



CITY OF CHICAGO DELEGATE AGENCY

iSupplier (eProcurement) Workshop



Agenda

- ❖ Welcome and Introduction
- ❖ Overview of iSupplier (eProc)
- ❖ iSupplier Registration
 - ❖ Updating Organizational Information
 - ❖ Uploading Documentation
- ❖ RFP ('Creating a Quote') and Invoice Creation - Walk Through
 - ❖ View Admin Portal and Uploading Attachments
 - ❖ View Orders and Releases
 - ❖ Invoice Creation/Vouchering
 - ❖ View Payments

What is iSupplier (eProcurement)?

- **Effective: October 1, 2017**
- New Real-Time Online Purchasing System with Data Export
- *Replaces Existing Processes and Systems*
- **Required** for Doing Business with City of Chicago
- Full Service System Allows Agencies to:

Manage Delegate Agency Info.

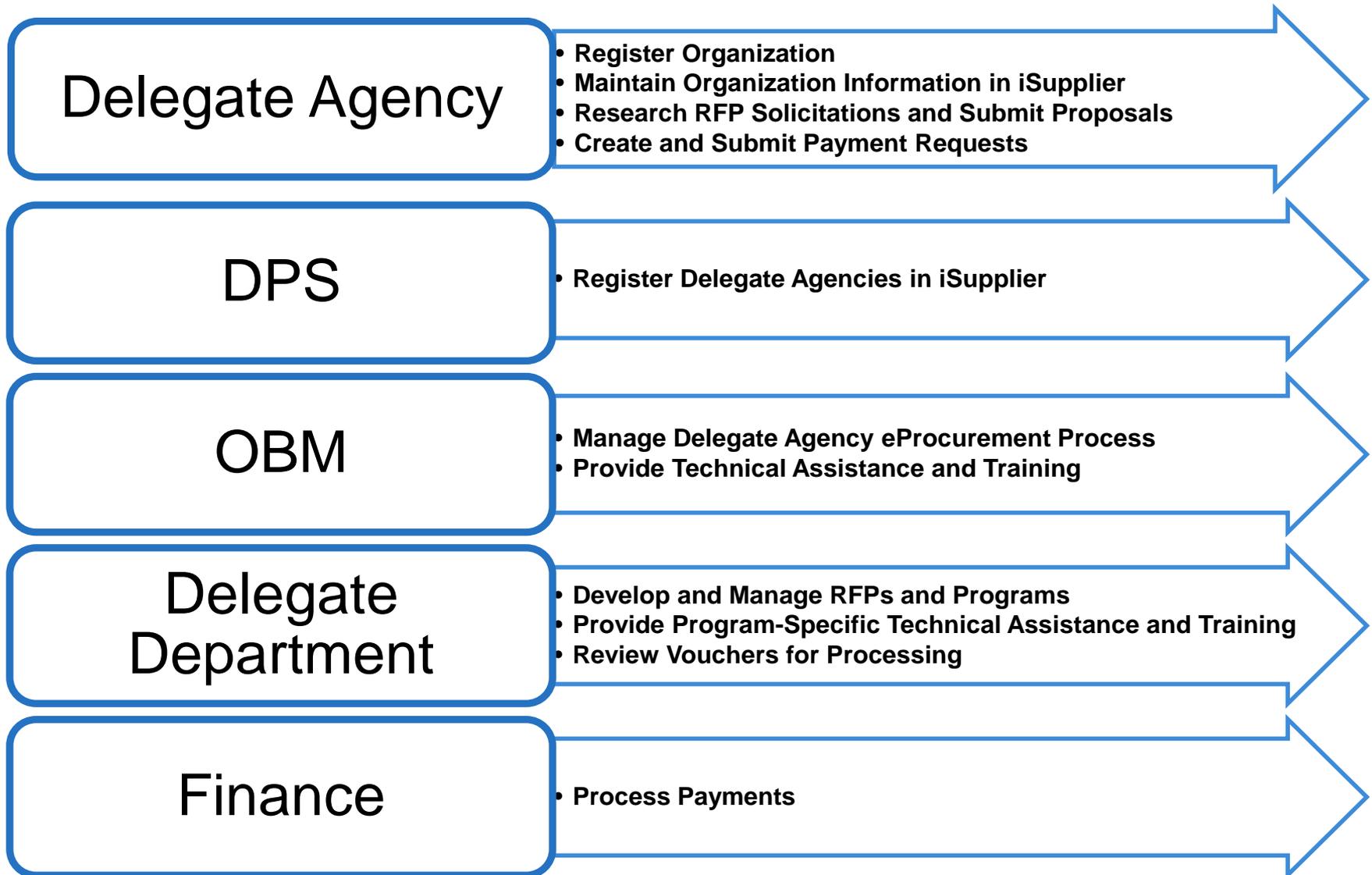
Review & Respond to Solicitations

Submit RFP

Submit Vouchers for Payment

Communicate with Departments

General Functions and Roles



Navigating the iSupplier Site



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 *and* Existing Delegate Agencies

[https://www.cityofchicago.org/city/en/depts/dps/isupplier/
endor-registration.html](https://www.cityofchicago.org/city/en/depts/dps/isupplier/vendor-registration.html)

Existing City of Chicago Vendors

If your business has previously registered with the City, had a contract (excluding subcontracts) with the City of Chicago, should follow the process directly below. The following are **NOT** included in this group:

- Vendors who have only had contracts with Sister Agencies, as opposed to with the City of Chicago. Agencies would not qualify for previous registration with the City of Chicago:
 - Chicago City Colleges
 - Chicago Housing Authority
 - Chicago Park District
 - Chicago Public Schools
 - Chicago Transit Authority
 - Metropolitan Pier & Exposition Authority (MPEA)
 - Public Building Commission
- Vendors who have done business only with Cook County, but not with the City of Chicago

In order to register your business in the City of Chicago iSupplier Portal, you will need to click on the subject “Request an iSupplier Invitation”, or click on the button below. Within the City of Chicago iSupplier Portal, you will find a link to the City of Chicago that provides a link to the iSupplier website and instructions for filling out and submitting the invitation.

