vendors can use this module to manage and upload documents that may be common to their County contracts. Over time, additional software systems will be added to the portal that will allow vendors to plan and manage budgets, submit claims for payment and to report contract performance indicators.

2. Accessing the application

You can go directly to the vendor portal by opening your web browser and typing:

http://vendorportal.westchestergov.com/ into the Address or URL field at the top of the screen.

In addition, you can access the portal from the Westchester County Website by typing

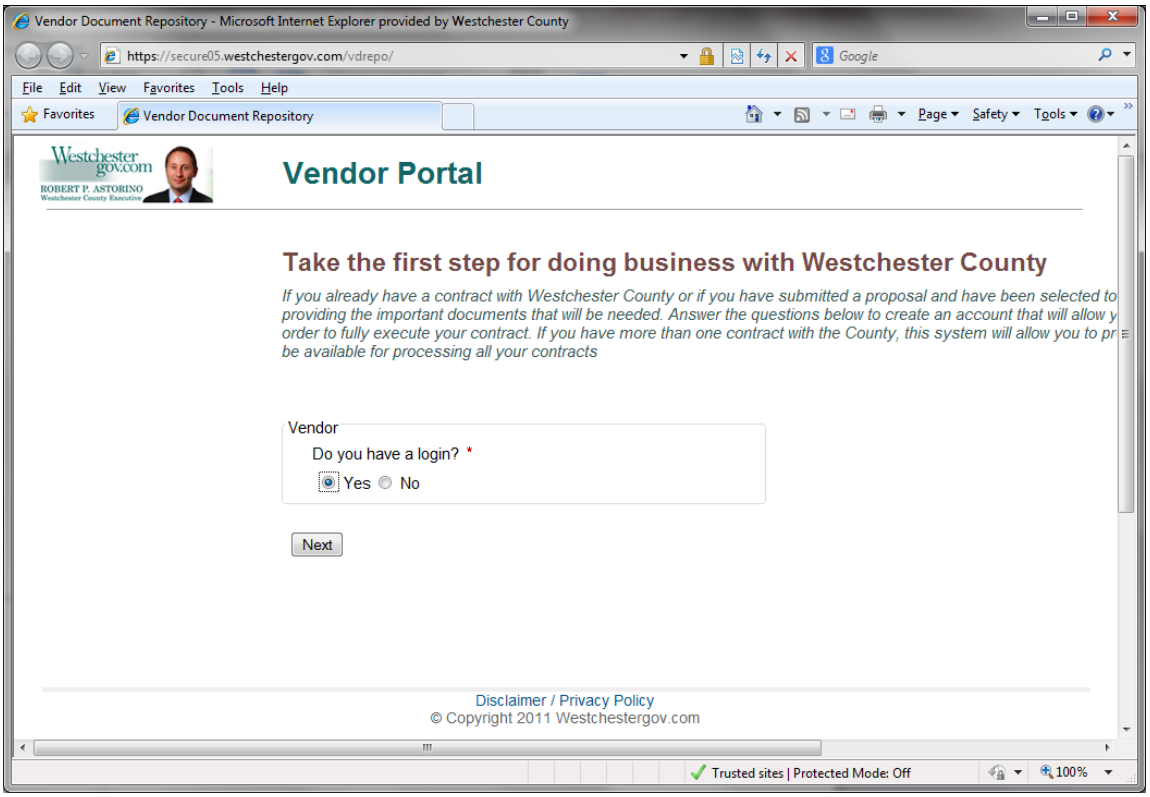
http://www.westchestergov.com/vendorportal into the Address or URL field of your web browser.

3. Account Management

The steps to create an account and login are given below.

