

# UNIVERSITY OF ILLINOIS

Office of Business and Financial Services  
University Office of Capital Programs & Real Estate Services

## VSA REFERENCE GUIDE

*A Guide for Vendors, University Managers and Staff*

*Last Updated: 03/17/15*

---

## Table of Contents

<b>About the Vendor Services Application .....</b>	<b>3</b>
<b>How VSA Is Organized .....</b>	<b>3</b>
<b>How Registration Works.....</b>	<b>3</b>
<b>What You Need to Know .....</b>	<b>3</b>
<b>Information for VSA Vendors .....</b>	<b>4</b>
Determine if the Company is registered with VSA.....	4
Create a Company-Level Vendor Record.....	4
Create a User Account .....	5
Create an Additional Organization .....	6
Add a New User to an Organization.....	6
<b>Information for University Managers and Staff.....</b>	<b>7</b>
Search for a Company, Organization, or User.....	7
Create a New Vendor .....	7
Add an Organization to a Vendor.....	8
Manage Users for a Vendor.....	8
Add Additional Contacts to a Vendor .....	8
<b>Additional Support .....</b>	<b>9</b>

---

## About the Vendor Services Application

Vendor Services Application (VSA) collects basic information about a vendor (or other external organization) and its related employees in a central location. VSA vendor records and user accounts will share information with capital applications, ensuring that a vendor's legal name, location(s), address(es), and related information are consistent and accurate. If you are new to capital programs at the University of Illinois, you will need to register.

## How VSA Is Organized

VSA requires relationships among a vendor's company, its organization(s)/location(s), and its employees, who register as vendor-related end-users of the University's capital applications. For example, if a vendor has two locations, each location has a related prime contact and an end-user account (not necessarily the same person); and Location A may have one end-user, while Location B may have two. Prime Contacts can modify location information, but, for security reasons, only an end-user can modify his or her individual user information.

## How Registration Works

When a new vendor wishes to work on a capital project, a Prime Contact fills in required information about the company as a whole and at least one related organization, as well as the Prime Contact's basic information and user account. All other employees of the same vendor would subsequently select the company and organization/location, and then register as an individual vendor-related user. A single organization can have multiple related locations, but each location requires a Prime Contact and end-user registration.

Company registration requires the legal name of the company, its organization type (e.g., corporation, LLC, etc.), the state in which it was incorporated, its IDHR number, and information about its status as a minority or disadvantaged firm, if applicable. End users only supply individual information, such as name, phone number, and email address; each person then creates a user account name and password.

## What You Need to Know

Anyone who wishes to use University of Illinois capital applications must register with VSA. To register, search for your company's FTIN (Federal Tax Identification Number) and register yourself as a new user. If the company is not found, someone from the company will have to register as a new vendor with the required information. Then you can register as either the prime contact for your organization/location, or as a related end-user.

University of Illinois staff can search for and view vendor information in the VSA. Searches are available by the company's FTIN (Federal Tax Identification Number), the vendor name, or a registered user's name. Only University staff designated by their units as Vendor Services Application (VSA) Managers may modify a vendor record. Those functions are described later in this document.

---

For security reasons, end-users may only edit their own individual user accounts. Vendor employees may only edit their own individual user accounts. Even Prime Contacts will be unable to edit or delete the accounts of other users from their company or location. Should such changes need to be made, a Prime Contact may call or email the AITS Service Desk and inquire about making changes.

**NOTE FOR ALL VSA FORMS:**

- Fields marked with a red asterisk (\*) are required.
- Use the following formats for dates and phone numbers:  
*Dates:* MM/DD/YYYY  
*Phone Numbers:* (###) ###-####

## Information for VSA Vendors

### Determine if the Company is registered with VSA

1. Navigate to [www.uocpres.uillinois.edu](http://www.uocpres.uillinois.edu).
2. Land on the **Applications** tab.
3. Select the **VSA Registration** option.
4. Select the **New Vendor Registration** link.
5. Enter the nine-digit FTIN (Federal Tax Identification Number) of your firm and click the **Search** command button.
6. If your firm is not listed, **create a company-level vendor record** on the New Vendor Registration form (see next section).
7. If your firm is listed, **create a user account** (see next page).

