



# CITY OF CHICAGO DELEGATE AGENCY

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## iSupplier (eProcurement) Overview



# Agenda

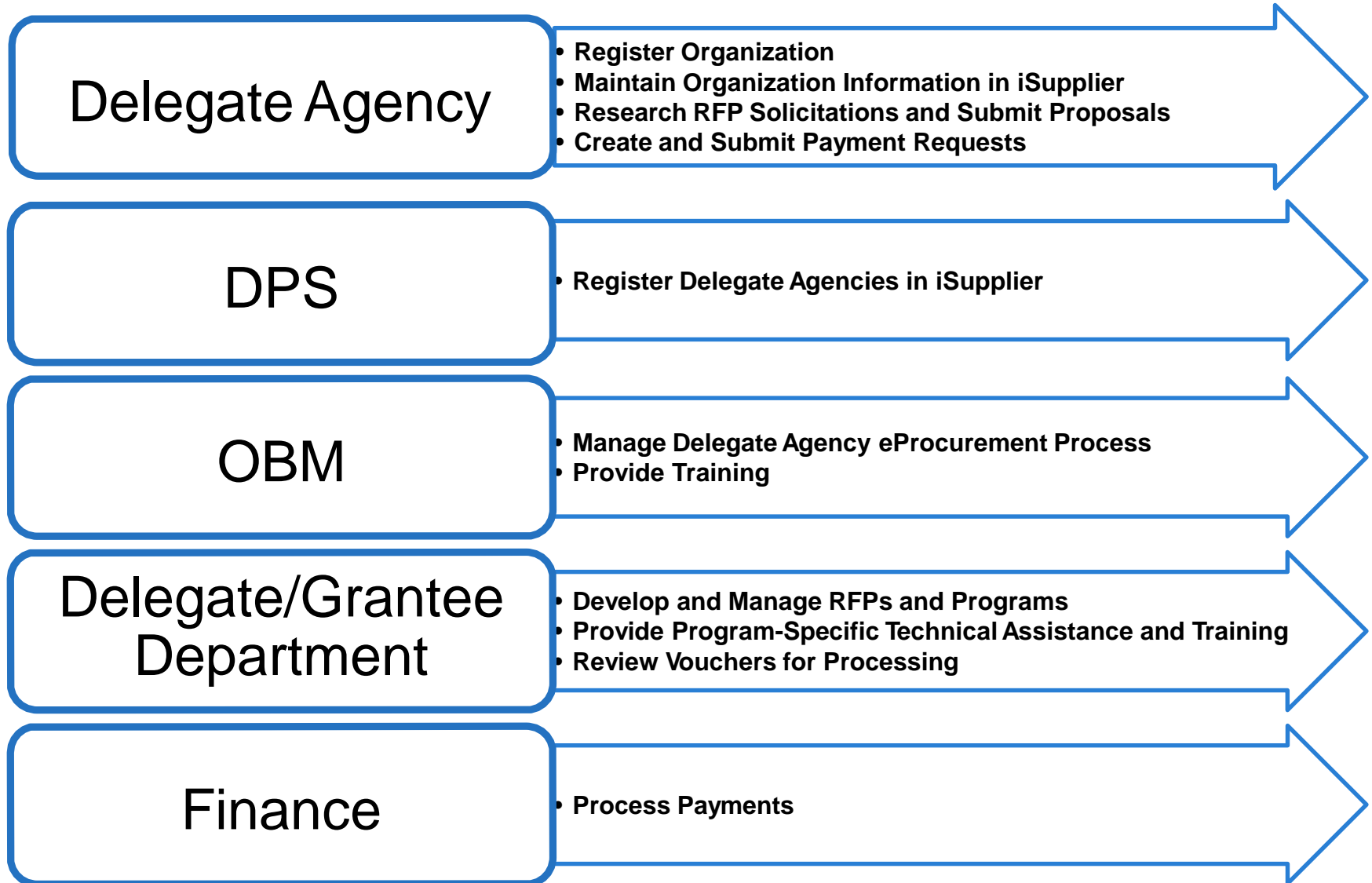
- ❖ Welcome and Introduction
- ❖ Overview of iSupplier (eProc)

# What is iSupplier (eProcurement)?

- Real-Time Online Purchasing System with Data Export
- Required for Doing Business with City of Chicago
- Full Service System Allows Agencies to:



# General Functions and Roles



# iSupplier Site

- ❑ Registration
- ❑ Finding and Responding to RFP's
- ❑ Training Information and Alerts

