

**Delegate Agency  
iSupplier Training Guide and  
Frequently Asked Questions  
(eProcurement)**

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## 1.1 OVERVIEW AND PURPOSE

**eProcurement** (iSupplier) is the City of Chicago’s online purchasing and contracting system used by vendors and Delegate Agencies. All Delegate Agencies seeking to do business with the City must register and submit information through this online purchasing system. **Failure to register** will impact the Delegate Agency’s ability to conduct business with the City of Chicago.

eProcurement (iSupplier) is a full-service purchasing system that allows Delegate Agencies to:

- Manage Delegate Agency information and account details
- Review and respond to RFP solicitations (“Quotes”) & upload required Information
- Submit RFP’s
- Submit payments/Vouchers
- Communicate with Departments



*Agencies are encouraged to develop and maintain policies and procedures governing the use of grant fund. The policy should include instructions on the use of the City’s iSupplier system and internal controls regarding system access, responsibilities, and security.*

### 1.1.1 Question: Is iSupplier used for all City of Chicago’s procurement?

**Answer:** Yes. The iSupplier system is used for all of the City’s procurement, which includes vendor contracting and Delegate Agency contracting.

### 1.1.2 Question: When was the system implemented?

**Answer:** As of October 1, 2017, all delegate agencies are required to register and manage all procurement and payments through the iSupplier (eProcurement) portal.

## 1.2 GENERAL REGISTRATION

### 1.2.1 Question: How do I register my agency?

**Answer:** Agencies can register at: [iSupplier Registration \(https://www.chicago.gov/city/en/depts/dps/isupplier/login-register.html\)](https://www.chicago.gov/city/en/depts/dps/isupplier/login-register.html). Scroll to the bottom of the page until you see the **Login/Registration** icon. Once opened, click on registration option and select the link that pertains to your organization (**New or Existing**) and follow the instructions provided.

### 1.2.2 Question: How will I know if I am a **New or Existing Vendor/Customer**?

**Answer:** New Vendors with the City of Chicago are companies/organizations that have never received a vendor code/supplier code, have never received a contract, and/or have never received any payment from the City of Chicago.

Existing vendors/customers of the City of Chicago are companies/organizations that have previously contracted with the City and/or have received payment from the City

prior to 2017. Existing agencies are required to request an iSupplier invitation in order to initiate the registration process. Please see below for the registration link.

***If you require additional assistance, please use the link below that provides instructions on completing the registration process:***

[https://www.cityofchicago.org/content/dam/city/depts/dps/isupplier/training/Vendor\\_Registration.pdf](https://www.cityofchicago.org/content/dam/city/depts/dps/isupplier/training/Vendor_Registration.pdf)

**1.2.3 Question: How do I accept an Invitation?**

**Answer:**

The Department of Procurement Services (“DPS”) will send an email notification, which will include a username and temporary password. Users will be prompted to change the password and create a new password. Please make sure to check the spam or junk mail if a notification is not received within three days. If you have not received the email after verifying the previous step, please contact

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

**Please note:** The system generates a temporary password, which is embedded in the sentence. Users are cautioned, if using the copy and paste function, not to copy the period “.” included at the end of the sentence. Please do not include period “.” in the entry of your password in the **Password** login field or **Current Password** field when resetting your password under **Preferences**.

***If you require additional assistance, please use the link below that provides instructions on replying to a Registration Invitation Email:***

[https://www.chicago.gov/content/dam/city/depts/dps/isupplier/training/Vendor\\_Reply\\_to\\_Registration\\_Invitation\\_email.pptx](https://www.chicago.gov/content/dam/city/depts/dps/isupplier/training/Vendor_Reply_to_Registration_Invitation_email.pptx)

**1.2.4 Question: How can I reset or change my password?**

**Answer:**

On the login screen, click the Login Assistance button to re-set your username or password, you should receive instructions for resetting your password Workflow Mailer notification, which is a system generated email. Click here to access the Login Assistance ([Password and Username Assistance](#)).