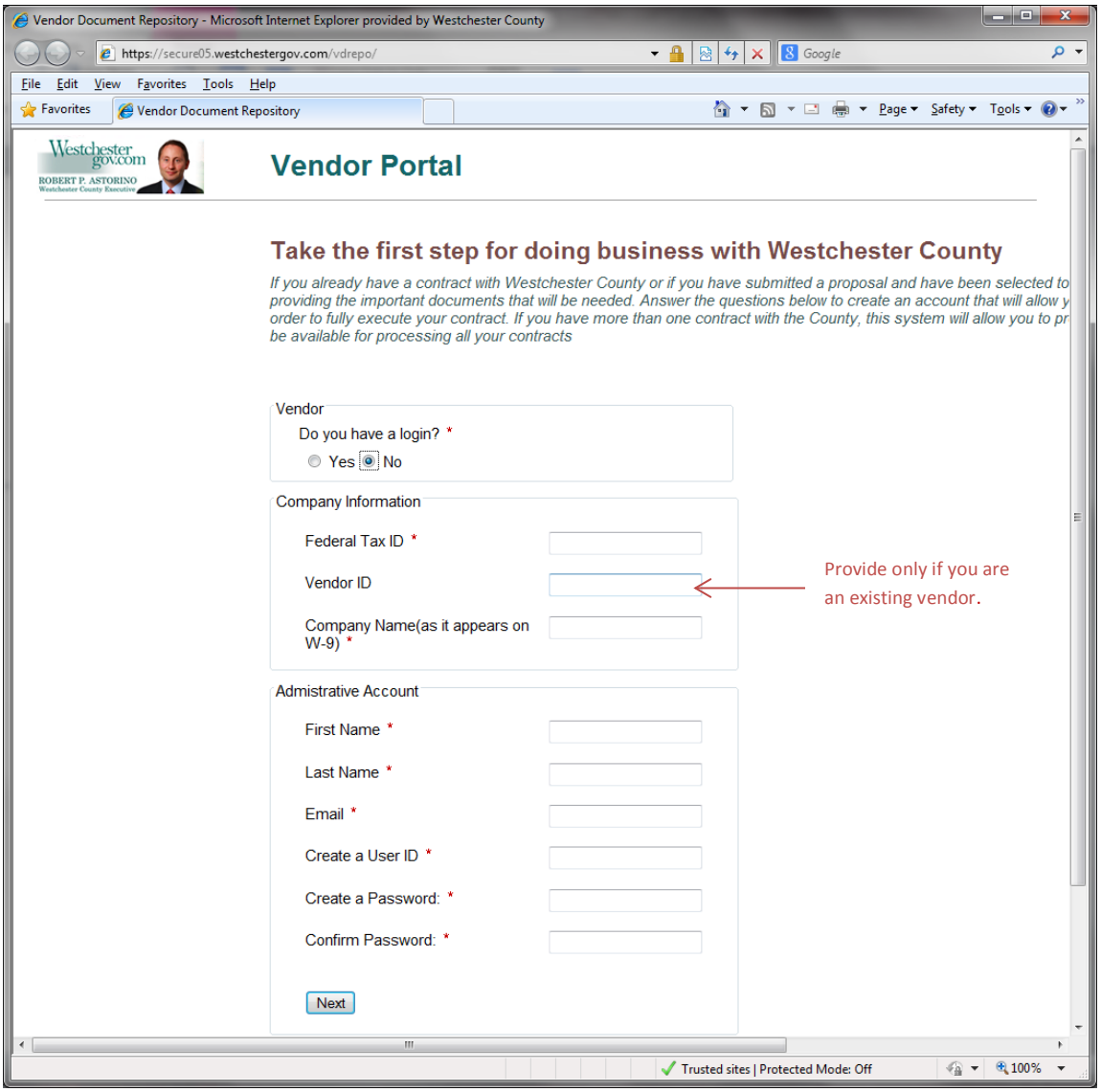
3.1 Account Creation

If you are a new user select **No** and you will be given an option to create an account. If you already have a login select **Yes** and you will be forwarded to a login page (Step 3.3).



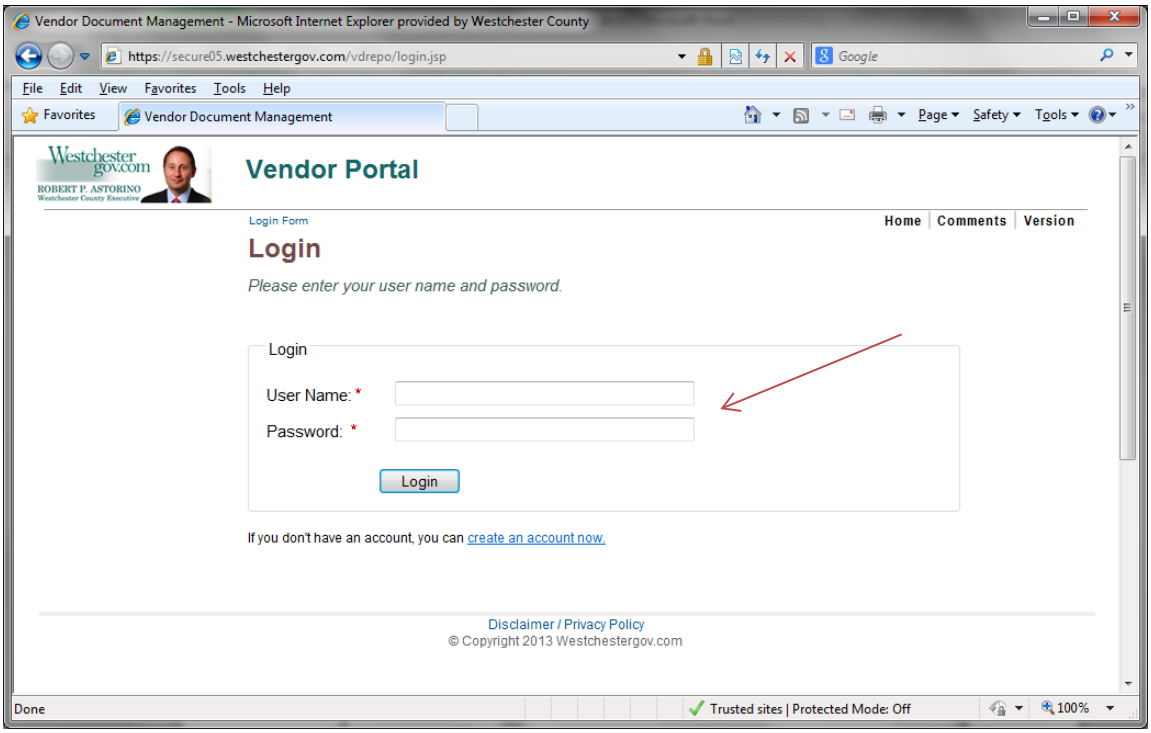
3.2 Account Information

If you are a first time user of this application, please complete the information below. Fields with an asterisk (*) are required.



