

## Setting Up Teams

*This document serves as a quick reference guide for vendor users who will be adding colleagues to a team in PASSPort. Need help? Contact the MOCS Service Desk at [help@mocs.nyc.gov](mailto:help@mocs.nyc.gov).*

*When a draft RFX response is created, only the user who initiated the proposal through clicking on the “Participate in RFX” button and completing the acknowledgement, will be on this RFX team. As a result, they will be the only one who can work on this proposal. If the initial vendor user wants to add teammates to contribute to the proposal, the Setup Team tab can provide access to an RFX to additional colleagues.*

Note: only Vendor Admin, Vendor Procurement Level 1 or Vendor Procurement Level 2 can add users.

### Setting Up Teams

To draft a colleague as a team member from within PASSPort to work on your proposal, please follow the below steps:

- From the PASSPort top header navigation, click the **RFX** tab, then click to select **Browse All RFX** from the appearing drop-down menu.
- You will land on the **Browse All RFX** screen. This page, like the City Record, lists all competition opportunities. This page is searchable by Agency, Program, Industry, and Commodity.
- To review the solicitation details, click the pencil icon to open an opportunity.
- To select an existing PASSPort contact, select their name from the **Choose a contact** drop-down menu in the middle of the screen.
- To bring someone into this proposal’s process, press the **Create a new contact** button.
- When creating a new contact, **Contact Management** will pop up. Here you will enter the relevant information for the contact.
  - Required data has a red marker.
- Add in the contact’s First Name, Last Name, and Email.
- Click the **Save** button to finish creating the contact and adding the new member to your team.