Users can change their password using the **Preferences** option on the **Homepage** in iSupplier. Users are discouraged from modifying any additional information under **Preferences**, as this may impact the messenger notification receipt feature and functionality for the user. The notification emails will be sent from [Workflowmailer@cityofchicago.org](mailto:Workflowmailer@cityofchicago.org).

If users do not receive the workflow notification, users are instructed to check spam or email security preferences that may block certain emails coming from external sources. Users should explore these options as well as contacting their internal technical support organizations prior to contacting at:

[CustomerSupport@cityofchicago.org](mailto:CustomerSupport@cityofchicago.org) for assistance.

**1.2.5 Question: Can multiple people register the same organization?**  
**Answer:** No. An Organization can only have one account in the eProcurement system. It is linked using the organizations Federal Employer Identification Number (FEIN). Delegate Agencies are responsible for adding and/or deactivating users from an organization’s account in iSupplier. Please click the link for additional instructions on the registration process:  
[https://www.cityofchicago.org/content/dam/city/depts/dps/isupplier/training/Vendor Create New Address and Contact.pdf](https://www.cityofchicago.org/content/dam/city/depts/dps/isupplier/training/Vendor%20Create%20New%20Address%20and%20Contact.pdf)

**1.2.6 Question: Why did my organization require Vendor Merging?**  
**Answer:** Vendor an organization requires a merger when an organization has multiple vendor code accounts with the City of Chicago. When that occurs, all the vendor contracts connected to the various accounts, must be merged into one, which will link all prior vendor accounts and associated contracts into one single account.

**Click below for a visual presentation on the iSupplier system**

### **Delegate Agency iSupplier Overview**



City of Chicago  
Delegate Agency iSu

## **1.3 MANAGE ADMINISTRATION AND PROFILE**

**1.3.1 Question: How to create and maintain user accounts?**  
**Answer:** Agencies can add and assign responsibilities or remove users from an agency’s account by navigating to the **Admin** tab under the **City of Chicago iSupplier Portal with Invoice Creation**. On the left navigation section, under **Company Profile**, select **Contact Directory** and select one of the following:

- Select **Create** to add a new user
- Select **Update** to inactivate a user

Organizations are responsible for deactivating users when an employee leaves an and reassigning responsibilities as necessary.

*If you require additional assistance, please use the link below that provides instructions on adding and removing users:*

[https://www.chicago.gov/content/dam/city/depts/dps/isupplier/training/Vendor Create New Address and Contact.pdf](https://www.chicago.gov/content/dam/city/depts/dps/isupplier/training/Vendor%20Create%20New%20Address%20and%20Contact.pdf)

**1.3.2 Question: Can I give View only access to members of my organization?**  
**Answer:** No. Currently, there are only two responsibilities:

**1) City of Chicago iSupplier Portal with Invoice Creation** manages the organizations administrative information and submit payment vouchers and;

**2) City of Chicago Online Bidding** manages solicitations. Delegate Agencies must identify and assign the appropriate responsibilities to authorized users of the organization.

Users can only grant access to folders that are available to the user. For example, if a user only has one folder (i.e. City of Chicago iSupplier Portal with Invoice Creation), the user can only grant access to the City of Chicago iSupplier Portal with Invoice Creation and vice versa. If a user only has access to one folder and requires access to both folders, users are instructed to notify their internal executives/managers to grant access. If additional assistance is required, users should contact [CustomerSupport@cityofchicago.org](mailto:CustomerSupport@cityofchicago.org) and request access to required folders.

**1.3.3 Question: What if I accidentally inactivate an existing contact?**

**Answer:** The system will not allow users to re-activate a user's login. You must create a new account for the user or contact the City's system administrators for assistance. *Navigation steps for creating a new account:* Under in Menu, select the folder named **City of Chicago iSupplier Portal with Invoice Creation**. Select the **Admin tab** and select **Contact Directory** and select the **Create** option and re-enter the users information as a new contact. If the agency requires to reactivate a user with the same username as previously established, contact [CustomerSupport@cityofchicago.org](mailto:CustomerSupport@cityofchicago.org).