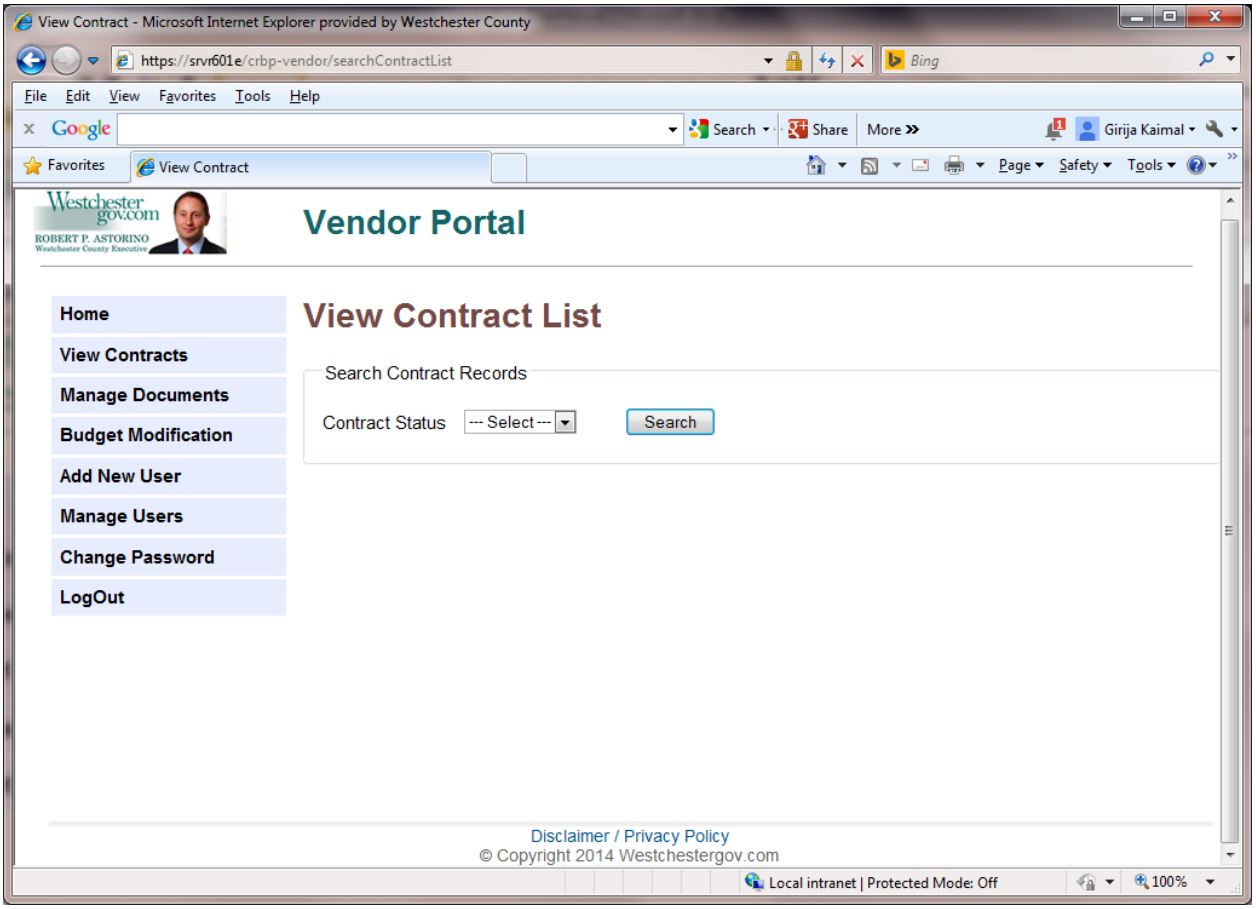
3.3 Account Login

Once you have completed the account creation screen, you will be directed to the login screen. Please log in using the user ID and password that you entered while creating the account.



3.4 Contract Information

Your agency will be notified that a contract is ready for processing through an automated email. Once you recieve that email, use the View Contracts item on the left side menu to see the County contracts that have been added to your portal account. You can search for contracts based on contract status. You can click on the search results to see the contract information.