### Create a Company-Level Vendor Record

1. Complete the **Vendor Profile** section; for reference, select the **Vendor Profile Instructions** link.
2. Complete the **MAFBE Certification Profile** section; for reference, select the **MAFBE Certification Profile Instructions** link.
3. Complete the **Registered Agent Profile** section; for reference, select the **What is a Registered Agent** link and the **Why do I need a Registered Agent** link.
4. Complete the **Organization Profile** section; for reference, select the **Organization Instructions** link and the **Contact Instructions** link.
5. Complete the **User Profile** section; for reference, select the **User ID Requirements** link and the **Strong Password Requirements** link.
6. Check the **Registration Verification** box.
7. Click the **Submit** command button.
8. Select the **Vendor Services Application** link.
9. Enter your **Vendor ID** and **Password**.

**NOTE:** The Vendor ID is the same as your User ID.

- 
10. Select each of three questions, and provide your personalized answers and answer verifications.

**NOTE:** This is a one-time request to establish security questions and answers. Note the link near the bottom of the page to review security question criteria.

11. Click the **Submit** command button.
12. Review the **User Information** column to ensure accuracy.
13. Select the **Edit User Profile** link to modify the information if needed.
14. Select the **Logout** link if the information is correct.

## Create a User Account

1. Navigate to [www.uocpres.uillinois.edu](http://www.uocpres.uillinois.edu).
2. Land on the **Applications** tab.
3. Select the **VSA Registration** option.
4. Select the **New Vendor Registration** link.
5. Enter the nine-digit FTIN (Federal Tax Identification Number) of your firm and click the **Search** command button.
6. Select the Organization Name which corresponds to your location, office, division, or branch.
7. Complete the **User Profile** section; for reference, select the **User ID Requirements** link and the **Strong Password Requirements** link.
8. Check the **Registration Verification** box.
9. Click the **Submit** command button.
10. Select the **Vendor Services Application Login** link.
11. Log in using the credentials you just created to confirm your login.
12. Select each of three questions, and provide your personalized answers and answer verifications.

**NOTE:** This is a one-time request to establish security questions and answers. Note the link near the bottom of the page to review security question criteria.

13. Click the **Submit** command button.
14. Review the **User Information** column to ensure accuracy.
15. Select the **Edit User Profile** link to modify the information if needed.
16. Select the **Logout** link if the information is correct.

**NOTE:** Your username and password may now be used to log in to the capital applications, such as VSA.

---

## Create an Additional Organization

An organization is an entity under the company that is a distinctive part, location, or related branch. Examples of an organization might be a department, division, office, or branch. For example, a company might have Chicago and Springfield locations. Or a company could have two branches, such as the Architecture Division and the Engineering Division. It is not necessary to have more than one organization for a company. However, if there are multiple addresses, it can be helpful to have each one listed as a separate organization.

Only a Prime Contact may create additional organization(s). The vendor's Prime Contact will be required to add the organization's Prime Contact and at least one user to the organization profile.

1. Navigate to [www.uocpres.uillinois.edu](http://www.uocpres.uillinois.edu).
2. Land on the **Applications** tab.
3. Select the **CAPS & VSA Vendor Dashboard** option.
4. Log in using your credentials.
5. Select the **Add New Organization** link in the Organizational Profile section.
6. Complete the **Organization Profile** section; for reference, select the **Organization Instructions** link and the **Contact Instructions** link.
7. Check the **Registration Verification** box.
8. Click the **Submit** command button.

## Add a New User to an Organization

If there is more than one organization, a Prime Contact can add additional users. Only a Prime Contact may add new users for an organization. New users may also register themselves.

1. Navigate to [www.uocpres.uillinois.edu](http://www.uocpres.uillinois.edu).
2. Land on the **Applications** tab.
3. Select the **CAPS & VSA Vendor Dashboard** option.
4. Log in using your credentials.
5. Select the link to **Add User** in the Organizational Profile section.
6. Complete the **User Profile** section; for reference, select the **User ID Requirements** link and the **Strong Password Requirements** link.
7. Check the **Registration Verification** box.
8. Click the **Submit** command button.
9. Select the Vendor Services Application Login link.