**1.3.4 Question: What happens if the person(s) managing my agency's account leaves and no one else can access the Agency's account?**

**Answer:** [CustomerSupport@cityofchicago.org](mailto:CustomerSupport@cityofchicago.org) will assist in creating and /or granting an account to access the Agency's profile. Delegate Agency must provide information confirming status and authorization from the Agency's Board or Executive Officer. Contact [CustomerSupport@cityofchicago.org](mailto:CustomerSupport@cityofchicago.org) for further requirements.

If you are uncertain if an account has been created for you, contact [CustomerSupport@cityofchicago.org](mailto:CustomerSupport@cityofchicago.org)

**1.3.5 Question: What is the general required documentation and where do I add the attachments?**

**Answer:** Standard required documents are Articles of Incorporation, Insurance, SAM Registration Status, State Good Standing Letter, Board of Directors, Financial Statements (updated annually), Most Recent Audit Information, Signature Authorizations and Cost Allocation Plan (if indirect cost is included). A list of required documentation and any updated requirements or materials are also available on the following website:

<https://www.cityofchicago.org/city/en/depts/dps/isupplier/delegates.html>

Attachments can be uploaded using the following instructions: Log into iSupplier and navigate to the folder named **City of Chicago iSupplier Portal with Invoice Creation**, under the **Main Menu** section. Select the **Admin tab** and select **General Information** and scroll down to **Add Attachments**. Add attachments. Delegate Agencies are required to maintain active and updated organizational information, which could impact contractual negotiations and/or delay the release of payments.



You can update your agency's information by selecting the folder under the Main Menu option for City of Chicago iSupplier Portal with Invoice Creation. When you select this folder, a new form will appear. The new form will have an Admin tab on the top. The Admin section, under General, is where you can upload your required attachments.

[https://www.cityofchicago.org/content/dam/city/depts/dps/isupplier/training/Vendor Create New Address and Contact.pdf](https://www.cityofchicago.org/content/dam/city/depts/dps/isupplier/training/Vendor%20Create%20New%20Address%20and%20Contact.pdf)

Please note that the City Department may require additional information, which should be uploaded as instructed.

**1.3.6 Question:**  
**Answer:**

**Is there a standard naming convention for attaching files?**

Yes. All attachments should be properly named to facilitate the processing of requests submitted by our Delegate Agencies; documents with expiration dates should include the expiration date at the end of the file name.

**Please note:** *Some City departments may have specific requirements, please contact the contracting department for additional instructions on requirements in this area.*

**Suggested naming conventions, in BOLD:**

- **Articles of Incorporation (PDF)**
- **State of Good Standing Letter (PDF)**
- **Board of Directors (PDF)**
- **SAM Registration Status (PDF)**
- **Financial Statements (updated annually) (PDF)**
- **Certificate of Insurance XX/XX/20XX (indicate earliest expiration date if more than one coverage period) (PDF)**
- **Signature Authorization PO12345 REL 1 (indicate associated PO Number and/or Release Number) (PDF)**
- **Cost Allocation Plan Fiscal Year 20XX (required if budgeting for indirect cost and must include Federal Authorization) (PDF)**
- **Electronic Funds Transfer Request (PDF)**
- **Audit Communication letter dated XX/XX/20XX (indicate date of correspondence) (PDF)**

**Suggested naming conventions, in bold, for Contract Documents:**

- **Budget Document** – Excel file format
- **Work Plan (Scope of Work)** – Word or Pdf file format

**Suggested naming conventions, in bold, for Invoice documents:**

- **Invoice** – Excel format (includes summary, personnel, and non-personnel)
- **Support** – Pdf format (support may include but not limited to payroll register, ADP payroll register summary, time sheets for hourly workers, receipts, vendor invoices for non-personnel cost over \$5,000)
- **Certification** – Pdf format (includes Invoice Certification Form, Payroll Certification Form, and/or Fee for Service Certification Form. if applicable)

**1.3.7 Question: What should I do when my organizations required General Information expire (I.e. Insurance, SAM, or State of Illinois Good Standing).**

**Answer:** Delegate Agencies are required to upload updated information in iSupplier and should not remove expired information from the system. Agencies are required to maintain all updated information in the iSupplier portal and should **add/upload the** new document and renaming the document appropriately and including the appropriate expiration date.