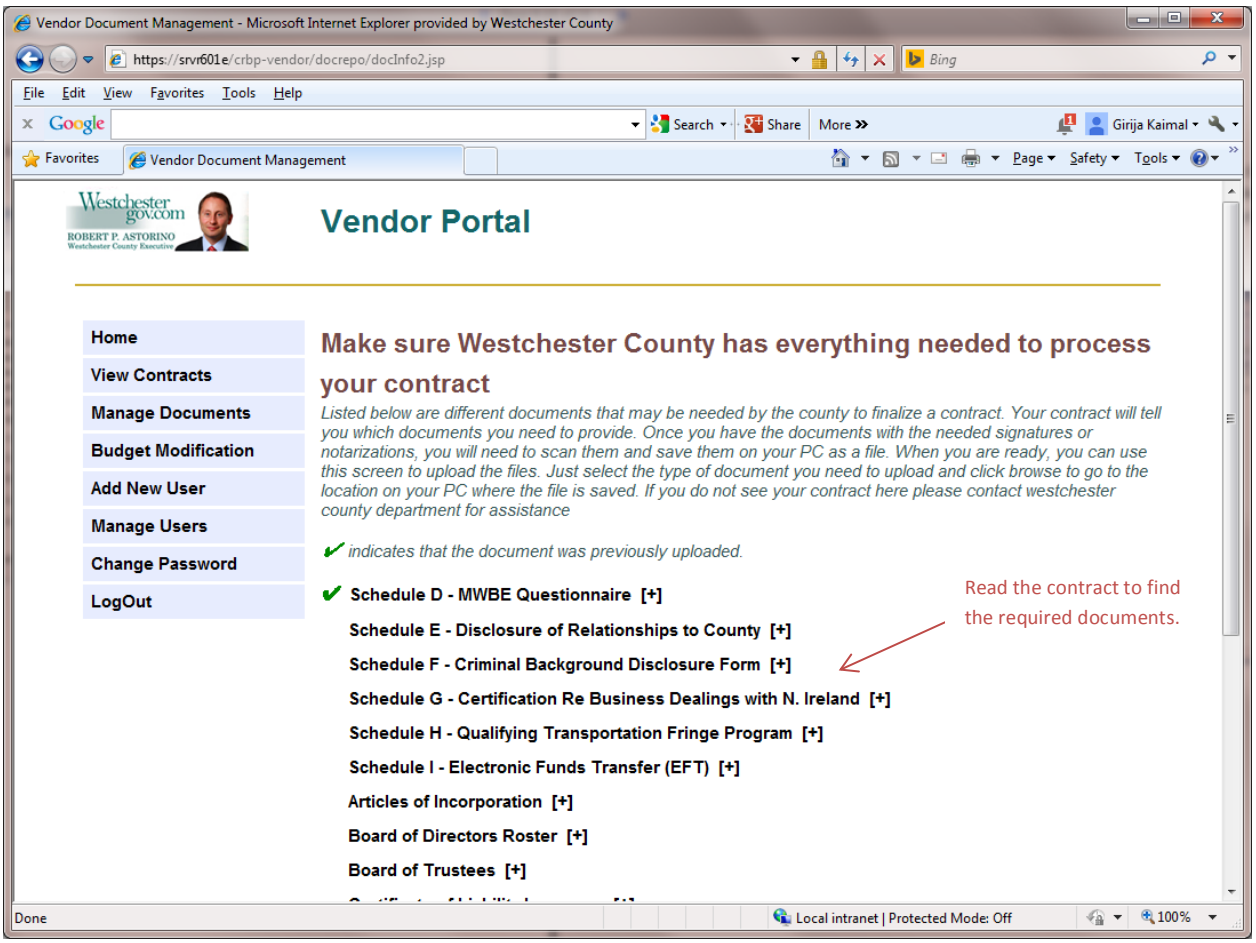
4. Vendor Document Repository

The Vendor Portal – Vendor Document Repository allows vendors to upload documents that are typically attached to County contracts. You will still need to read each contract to see exactly which documents are required, but some documents can be used for many contracts. This system allows you to upload each document once and attach them to every contract that requires them. Once you have collected all the documents with any necessary information, signatures or notarizations, scan each document and save them as PDF on your computer. When the documents have been scanned, create an account on the portal and start uploading the files. The list of all documents that can possibly be uploaded will be presented on the screen, including documents may not be required for certain contracts. Details of how to upload required documents are given in a later section in this user manual.