[HTTP://WWW.CITYOFCHICAGO.ORG/EPROCUREMENT](http://www.cityofchicago.org/eProcurement)



# Registration and Requirements

## All vendors must have:

- Federal Employer Identification Number (FEIN)
- IRS W9 for registration and confirmation of vendor business information.
- **Vendor Names MUST MATCH Articles of Incorporation**

**New Delegates /Grantee and Existing Delegate Agencies**

<https://www.chicago.gov/city/en/depts/dps/isupplier/login-register.html>

# Login

- Self Management – Password Resets

**CITY OF CHICAGO**

\* User Name   
(example: michael.james.smith)

\* Password   
(example: 4u99v23)

[Login Assistance](#)

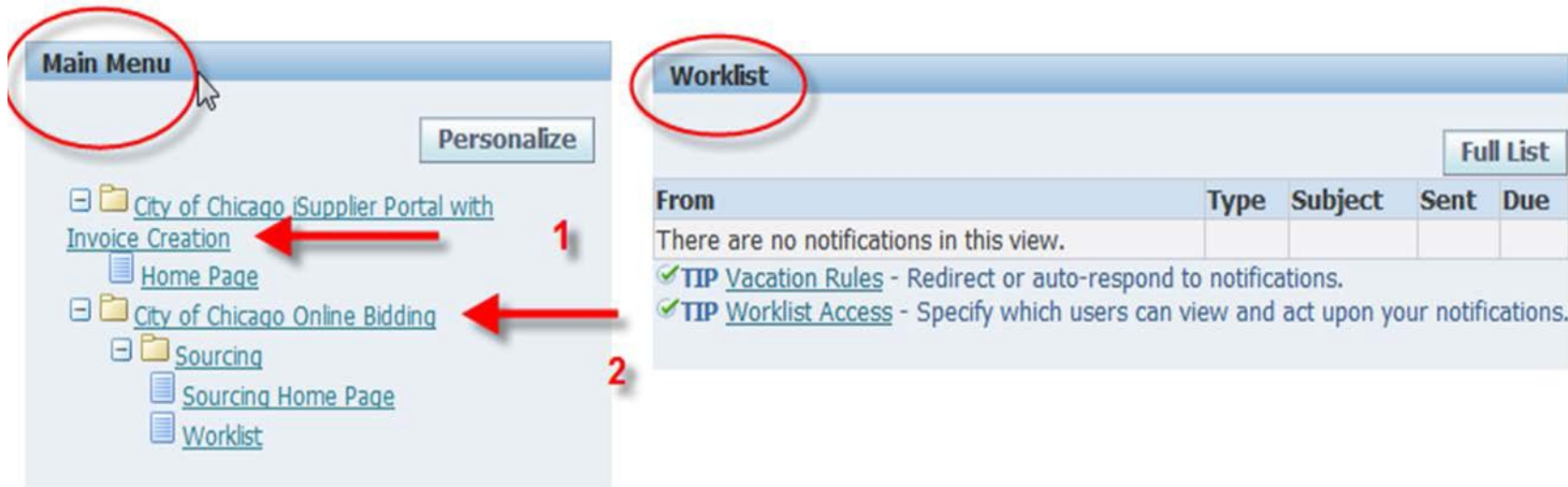
# iSupplier Homepage

## Main Menu:

- **1** Manage Administration
- Invoice Creation
  - Contracts
  - View Payments and Create Vouchers
- **2** Respond to RFP

## Worklist:

- Online Messaging
- Addendum Updates/Notification





# iSupplier Portal

- **Home:** Main Menu
- **Orders:** All History of Approved Contracts and Releases (**Real-time**)
- **Admin:** Agency Contact Information, Addresses, and Document Uploads
- **Finance:** View Vouchers, View Payments, and Create Invoices (**Real-time**)



*\*Actual Copies of Contract and Payment Information are Only Available for Items Initiated in iSupplier (eProcurement)*

# Admin Portal – General Information

**CITY OF CHICAGO** iSupplier Portal

[Home](#)
[Orders](#)
[Shipments](#)
[Admin](#)
[Finance](#)

[Home](#)
[Logout](#)
[Preferences](#)

[Navigator](#)
[Favorites](#)

**Profile Management**

- General**
- Company Profile
  - Organization
  - Address Book
  - Contact Directory

**General**

Organization Name **Chicago Test Vendor**      DUNS Number **1234567890**  
 Supplier Number **1021758**      FEIN **12-4356789**  
 Alias  
 Country of Tax Registration  
 Parent Supplier Name  
 Parent Supplier Number