---

## Information for University Managers and Staff

### Search for a Company, Organization, or User

1. Navigate to [www.uocpres.uillinois.edu](http://www.uocpres.uillinois.edu).
  2. Land on the **Applications** tab.
  3. Select the **UI Staff – CAPS & VSA** option.
  4. Log in using your credentials.
  5. Search for a vendor in the **Vendor Management** module; choose one radio button and enter the appropriate search text.
    - **FTIN:** The nine-digit FTIN (Federal Tax Identification Number) of the firm.
    - **Vendor:** The most distinctive word from the firm's name.
    - **User:** One of the user's names (either first or last name, not both).
- NOTE:** Wildcard characters are not necessary when searching, because the application automatically adds the wildcard character to the search. Broaden the search by using only a part of a vendor's name or a user's name, if necessary.
6. Click the **Search** command button.
  7. Click the company, organization, or user you are searching for.

**NOTE:** If the firm or user is not listed, they may not be registered.

**NOTE:** Most University Staff may not edit vendor records. However, selected persons with the role of University Manager may edit selected information.

**NOTE:** MAFBE certification and Registered Agent information appears on all of a company's related organization pages.

### Create a New Vendor

1. Search for the company's FTIN (see **Search for a Company, Organization, or User** section above).
2. If the company is not listed, the Organization Selection page appears with the Add a Vendor option displayed.
3. Click the **Add FTIN** command button.
4. Complete the **Vendor Profile** section.

**NOTE:** In the **Legal Vendor Name** field, this Legal Vendor Name will appear on all legal and binding contracts, so verify that the name is complete and accurate.
5. Complete the **MAFBE Certification Profile** section.
6. Complete the **Registered Agent Profile** section.
7. Complete the **Organization Profile** section.
8. Check the **Registration Verification** box.
9. Click the **Submit** command button.
10. Review the information for accuracy.
11. Click the **Edit Vendor** button if needed.
12. Select the **Return to Dashboard** link.

---

## Add an Organization to a Vendor

1. Search for the company's FTIN (see **Search for a Company, Organization, or User** section on previous page).
2. Click the **Add New Organization** command button.
3. Complete the **Organization Profile** section; for references, select the **Organization Instructions** link and the **Contact Instructions** link.
4. Check the **Registration Verification** box.
5. Click the **Submit** command button.

## Manage Users for a Vendor

1. Search for the company's FTIN (see **Search for a Company, Organization, or User** section on previous page).
2. Click the name of the relevant organization.
3. Click the **Manage Users** command button at the bottom of the page.
4. Click the user's name to edit the User Profile.
  - a. Click the **Edit Person Profile** command button at the bottom of the page.
  - b. Modify the relevant information.
  - c. Click the **Submit** command button.
  - d. Verify the information entered. If modifications are needed, follow steps a-c again.
5. Click the **Add User** command button to add a new user; for reference, select the **User ID Requirements** link and the **Strong Password Requirements** link.
  - a. Enter the relevant information.
  - b. Check the **Registration Verification** box.
  - c. Click the **Submit** command button.

## Add Additional Contacts to a Vendor

Contacts are added only to one of a vendor's organizations.

1. Search for the company's FTIN (see **Search for a Company, Organization, or User** section on previous page).
2. Click the name of the relevant organization.
3. Click the **Manage Contacts** command button.
4. Click the **Add Contact** command button.
5. Complete the **Contact Profile** section.
6. Click the **Submit** command button.
7. Review the contact's information.
8. Click the Contact's name to edit existing contact.
  - a. Click the **Edit Contact Profile** command button.
  - b. Modify the contact's profile as necessary.
  - c. Click the **Submit** command button.



---

## **Additional Support**

For support, please contact the AITS Service Desk.

**UIC:** 312-996-4806

**UIS and UIUC:** 217-333-3102

[servicedeskait@uillinois.edu](mailto:servicedeskait@uillinois.edu)