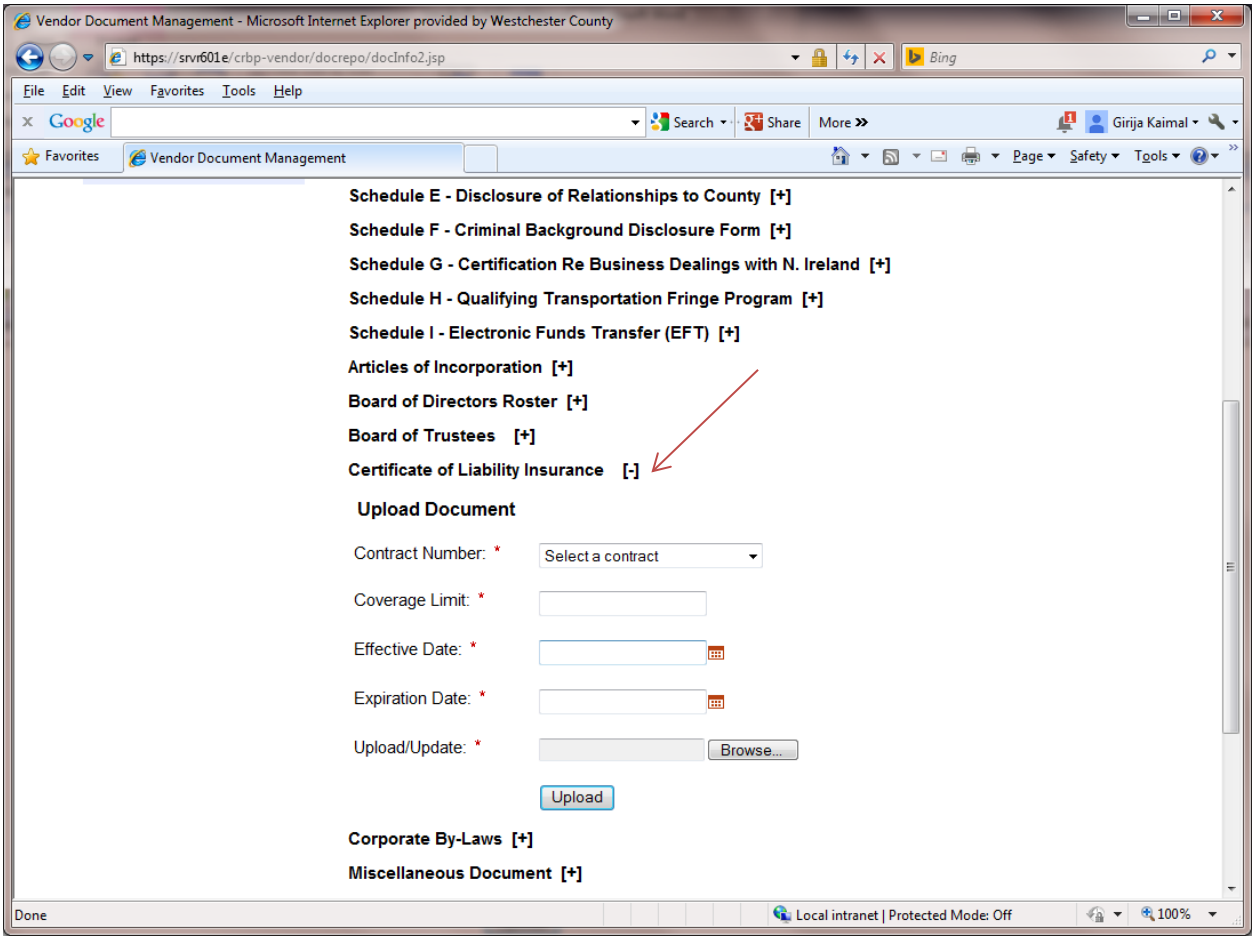
For vendors that have multiple contracts with the County, common documents can be uploaded once to support all contracts where they are required.

4.1 Document Management

Once you have added contracts to your account, click on **Manage Documents** on the left side menu. Here, you can upload a new document, view or download a document that was previously uploaded. You can also associate a new contract with an uploaded document. Each contract will specify the documents required by the county department issuing the contract or the grants that pay for the contract. Please read each contract carefully to determine what documents are required.