**Attachments**

**Search**

Note that the search is case insensitive

Title

Show More Search Options

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete	Publish to Catalog
<a href="#">Insurance Certification Expires 2018.09</a>	File	General Liability	From Supplier		29-Sep-2017	One-Time			

# General Requirements

All Delegate Agencies are required to upload and maintain an active status for the following documents in the iSupplier portal:

- ❖ Articles of Incorporation
  - ❖ Insurance
- ❖ SAM Registration Status
- ❖ State Good Standing Letter
  - ❖ Board of Directors
- ❖ Financial Statements (updated annually)
- ❖ Cost Allocation Plan (*if indirect cost is included*)

# Admin Portal – Create User Accounts

CITY OF CHICAGO iSupplier Portal

Home Orders Shipments Admin Finance

Home Logout Preferences

Profile Management

- General
- Company Profile
  - Organization
  - Address Book
  - Contact Directory**
  - Business Classifications

Contact Directory : Active Contacts

Create

First Name	Last Name	Supplier Name	Phone Number	Email	Status	User Account	Addresses	Update
		DEBORAH'S PLACE			Current	✓		
		DEBORAH'S PLACE			Current			
		DEBORAH'S PLACE			Current			
		DEBORAH'S PLACE			Current	✓		
		DEBORAH'S PLACE			Current	✓		
Graylen	McClarn	DEBORAH'S PLACE	312-744-0358	grayeln.mcclarn@cityofchicago.org	Current	✓		
		DEBORAH'S PLACE			Current	✓		
Graylen	McClarn	DEBORAH'S PLACE		Graylen.McClarn@cityofchicago.org	Current	✓		

# Admin Portal – Create User Accounts

\* Indicates required field

Contact Title

\* First Name

Middle Name

\* Last Name

Alternate Name

Job Title

Department

Email Address

Url

\* Phone Area Code

\* Phone Number

Format: XXX-XXXX

Phone Extension

Alternate Phone Area Code

Alternate Phone Number

Fax Area Code

Fax Number

Inactive Date

(example: 26-Jun-2019 19:45:00)

## User Account

Create User Account for this Contact

\* Supplier Name

\* Username

**Users Must Create a Unique Username for Each Account Created**

## User Notifications

Certification Reminders

## Responsibilities

[Select All](#) | [Select None](#)

Select Responsibility	Application
<input checked="" type="checkbox"/> City of Chicago Online Bidding	Sourcing
<input checked="" type="checkbox"/> City of Chicago iSupplier Portal with Invoice Creation	iSupplier Portal

# Helpful Reminders and Tips

- Administration of Organizational Information – Maintain Updated and Accurate Information
- *Updating Agency Information and User Access –*
  - *Remember to Enter Email Address Before Granting Access to Organizational Users .*
  - *Assign Proper Responsibilities (Online bidding and/or Invoicing)*
- *When applying for one RFP with multiple components, a unique **Username** is required for each component, unless otherwise instructed by the City Department*
- *Deactivate Users when a person leaves the organization*
- *Create Internal Controls to Assign Proper Responsibilities*
- *Do Not Share Login Information and Passwords*

# Helpful Reminders and Tips

- *Sent from City's Address:*  
[WorkflowMailer@cityofchicago.org](mailto:WorkflowMailer@cityofchicago.org)
- *If Users do not receive email, check spam, blocked emails, or contact your organization's IT person for assistance*
- *If issue is not resolved, contact*  
[CustomerSupport@cityofchicago.org](mailto:CustomerSupport@cityofchicago.org)
- *Do not delete attachments*
- *Name all attachments properly*
- *Review FAQ's for additional information*

# Who to Contact for Assistance

- **Questions on Registration:**

[CustomerSupport@cityofchicago.org](mailto:CustomerSupport@cityofchicago.org) or (312)744-4357

- **iSupplier Technical Assistance for Delegate Agencies:**

[CustomerSupport@cityofchicago.org](mailto:CustomerSupport@cityofchicago.org) or (312)744-4357

- **Training Materials (Documents and Videos):**

<https://www.cityofchicago.org/city/en/depts/dps/isupplier/online-training-materials.html>



# Useful Links

## **City of Chicago Search Online:**

<http://webapps.cityofchicago.org/VCSearchWeb/org/cityofchicago/vcsearch/controller/agencySelection/begin.do>

## **Vendor/Delegate Agency Registration:**

<https://www.cityofchicago.org/city/en/depts/dps/isupplier/vendor-registration.html>

## **Funding Opportunities:**

<https://www.cityofchicago.org/city/en/depts/dps/isupplier/current-bids.html>

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