[REQUEST ISUPPLIER INVITATION](#)

[How to register after receiving registration invitation](#)

New Vendors with the City of Chicago

Vendors who have never previously registered with the City of Chicago, never received a contract with the City of Chicago should follow this process. Click the New Vendor Registration page in the iSupplier Portal where you can complete the process.

If during registration you receive an error message stating that a supplier with the same business already has a City vendor number and you should follow the above “Request an iSupplier Invitation” process.

[NEW VENDOR REGISTRATION](#)

[How to Register](#)

NEW USER REGISTRATION ONLY

Company Details

At least one tax id is required to be able to complete the registration request.

* Company Name

Tax Country 

Where provided, the tax country will be used to validate the format of the Tax Registration Number and/or Taxpayer ID.

FEIN

Format: XX-XXXXXXX

DUNS Number

Contact Information

At least one contact is required for your company. Additional contacts may be added on the next page.

* Email

* First Name

* Last Name

* Phone Area Code

* Phone Number

Format: XXX-XXXX

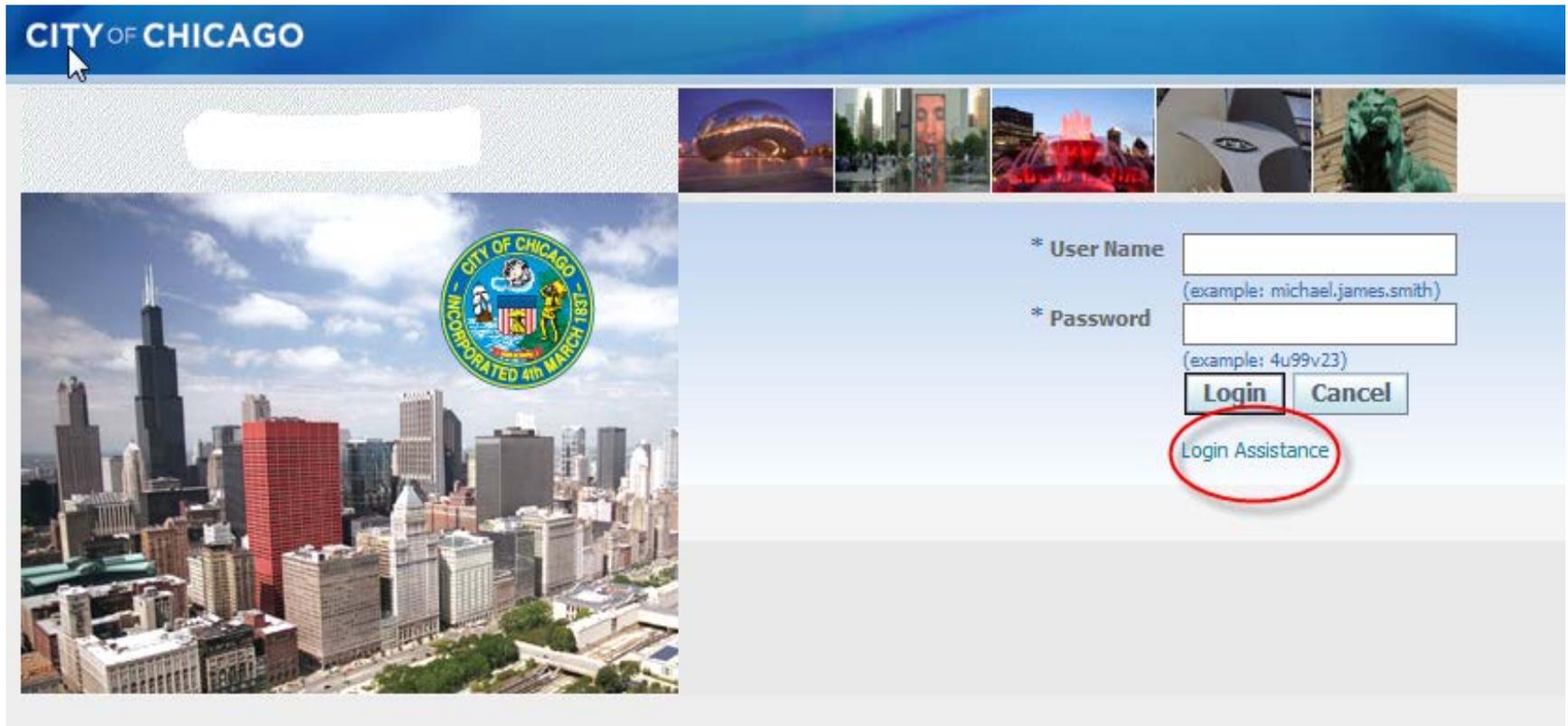
Phone Extension

- Add Attachments
- Users will receive the

ISUPPLIER PORTAL OVERVIEW

Login

- Self Management – Password Resets



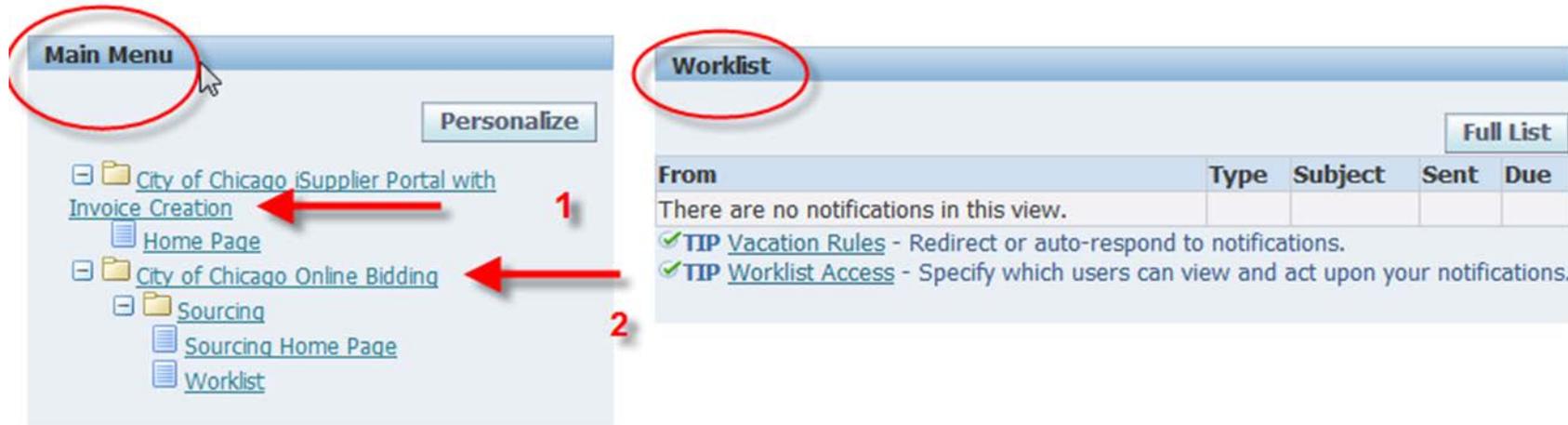
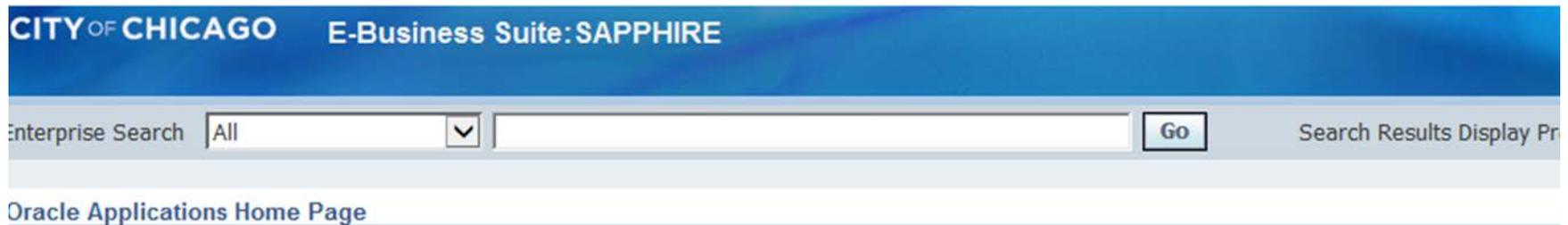
iSupplier Homepage

Main Menu:

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

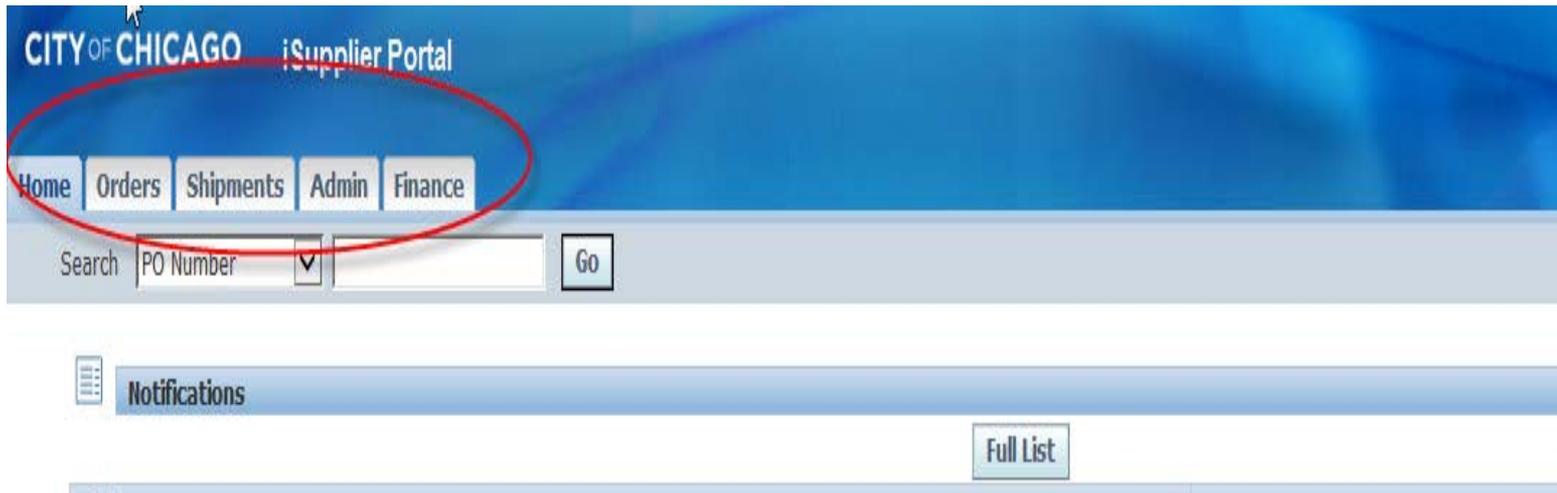