**Reminder:** Expired information should not be removed/deleted. It is recommended for documents that expire, that a date extension is added to the document description. Delegate Agencies are discouraged from deleting historic information stored in iSupplier.

**1.3.8 Question: What is SAM?**

**Answer:** The System for Award Management (SAM) registration is required for agencies to manage and maintain an active DUNS. When you update your agency's profile information, the system will acknowledge your updated information and provide a valid through date. This indicates that your agency's registration is active. You can access the SAM website at: <https://www.sam.gov>.

**1.3.9 Question: What is the Business Classification Section Under the Admin Tab?**

**Answer:** Certifications and Reminders Form - This new process will alert the Department of Finance Insurance section when Delegate Agencies (DA's) update their insurance coverages in eProcurement. It is important to emphasize that DA's should be uploading their most current active certificate of insurance.

#### **1.4 FINDING A SOLICITATION ON THE EPROCUREMENT WEBSITE AND ONLINE TRAINING MATERIAL**

**1.4.1 Question: What is the eProcurement website used for?**

**Answer:** Training Material is available on the eProcurement and provides tutorials that will guide you through various processes associated with iSupplier, including, but not limited to online bidding and Invoice Creation. Make sure to choose Delegate Agency Training Material for additional information on specific requirements for Delegate Agencies.

***If you require additional assistance, please use the link below that provides instructions on adding and removing users:***

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

**1.4.2 Question: How will I know when there are training opportunities?**

**Answer:** OBM hosts monthly trainings on general administration, responding to an RFP, and submitting invoices. Training dates are posted on the eProcurement website and are updated to reflect all training dates hosted by OBM. The website will direct users to sign up for training, where you can reserve your space for training. Attendees are encouraged to bring personal devices to the training.

The eProcurement Training opportunities are posted at:

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

In addition, departments host separate trainings and technical assistance sessions, which will be communicated by the individual department, as scheduled. Please contact your contracting City department regarding department-specific training.

**1.4.3 Question: Where can I find new Request for Proposals (RFP), also referred to as Solicitations, Quotes, or Bid Opportunities?**

**Answer:** All RFP's are available on the following website:  
[https://eprocurement.cityofchicago.org/OA\\_HTML/OA.jsp?OAFunc=PON\\_ABSTRACT\\_PAGE&PON\\_NEGOTIATION\\_STATUS=ACTIVE](https://eprocurement.cityofchicago.org/OA_HTML/OA.jsp?OAFunc=PON_ABSTRACT_PAGE&PON_NEGOTIATION_STATUS=ACTIVE)  
Users can filter by **Event Type**, and search for Delegate Agency opportunities. Users can also view Active, Awarded, Closed, Cancelled solicitations.

**1.4.4 Question: Do I have to be registered to find a bid opportunity and view attachments?**

**Answer:** Users are not required to log into the system to search for and view an opportunity and other PDF documents. However, users who log in into the system will have access to additional non-PDF documents and will have the ability to respond and submit proposals.

**1.4.5 Question: After I have logged into the eProcurement system, how can I search for the RFP that I want to respond to?**

**Answer:** From the Sourcing homepage, under the **Search Open Solicitations** section, Users can select from the dropdown list to filter search options; the dropdown list includes options to search by Title, Number, Event, etc. If a user does not have the exact number or name of a solicitation, Users can enter a percent sign ("%") and/or enter a partial value with the percent sign ("%") to search for a solicitation.

## **1.5 ONLINE BIDDING: HOW TO RESPOND TO AND SUBMIT AN RFP**

**1.5.1 Question: What are the components of the iSupplier Solicitation?**

**Answer:** The Delegate Agency solicitations consist of three sections:

- 1) Header and Attachment**
- 2) Lines**
- 3) Review/Submit**

The **Header** section details the requirements (**Questions**) of the RFP/solicitation and allows the agencies to submit responses and required documentation to support the proposal. The documentation is in addition to the centralized General requirements, which must be uploaded under the agency's Admin section of the iSupplier portal. There is a 4000-text limitation (including spaces and special characters) to each requirements section, unless the response is a drop-down selection. Agencies are also required to upload **Attachments** under the Header section.