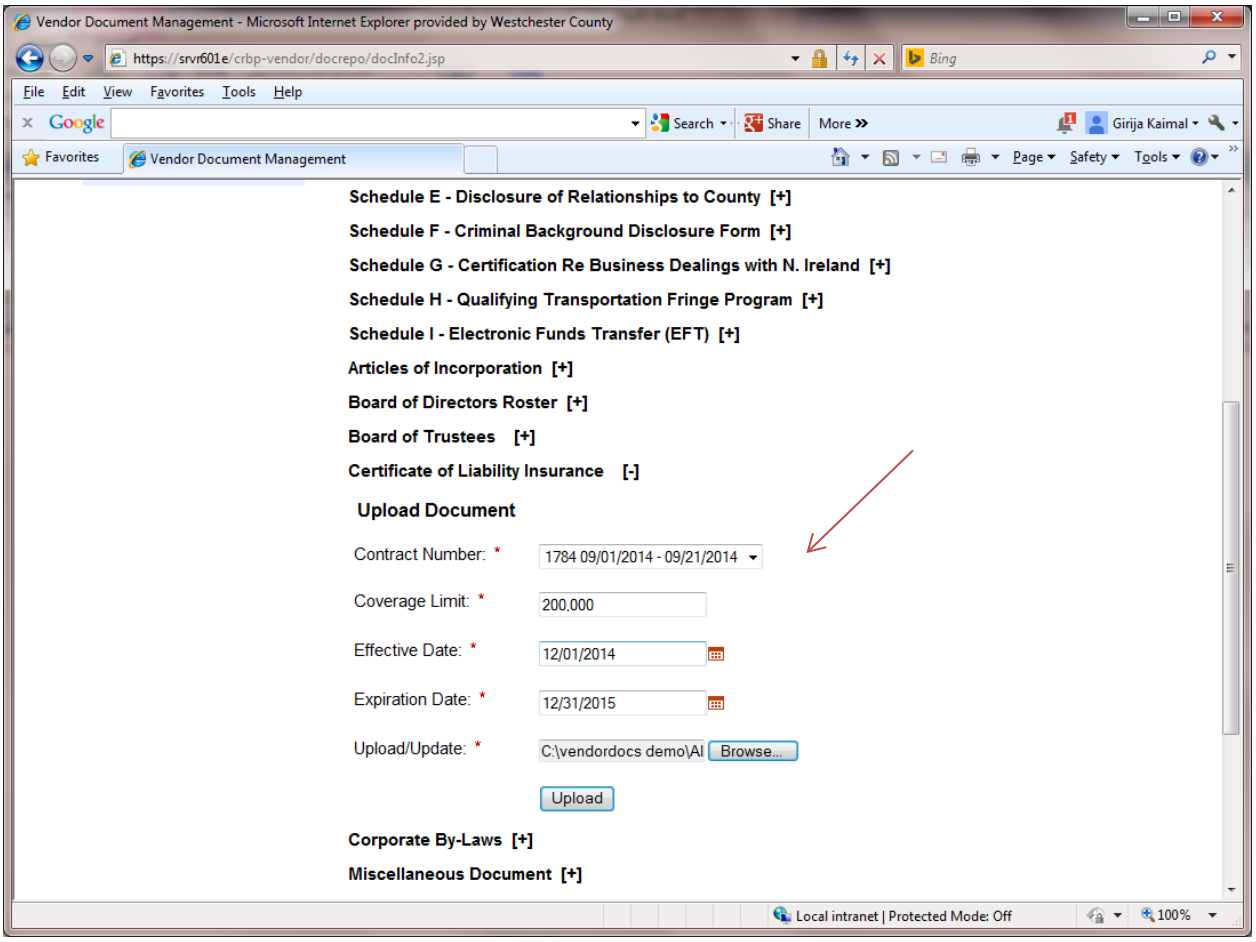


Select a document type by clicking on the document name or the **[+]** sign to the right.