Worklist:

- RFP Draft
- 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

CITY OF CHICAGO iSupplier Portal

Home | Orders | Shipments | **Admin** | Finance

Home | Logout | Preferences

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
 Parent Supplier Name Country of Tax Registration
 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
Insurance Certification Expires 2018.09	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)
 - ❖ Most Recent Audit Information
 - ❖ Signature Authorizations
- ❖ Cost Allocation Plan (*if indirect cost is included*)

Orders - Contract and Release History

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

[Purchase Orders](#) | [Agreements](#) | [Purchase History](#) | [Work Confirmations](#)

Purchase Orders



Views

View

Data Export Available

Select Order:

Select	PO Number	Rev	Operating Unit	Document Type	Description	Order Date	Currency	Amount	Status
<input type="radio"/>	58759	0	CITY OF CHICAGO - GRE	Global Blanket Agreement	Benefits Assistance Services for Seniors	13-Jun-2017 15:10:57	USD	250,000.00	Open
<input type="radio"/>	58755	0	CITY OF CHICAGO - GRE	Global Blanket Agreement	Benefits Assistance Services for Seniors	13-Jun-2017 14:59:24	USD	250,000.00	Open
<input type="radio"/>	55403	0	CITY OF CHICAGO - GRE	Standard PO		20-Mar-2017 16:59:13	USD	2,000.00	Closed
<input type="radio"/>	43982-1	0	CITY OF CHICAGO - GRE	Blanket Release	CORP - YOUTH SERVICES - OUT OF SCHOOL TIME PROGRAMMING - YEAR ROUND	28-Feb-2017 17:28:56	USD	39,000.00	Open

Finance - View Payments

Create Invoices | View Invoices | **View Payments**

View Payments

Data Export Available

Simple Search

Note that the search is case insensitive

Payment Number

Invoice Number

PO Number

(example : 1234)

Release Number

(example : 1234-2)

Go

Clear

Status

Payment Amount From To

Payment Date From To

(example: 25-Jul-2017)

Payment	Remit-to Supplier	Remit-to Supplier Site	Payment Date ▼	Currency	Amount	Method	Status
10881587		B	01-May-2017	USD	6,265.00	Electronic	Reconciled
10878446		B	27-Mar-2017	USD	8,134.29	Electronic	Reconciled
10878321		A	24-Mar-2017	USD	2,000.00	Electronic	Reconciled
10876636		A	07-Mar-2017	USD	2,000.00	Electronic	Reconciled
10876271		B	01-Mar-2017	USD	2,659.00	Electronic	Reconciled
10874266		B	07-Feb-2017	USD	3,381.71	Electronic	Reconciled

BIDDING – RFP REVIEW

iSupplier Online Bids

Login

City of Chicago eProcurement Solicitations



Details

Document PDF File

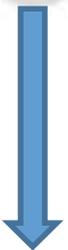
To view or download solicitations without logging in, click the icon at the Online Bid link, then click www.cityofchicago.org/eProcurement. For non-eProcurement bids, visit www.cityofchicago.org/bids to open. To sort the listing by a specific column, click on the desired column header. For registration to bid and more information, visit www.cityofchicago.org/eProcurement.

Abstracts

Status: Active

Department Name	Event	Program/Model Number	Solicitation Number	Specification Number	Solicitation Title	Advertisement Date	Supplier Response Start Date	Supplier Response Due Date	Protected Markets	Deadline for Questions	Details
DEPT OF STREETS & SANITATION	Commodities	36,3	131019		131019: INTERIOR, EXTERIOR PAINTS AND SUPPLIES	30-MAY-2017 08:00:00	30-MAY-2017 08:00:00	02-AUG-2017 11:00:00		16-JUN-2017 16:00:00	oo

Login



Delegate Agency

View and Respond to RFP

CITY OF CHICAGO Sourcing

Home Navigator Favorites

Negotiations

Negotiations >

Active Solicitations

Search

Note that the search is case insensitive

Number

Title

Category

Go Clear

Contact

Line

Event

Select Negotiation: Respond

Select	Number	Title	Contact	Time Left	Close Date	All Responses	Your Company's Responses
<input type="radio"/>	57	SMOKING CESSATION SERVICES FOR ADULTS	McGaughy, Ryan	402 days 16 hours	31-Aug-2018 10:57:45	Blind	0

[Return to Negotiations](#)

View All Attachments

Solicitation Number

Respond to RFP

The screenshot shows the City of Chicago Sourcing interface. At the top left, it says "CITY OF CHICAGO Sourcing". On the right, there are navigation links: "Home Logout Preferences Help". Below the header, there is a "Negotiations" tab and a breadcrumb trail: "Negotiations > Active Solicitations > RFQ: 57".

In the top right corner, there is an "Actions" menu with a dropdown arrow. The dropdown menu is open, showing "Create Quote" and a "Go" button. This entire area is circled in red.

The main content area displays the following information:

- Title: **SMOKING CESSATION SERVICES FOR ADULTS**
- Status: **Active**
- Time Left: **402 days 16 hours**
- Supplier Response Start Date: **21-Jul-2017 10:59:24**
- Bid Opening Date/Supplier Response Due Date: **31-Aug-2018 10:57:45**

Below this information, there are four tabs: "Header", "Lines", "Controls", and "Contract Terms". The "Header" tab is selected and circled in red.

At the bottom of the main content area, there is a section with the following details:

- Buyer: **McGaughy, Ryan**
- Quote Style: **Blind**
- Description: **SMOKING CESSATION SERVICES FOR ADULTS**
- Outcome: **Delegate Agency Blanket Agreement**
- Event: **Delegate Agency**

At the very bottom left, there is a "Terms" link.

Respond to RFP

Title SMOKING CESSATION SERVICES FOR ADULTS Time Left **402 days 16 hours**
 Bid Opening Date/Supplier Response Due Date **31-Aug-2018 10:57:45**

Header Lines

Supplier **KWM PADITS**
 RFQ Currency **USD**
 Quote Currency **USD**
 Price Precision **Any**

Quote Valid Until
(example: 24-Jul-2017)
 Reference Number
 Note to Buyer

Attachments

Title	Type	Description	Category	Last Updated By	Last Updated	Usage	Update	Delete
No results found.								

Requirements

[Expand All](#) | [Collapse All](#)

Focus Title	Target Value	Quote Value
<input type="checkbox"/> Requirements <input type="checkbox"/> Contact		
First Name		<div style="border: 1px solid gray; padding: 5px; min-height: 100px;"> <p style="text-align: center; font-weight: bold;">4,000 Text character Limit</p> </div>
Last Name		<div style="border: 1px solid gray; padding: 5px; min-height: 100px;"> </div>

Respond to RFP

Title SMOKING CESSATION SERVICES FOR ADULTS

Header		Lines	
Line	Update	Quote Price	Unit
1 0005 - Personnel		11200	USD
2 0044 - Fringe Ben...		1200	USD
3 0100 - Operating/...			USD
4 0140 - Profession...			USD
5 0200 - Travel			USD
6 0300 - Materials ...			USD
7 0400 - Equipment			USD
8 0801 - Indirect			USD
9 0999 - Other			USD

RFQ Currency **USD**
Price Precision **Any**

 Indicates more information requested. Click the Update icon to see more information on alternate bids, if applicable.

Electronic Signature



Electronic Signature

By submitting a bid/proposal/application and inputting his/her name and title, the person signing below certifies that he/she is authorized to submit this bid/proposal/application on behalf of the submitting party and warrants that all certifications and statements contained in the bid/proposal/application are true, accurate and complete as of the date furnished to the City. The person signing below understands that this submission will be binding on the submitting party.

* Name:

* Title:

* Indicates required fields. Before submitting the response please enter Name and Title and accept the disclaimer by checking the box above.

Cancel

Back

Validate

Save Draft

Printable View

Submit

Addendums and Notifications

- Addendum - Solicitation Number will be amended with a (zzzz,1)

Oracle Applications Home Page > Worklist >

Information
This notification has been closed and did not require a response.