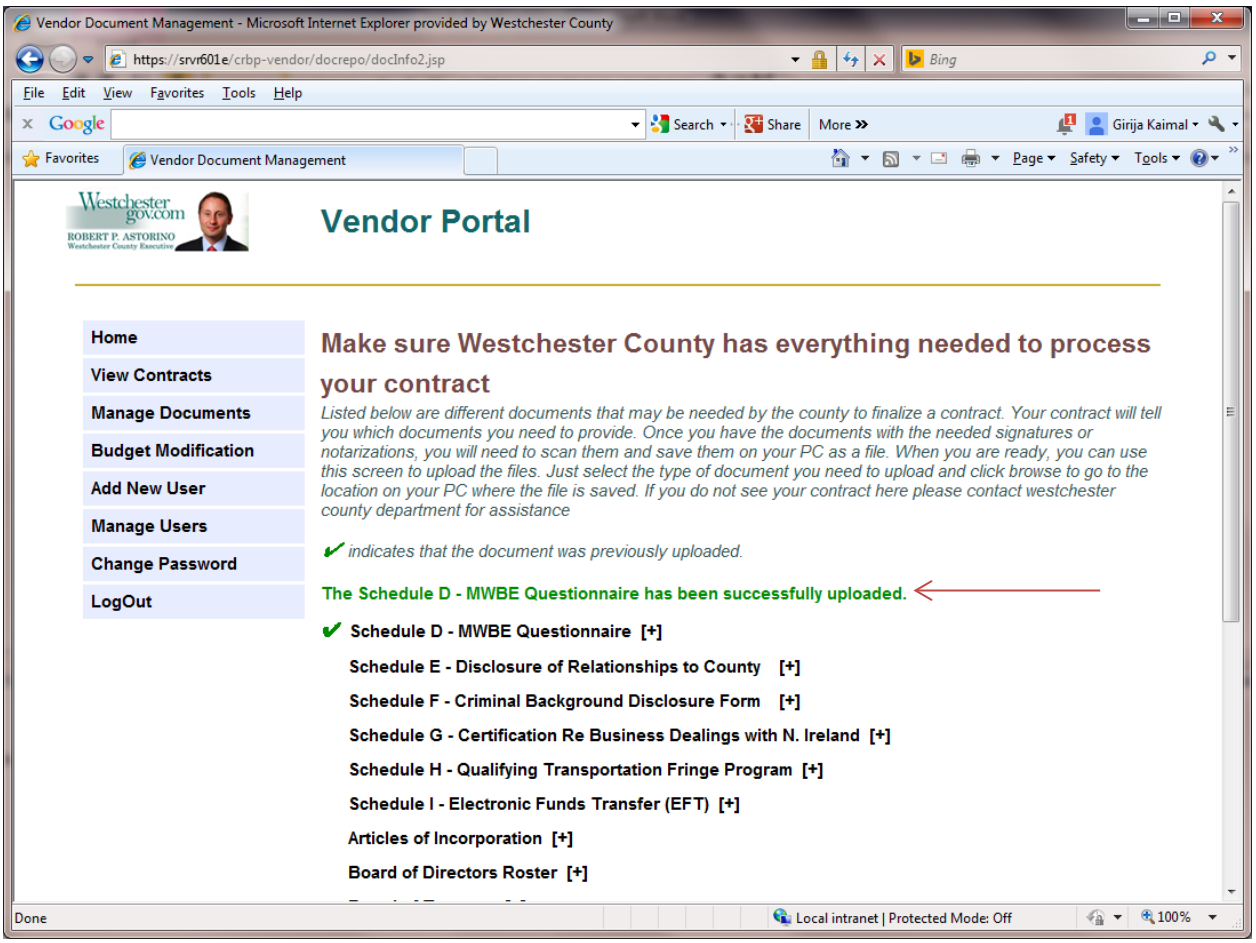


4.1.1 Upload Documents

To upload a new document, select the contract number from the drop down list. The list will also show the start and end dates to help you identify the correct contract. You may be asked to complete other pieces of information as required by the type of the document (expiration dates for liability insurance, for example). Once all the information is entered, browse to the document file on your computer and click the **UPLOAD** button.

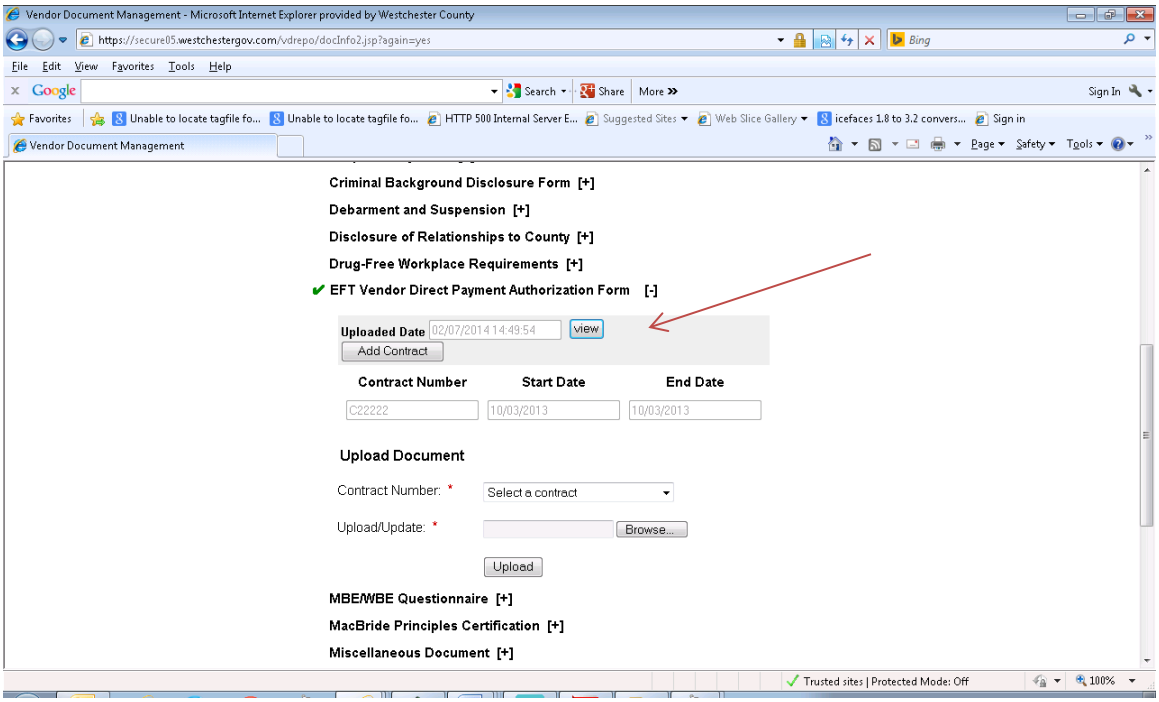


Upon successful completion of an upload, you will see a message saying that the document has been uploaded successfully. You can continue uploading the rest of the documents until you have all necessary documents uploaded successfully.