Acknowledgement Required: Amendment 1 to RFQ 58 (SMOKING CESSATION SERVICES FOR ADULTS)

From	McGaughy, Ryan	Company	The City of Chicago
To	JANE DOE	Title	SMOKING CESSATION SERVICES FOR ADULTS
Sent	25-Jul-2017 13:42:15	Number	58,1
Closed	25-Jul-2017 13:43:06		
ID	97018347		

Responder

Negotiation Open **July 25, 2017 12:44 pm Central Time**
Negotiation Close **October 31, 2017 10:00 am Central Time**
Supplier **CITY OF CHICAGO TEST SUPPLIER**
Supplier Site

This Negotiation has been amended. To be considered for award you must acknowledge each amendment and resubmit your responses.

Please go to [Review Changes](#) page to review the changes for this amendment.

[Return to Worklist](#)

Display next notification after my response

INVOICE CREATION

Create Invoice Details

City of Chicago iSupplier Portal with Invoice Creation

1. The first step is to login to your account of iSupplier Portal.

Once logged in successfully, there will be a Main Menu on the left-hand side of the screen. Select “City of Chicago iSupplier Portal with Invoice Creation.”

CITY OF CHICAGO E-Business Suite:APSPROD

Enterprise Search All Go Search Results Display

Logged In As DENNIS.RONOWSKI@HEKTOE

Oracle Applications Home Page

Main Menu

Personalize

- City of Chicago iSupplier Portal
- City of Chicago iSupplier Portal with Invoice Creation
- City of Chicago Online Bidding

Worklist

Full List

From	Type	Subject	Sent	Due
There are no notifications in this view.				
✓ TIP Vacation Rules - Redirect or auto-respond to notifications.				
✓ TIP Worklist Access - Specify which users can view and act upon your notifications.				

Create Invoice Details (Cont.)

2. Once you have the PO/Release information, click on the “**Finance**” tab at the top of the screen. In the upper (and lower) right hand side of the Finance tab click the “**Go**” button to create an invoice with a PO/Release

The screenshot shows the City of Chicago iSupplier Portal interface. At the top, there is a navigation bar with the following elements:

- Home | Orders | Shipments | Admin | **Finance** (highlighted with a red box)
- Home | Logout | Preferences | Help
- Navigator | Favorites

Below the navigation bar, there is a sub-menu for the Finance tab:

- Create Invoices** (highlighted with a red box) | View Invoices | View Payments
- Invoice Actions (highlighted with a red box)

On the right side of the Finance tab, there is a "Create Invoice" button with a dropdown menu set to "With a PO" and a "Go" button (both highlighted with a red box).

The main content area is titled "Search" and includes a note: "Note that the search is case insensitive". The search form contains the following fields:

- Supplier: **Chicago Test Vendor**
- Invoice Number:
- Invoice Date From: (example: 16-Oct-2017)
- Invoice Status:
- Release PO Number:
- Invoice Amount:
- Invoice Date To:
- Currency:

A red text annotation "Leave this section blank" is placed over the Invoice Number, Invoice Date From, and Invoice Status fields.

At the bottom of the search form, there are "Go" and "Clear" buttons.

Below the search form is a table with the following columns: Invoice Number, Invoice Date, Invoice Currency Code, Invoice Amount, Release PO Number, Status, Withdraw, Cancel, Update, and View Attachments. The table currently shows "No search conducted."

At the bottom right of the page, there is another "Create Invoice" button with a dropdown menu set to "With a PO" and a "Go" button.

The footer of the page contains the text: "Home Orders Shipments Admin Finance Home Logout Preferences Help" and "Copyright (c) 2006, Oracle. All rights reserved."

Create Invoice Details (Cont.)

3. Enter the PO/Release information, click the “Go” button to create an invoice with a PO/Release

CITY OF CHICAGO iSupplier Portal

Home Logout Preferences Help

Navigator Favorites

Home Orders Shipments Admin Finance

Create Invoices View Invoices View Payments

Purchase Orders Details Manage Tax Review and Submit

Create Invoice: Purchase Orders

Cancel Step 1 of 4 Next

Search

Note that the search is case insensitive

Release PO Number x ⓘ

Release PO Date

(example: 15-Oct-2017)

Go Clear

Advanced Search

Enter PO and Release Number and Select GO

Select PO Number	Line Shipment	Advances or Financing	Item Description	Item Number	Supplier Item Number	Ordered	Received	Invoiced	UOM	Unit Price	Ship Curr To	Packing Organization	Slip	Waybill
No search conducted.														

Cancel Step 1 of 4 Next

Home Orders Shipments Admin Finance Home Logout Preferences Help

Create Invoice Details (Cont.)

4. The next screen will show all of the available lines on this agreement (PO/Release). Based on what you are vouchering for, **check the box** next to all the lines that apply. 0005 Personnel; 0044 Fringe Benefits; 0100 Operating Expenses, etc. Once the appropriate boxes have been checked, click on the “**Next**” button.

Search

Note that the search is case insensitive

Release PO Number: 31700

Release PO Date: (example: 10-Sep-2017)

Go Clear

Advanced Search

Select Items: Add to Invoice

Previous 1-10 Next 10

Select All Select None

Select	PO Number	Line	Shipment	Advances or Financing	Item Description	Item Number	Supplier Item Number	Ordered	Received	Invoiced	UOM	Price	Curr	Ship To	Organization	Packing Slip	Waybill
<input checked="" type="checkbox"/>	1200	1	1	<input type="checkbox"/>	0005 PERS/A1			84773	0	39545.23	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	1200	1	1	<input type="checkbox"/>	0005 PERS/A1			88292	0	86548.13	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	1200	1	1	<input type="checkbox"/>	0005 PERS/A1			85762.55	0	85762.55	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE		
<input checked="" type="checkbox"/>	1200	2	2	<input type="checkbox"/>	0044 FRINGE/A1			33909	0	15818.1	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	1200	2	2	<input type="checkbox"/>	0044 FRINGE/A1			35316	0	34619.19	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	1200	2	2	<input type="checkbox"/>	0044 FRINGE/A1			33447.38	0	33447.38	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE		
<input checked="" type="checkbox"/>	1200	3	4	<input type="checkbox"/>	0140 PROF TECH/A1			27218	0	1605	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	1200	3	4	<input type="checkbox"/>	0140 PROF TECH/A1			22725	0	22675	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	1200	3	3	<input type="checkbox"/>	0140 PROF TECH/A1			23619.75	0	23619.75	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE		
<input checked="" type="checkbox"/>	1200	4	5	<input type="checkbox"/>	0200 TRAVEL/A1			1500	0	0	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE		

Select Items: Add to Invoice

Previous 1-10 Next 10

Cancel Next

Create Invoice Details (Cont.)

4. Enter Required Invoice Information (See Next Page for Details):

CITY OF CHICAGO iSupplier Portal

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

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

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

[Create Invoices](#) | [View Invoices](#) | [View Payments](#)

Purchase Orders
Details
Manage Tax
Review and Submit

Create Invoice: Details

* Indicates required field

Cancel Back Step 2 of 4 Next

Supplier

* Supplier Chicago Test Vendor
 Tax Payer ID 12-4356789

A * Remit To A (EFT XX1234)

Address 123 ADAMS ST. SUITE 99 CHICAGO IL 60603

Invoice

B * Invoice Number 32010-4-17-01R

Invoice Date 17-Oct-2017
 Invoice Type Invoice
 Currency USD

C * Invoice Description 09/01/17-09/29/17 CC

D Date Good/Services Received 29-Sep-2017

E * Department Number 50
 DEPT OF FAMILY AND SUPPORT SERVICES

* Attachment [Attachment List...](#) [Add...](#)

Customer

Customer Tax Payer ID 36-6005820
 Customer Name CITY OF CHICAGO - GRE
 Address 121 NORTH LASALLE STREET Chicago 60602 US

Items

Release PO Number	Line	Shipment	Item Number	Item Description	Supplier Item Number	Ship To	Available Quantity	Quantity	Unit Price	UOM	Amount
32010-4	2	2		0005-PROGRAM-PERSONNEL		050-2005 FAMILY AND SUPPORT SERVICES	17994.33	17994.33	1	USD	17994.33
32010-4	3	3		0044-PROGRAM-FRINGS		050-2005 FAMILY AND SUPPORT SERVICES	5170.21	5170.21	1	USD	5170.21

Select 'Next' to continue or 'Back' to remove budget lines

Cancel Back Step 2 of 4 Next

Create Invoice Details (Cont.)

Remit To: Verify that the remit-to address and bank account detail for your institution is correct. It can be changed by selecting a different “remit to” site.

Invoice Number: This field is identified as a unique number assigned for tracking and billing purposes and applied in the system to avoid duplication of invoices.

a. **Conventional invoice** number consists of four elements: PO number-Release number-Expenditures covered year (2 digits)-Sequential number (2 digits), e.g., 33328-1-17-01.

b. **eProcurement invoice** number omits the PO number, and consists of three elements: Release Number-Expenditures covered year-Sequential number, e.g., 45672-17-01.

Invoice Description: Enter the period covered followed by the two letter program code. For example: **08/01/2017 – 08/31/2017 PH**. PH stands for “Public Health” program; RW stands for “Ryan White” program; SH stands for “Shelter” program; CC stands for “Childcare Program” YN stands for “Youth Net” program. If you do not know the program code, you may just enter the period covered with no program code.

Date Goods/Services Received: This will be the end date of the expenditure covered period in the format DD-MMM-YYYY. We recommend choosing the day from the calendar selector. Example:



Department Number: You can select the magnifying glass to see a list of department numbers, but common departments are: 41 Department of Health; 48 Mayor’s Office for People with Disabilities; 50 Family and Support Services; 54 Planning and Development; 57 Chicago Police Department; 70 Business Affairs and Consumer Protection.

Create Invoice - Attachments

Add Required Supporting Documentation

1. **Invoice Forms**: include Invoice Summary, Invoice Salary Expenditure Only, and Invoice Non-Personnel Expenditure Form (***Excel version only***).
 - a. Enter “Invoice” in the Title section
 - b. Attach Invoice copies

2. **Supporting Documentation “Support”**: e.g., Payroll Register Form, Invoice copy for non-personnel cost, etc.
 - a. Enter “Support” in the Title section
 - b. Attach supporting documentation copies

3. **Certifications**: e.g., Voucher Certification Form, Tax Payment Certification Form, etc.
 - a. Enter “Certificate” in the Title section
 - b. Attach certification copies

Create Invoice Details (Cont.)

5. Review and Submit Invoice

The next two screens are a chance for you to review and revise your invoice (if needed) before submitting it.

Supplier

- * Supplier: Chicago Test Vendor
- Tax Payer ID: 12-4296789
- * Remit To: A (EFF XX1234)
- Address: 123 ADAMS ST, SUITE 99 CHICAGO IL 60603
- Remit To Bank Account: XXXXXX69661
- Unique Remittance Identifier
- Remittance Check Dgt:

Invoice

- * Invoice Number: 32010-6-17-01R
- * Invoice Date: 17-04-2017
- Invoice Type: Standard
- * Currency: USD
- Invoice Description: 09/01/17-09/29/17 CC
- Date Good/Services Received: 29-Sep-2017
- Department Number: 50
- Web Disclosure Attachment: [Attachment List...](#)

Customer

- * Customer Tax Payer ID: 36-6005830
- Customer Name: CITY OF CHICAGO - GRE
- Address: 121 NORTH LASALLE STREET Chicago 60602 US

Summary Tax Lines

Calculate

Summary Tax Line Number Tax Regime Code Tax Status Code Tax Jurisdiction Code Tax Rate Code Tax Rate Tax Amount Line Status

No results found.

Items

PO Number	Line	Shipment	Item Description	Supplier Item Number	Ship To	Available Qty	Quantity To Invoice UOM	Unit Price	Amount
32010-4	2	2	0005-PROGRAM-PERSONNEL		050-2005 FAMILY AND SUPPORT SERVICES	17994.33	17,994.33 USD	1.00	17,994.33
32010-4	3	3	0044-PROGRAM-PRINCES		050-2005 FAMILY AND SUPPORT SERVICES	5170.21	5,170.21 USD	1.00	5,170.21

Shipping and Handling

Charge Type

No results found.