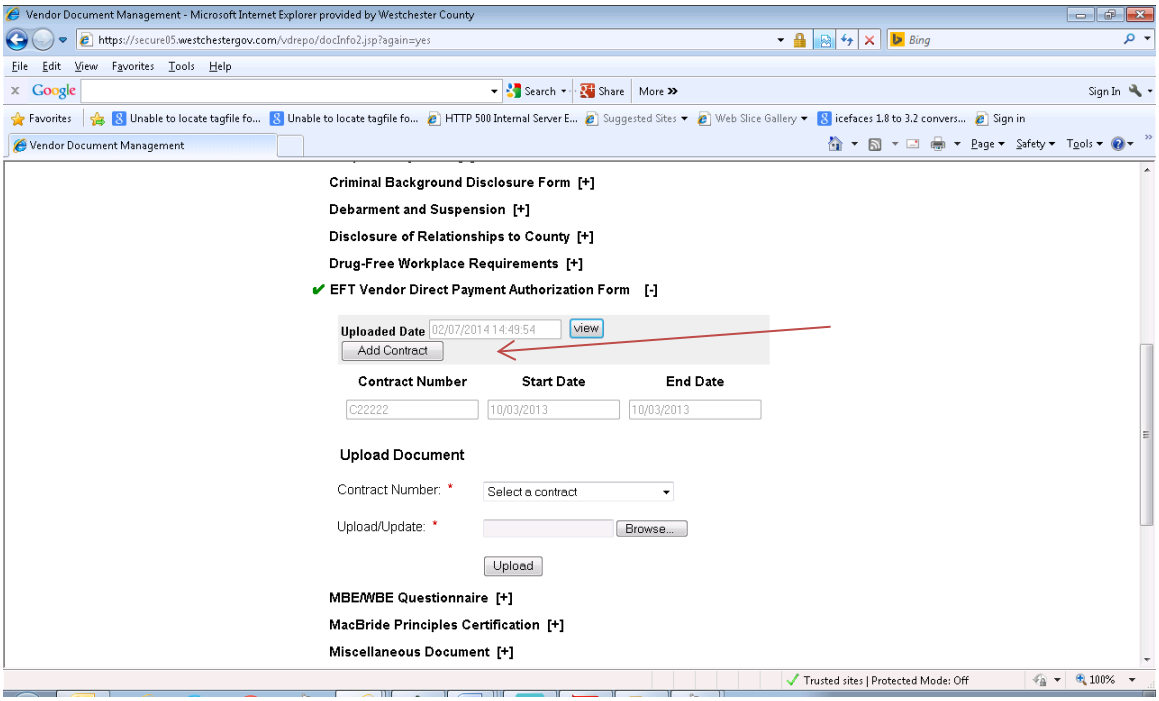
4.1.2 View Uploaded Documents

To view an existing document select a document type by clicking on the document name or the **[+]** sign to the right and then clicking the **VIEW** button.

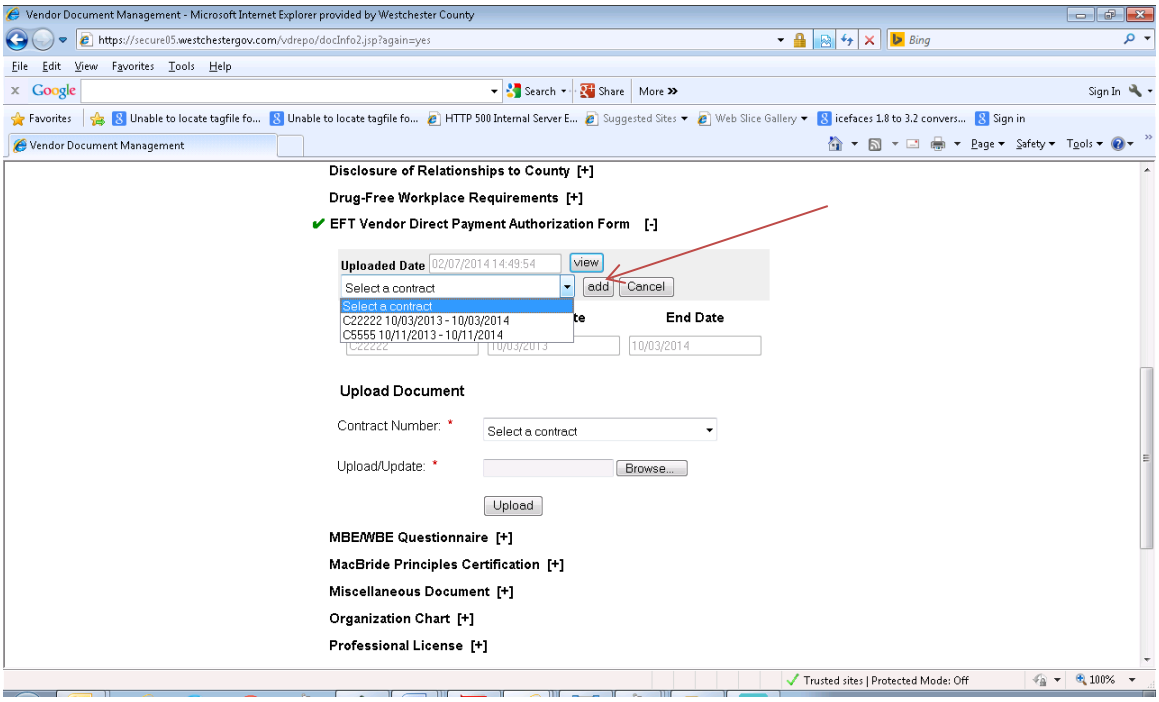


4.1.3 Associate contracts to uploaded documents

When you are entering into a new contract with the County, you can link previously uploaded documents to the new contract instead of uploading documents again, by clicking the **ADD CONTRACT** button.



Select the new contract from the drop down list and click the **Add** button. The list will also show the start and end dates to help you identify the correct contract. Using this feature will allow you to reuse existing active documents for new contracts, whenever it's appropriate to do so.



5. Support

If you encounter any issues or have any questions, please contact the Westchester County Help-Desk at **914-995-5513** or by sending an email to **DoITHelpDesk@westchestergov.com**.