Invoice Summary

Items	23,164.54
Less Retainage	0.00
Freight	0.00
Miscellaneous	0.00
Tax	0.00
Recalculate Total	Total (USD)
	23,164.54

Remove Lines from Invoice

CITY OF CHICAGO iSupplier Portal Navigator Favorites Home Logout Preferences

Home Orders Shipments Admin Finance

Create Invoices View Invoices View Payments

Purchase Orders **Details** Manage Tax Review and Submit

Create Invoice: Details Cancel Back Step 2 of 4 Next

* Indicates required field

Supplier

* Supplier **Chicago Test Vendor**
 Tax Payer ID **12-4356789**
 * Remit To **A (EFT XX1234)**
 Address **123 ADAMS ST. SUITE 99 CHICAGO IL 60603**

Invoice

* Invoice Number **12345-4-17-03R**
 Invoice Date **15-Oct-2017**
 Invoice Type **Invoice**
 Currency **USD**
 * Invoice Description **09/01-17 - 09/29/17 CR**
 Date Good/Services Received **29-Sep-2017**
 * Department Number **50**
 DEPT OF FAMILY AND SUPPORT SERVICES
 * Attachment **None Add...**

Customer

Customer Tax Payer ID [redacted]
 Customer Name **CITY OF CHICAGO - GRE**
 Address **121 NORTH LASALLE STREET Chicago 60602 US**

Items

Release PO Number	Line	Shipment	Item Number	Item Description	Supplier Item Number	Ship To	Available Quantity	Quantity	Unit Price	UOM	Amount
7-4	10	10		0300-PROGRAM-MATERIALS/SUPPLIES		050-2005 FAMILY AND SUPPORT SERVICES	6537	1500	1	USD	1500

To remove a line, select Back and Remove Line from Invoice

Cancel **Back** Step 2 of 4 Next

Remove Lines from Invoice

CITY OF CHICAGO iSupplier Portal

Home Orders Shipments Admin Finance Navigator Favorites Home Logout Preferences Help

Create Invoices View Invoices View Payments

Purchase Orders Details Manage Tax Review and Submit

Create Invoice: Purchase Orders Cancel Step 1 of 4 Next

Search

Note that the search is case insensitive

Release PO Number ?

Release PO Date (example: 15-Oct-2017)

Go Clear Advanced Search

Select Items: Add to Invoice Previous 1-10 Next 10

Select	PO Number	Line	Shipment	Advances or Financing	Item Description	Item Number	Supplier Item Number	Ordered	Received	Invoiced	UOM	Unit Price	Curr	Ship To	Organization	Packing Slip	Waybill
<input type="checkbox"/>	2	1	1	<input type="checkbox"/>	(1-SDOP) 0005-PERSONNEL			37785	0	37785	USD	1	USD	052-2505 CHL YTH SRV	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	2	2	2	<input type="checkbox"/>	(1-SDOP) 0044-FRINGE BENEFITS			5058	0	5058	USD	1	USD	052-2505 CHL YTH SRV	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	2	8	8	<input type="checkbox"/>	(2-BC) 0005-PERSONNEL			28050	0	28050	USD	1	USD	052-2505 CHL YTH SRV	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	2	9	9	<input type="checkbox"/>	(2-BC) 0044-FRINGE BENEFITS			6171	0	6171	USD	1	USD	052-2505 CHL YTH SRV	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	2	10	10	<input type="checkbox"/>	(2-BC) 0100-OPERATING AND TECHNICAL			3600	0	3600	USD	1	USD	052-2505 CHL YTH SRV	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	2	12	12	<input type="checkbox"/>	(2-BC) 0300-MATERIALS AND SUPPLIES			156.08	0	156.08	USD	1	USD	052-2505 CHL YTH SRV	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	2	14	14	<input type="checkbox"/>	(2-BC) 0900-OTHER			1422	0	1422	USD	1	USD	052-2505 CHL YTH SRV	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	3	15	15	<input type="checkbox"/>	(3-BP) 0005-PERSONNEL			31932	0	31932	USD	1	USD	052-2505 CHL YTH SRV	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	3	16	16	<input type="checkbox"/>	(3-BP) 0044-FRINGE BENEFITS			7025	0	7025	USD	1	USD	052-2505 CHL YTH SRV	CITY OF CHICAGO - GRE		
<input type="checkbox"/>	3	17	17	<input type="checkbox"/>	(3-BP) 0100-OPERATING AND TECHNICAL			2898	0	2898	USD	1	USD	052-2505 CHL YTH SRV	CITY OF CHICAGO - GRE		

Select Items: Add to Invoice Previous 1-10 Next 10

Purchase Order Items Added to Invoice

Select Items: Remove from Invoice

Select All | Select None

Select	PO Number	Line	Shipment	Item Description	Item Number	Supplier Item Number	Ordered	Received	Invoiced	UOM	Unit Price	Curr	Ship To	Organization
<input type="checkbox"/>	2	4	10	0300-PROGRAM-MATERIALS/SUPPLIES			11537	0	5000	USD	1	USD	050-2005 FAMILY AND SUPPORT SERVICES	CITY OF CHICAGO - GRE

Cancel Step 1 of 4 Next

Cancel Invoice

- Search for All Invoices, Under **Finance** tab, Select **“GO”**
- **Cancelling an Invoice will release the funds reserved in the voucher**

The screenshot shows the City of Chicago iSupplier Portal. The top navigation bar includes 'Home', 'Orders', 'Shipments', 'Admin', and 'Finance' (highlighted with a red box). Below this, there are links for 'Create Invoices', 'View Invoices', and 'View Payments'. A secondary navigation bar contains 'Invoice Actions' (highlighted with a red box). On the right side of the page, there is a 'Create Invoice' button with a dropdown menu set to 'With a PO' and a 'Go' button.

The main content area is titled 'Search' and includes a note: 'Note that the search is case insensitive'. The search form contains the following fields:

- Supplier: **Chicago Test Vendor**
- Invoice Number:
- Invoice Date From: (with a calendar icon)
- Invoice Status: (with a dropdown arrow)
- Release PO Number:
- Invoice Amount:
- Invoice Date To: (with a calendar icon)
- Currency:

Below the search fields are 'Go' and 'Clear' buttons, both highlighted with red boxes. At the bottom of the search area, there is a table with the following columns: Invoice Number, Invoice Date, Invoice Currency Code, Invoice Amount, Release PO Number, Status, Withdraw, Cancel, Update, and View Attachments. The table currently displays 'No search conducted.'

At the bottom right of the page, there is another 'Create Invoice' button with a dropdown menu set to 'With a PO' and a 'Go' button.

Cancel or Edit Invoice (Cont.)

- Invoice History will appear; Select the Invoice to Edit or Cancel

CITY OF CHICAGO iSupplier Portal

Home | Orders | Shipments | Admin | Finance

Navigator | Favorites | Home | Logout | Preferences | Help

Create Invoices | View Invoices | View Payments

Invoice Actions

Create Invoice With a PO

Search

Note that the search is case insensitive

Supplier **Chicago Test Vendor**

Invoice Number

Invoice Date From (example: 16-Oct-2017)

Invoice Status

Release PO Number

Invoice Amount

Invoice Date To

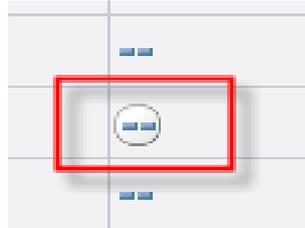
Currency

Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Release PO Number	Status	Withdraw	Cancel	Update	View Attachments
32010-4-17-155	31-Aug-2017	USD	16,755.00	32010-4	In Process		...		
32010-1-17-01	11-Oct-2017	USD	300.00	32010-4	In Process		...		
32010-4-17-1999	25-Sep-2017	USD	10,000.00	32010-4	In Process		...		
32010-4-17-01R3	29-Sep-2017	USD	1,600.00	32010-4	In Process		...		
32010-4-17-01R4	29-Sep-2017	USD	200.00	32010-4	In Process		...		
32010-4-17-1122233	06-Oct-2017	USD	1,700.00	32010-4	In Process		...		
32010-1-17-19	06-Oct-2017	USD	100.00	32010-4	Unsubmitted				
32010-4-17-40	31-Aug-2017	USD	2.00	32010-4	In Process		...		
8yr3oihf	06-Oct-2017	USD	0.00	32010-4	Cancelled		...		
32010-4-001	31-Aug-2017	USD	1.00	32010-4	In Process		...		

Previous 1-10 Next 10

Cancel or Edit Invoice (Cont.)

Cancel Icon 



CITY OF CHICAGO iSupplier Portal

Home | Orders | Shipments | Admin | **finance**

Create Invoices | View Invoices | View Payments

Invoice Actions

Create Invoice With a PO

Search

Note that the search is case insensitive

Supplier **Chicago Test Vendor**

Invoice Number

Invoice Date From (example: 16-Oct-2017)

Invoice Status

Release PO Number

Invoice Amount

Invoice Date To

Currency

Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Release PO Number	Status	Withdraw	Cancel	Update	View Attachments
32010-4-17-155	31-Aug-2017	USD	16,755.00	32010-4	In Process				
32010-1-17-01	11-Oct-2017	USD	300.00	32010-4	In Process				
32010-4-17-1999	25-Sep-2017	USD	10,000.00	32010-4	In Process				
32010-4-17-01R3	29-Sep-2017	USD	1,600.00	32010-4	In Process				
32010-4-17-01R4	29-Sep-2017	USD	200.00	32010-4	In Process				
32010-4-17-1122233	06-Oct-2017	USD	1,700.00	32010-4	In Process				
32010-1-17-19	06-Oct-2017	USD	100.00	32010-4	Unsubmitted				
32010-4-17-40	31-Aug-2017	USD	2.00	32010-4	In Process				
8yr3oihf	06-Oct-2017	USD	0.00	32010-4	Cancelled				
32010-4-001	31-Aug-2017	USD	1.00	32010-4	In Process				

Previous 1-10 Next 10



Post Invoice Submission

Delegate Agencies have an obligation to regularly check the invoice status and take an appropriate action accordingly.

Post Invoice Submission (cont'd)

A. Rejection

1. Under the following circumstances, an Invoice may be Rejected:
 - a. Incorrect Payment Site selected
 - b. Incorrect Date Goods/Services Received
 - c. Incorrect Release matched
 - d. the expenditures covered in the two-year period
 - e. Other

2. Delegate Agencies have an obligation to follow up with the Rejection Notification and take an appropriate action to fix the root cause for Rejection accordingly.

3. When delegate agency resubmits the rejected invoice, the original invoice number should be used and followed by a suffix “R”. For example, **45672-17-01R**.

Contract Amendment & Budget Revision Submission

- **Pre eProcurement**
- Submit via Hard Copy or Email to User Department
- **Post eProcurement**
- Submit via Online Discussions in iSupplier Portal

Major Changes for Current vs. New Contracts

Pre-eProcurement

1. Budget Revisions and Amendments **Must be Sent** via Email to User Department
 2. Invoice Number Requirements **Must Have** (PO#, Release#, Year, Voucher#)
 3. Invoice Description **Must Have** Program Suffix (i.e. “CR” for Community Receiver)
-

Post-eProcurement

1. Budget Revisions and Amendments **Must be Sent** via Online Discussion
2. Invoice Number Requirements **Must Have** (New Release#, Year, Voucher#)
3. Invoice Description **Must Have** Program Suffix (i.e. “CR” for Community Receiver)

Helpful Tips and Lessons Learned

1. Use Internet Explorer Browser
2. Enable Pop-Ups and Check Internet Security Settings
3. Check Email Spam/Junk Mail box for City of Chicago Mailer notifications
4. Check Attachment Submissions Prior to Submitting
5. Administration of Organizational Information – Maintain Updated and Accurate Information
6. Avoid clicking the Back/Forth browser buttons – Navigate within iSupplier portal
7. Save Often
8. Invoice Number Must be Unique

Who to Contact for Assistance

- **Questions on Registration:**

eprocsupport@cityofchicago.org

- **eProcurement for Delegate Agencies:**

OBMGMU@cityofchicago.org

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

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

- **Vendor/Delegate Agency Registration:**

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

Useful Links

City of Chicago Search Online:

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

Funding Opportunities:

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

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