The **Lines** section requires the agency to enter the amount (**Quantity**) desired on the appropriate line account. If an amount is not desired, the user must leave the field blank. Do not enter a \$0 or any special characters (i.e. commas); the amount must be entered as a whole number. The desired budget is the amount requested from the City. The agency must also submit/attach a detailed Excel budget, provided by the city

department. The agency's summary line budget should match the Excel summary budget.

**Review and Submit** section require the agency to review the solicitation, acknowledge the City's certification requirements, electronically, and submit the solicitation. The agency can elect to print the solicitation prior to submission. After the solicitation has been submitted, the system will generate a confirmation message with a Response Number.

**1.5.2 Question: How do I review an RFP and Attachment?**

**Answer:** Under Online Bidding, Select Sourcing, and Sourcing Homepage. The system will open the **Negotiations** page. Under the **Search** Open Solicitations Option, Select Number from the drop-down list and enter the RFP number. Select the RFP and press Go. This will place you in view only, which will allow you to see the Requirements, Lines and Attachments until you take further action.

**1.5.3 Question: How do I respond to an RFP? (Create a Quote)**

**Answer:** Under the **City of Chicago Online Bidding** folder, Select **Sourcing**, and **Sourcing Homepage**. The system will open the **Negotiations** page. Under the **Search Open Solicitations** Option, select Number from the drop-down list and enter the RFP number. Once the RFP appears, select the RFP by selecting the radio button and click **Respond**. The system will navigate the user to a **Terms and Conditions** page. The user is instructed to review the terms and conditions and click the checkbox to accept the terms and conditions. Once the terms and conditions are selected, click the Accept button to complete the Header and Lines section and continue with submitting the application.

**1.5.4 Question: How do I access an Invitation-Only Bid opportunity?**

**Answer:** Log into the system and select City of Chicago Online Bidding. The option will expand; select the folder named **City of Chicago Online Bidding**. This will take you to the Sourcing page, from there; you should see the invitation under the section named **Company's Open Invitation**.

Another option, Delegate Agencies can access the opportunity by using the **solicitation number**. Delegate Agencies can go directly to the solicitation and **select Number under the drop-down menu** and **enter that number** in the box. Select **'Go'**. This will **take you directly to the opportunity**.

**1.5.5 Question: What are the Terms and Conditions?**

**Answer:** When responding to an RFP using the electronic procurement system, you must accept the Terms and Conditions which states, "The City makes no representations or warranties that the electronic procurement system utilized by the City on any procurement will accurately and timely transmit any bidder's bid or proposal or any other information to the City. All bidders use this system at their own risk. The City disclaims all liability that may result or arise from the use by any bidder of the eProcurement system, including claims for lost profits and consequential damages."

- 1.5.6 Question: What is a Response Number? (Application Number)**  
**Answer:** A Response Number is a system generated unique tracking number assigned to each response created and associated with an RFP solicitation. This number is also used to confirm that a bid has been created in the system. This is also known as the confirmation number.
- 1.5.7 Question: How do I know what information to attach to a solicitation?**  
**Answer:** Each solicitation is different and may require different support documentation or justification to attach. Review the RFP to identify all requirements of the solicitation and contact the City department for additional questions on attachment requirements. All agencies are required to provide and ensure that all updated **General Agency Information** is available under the Admin tab of the iSupplier site.
- 1.5.8 Question: Can I copy and paste information from an external source?**  
**Answer:** Yes, users can copy from an external source and paste information into the eProcurement system (i.e. Word, Excel).
- 1.5.9 Question: How will I know if I missed a requirement when trying to submit my RFP Response?**  
**Answer:** The system will provide a detailed error message notifying the user of the missed requirement or line. The error message will appear at the top of the screen and will not allow the user to submit until all errors have been addressed. The system will not provide an error if there are missing attachments.
- 1.5.10 Question: Can multiple people access and update an RFP at the same time?**  
**Answer:** Yes, multiple people within an organization can access the same solicitation, however, access is limited to one user editing a document at a time. When one user is editing a solicitation, the system locks the solicitation. For another person to make additional edits, the solicitation must be unlocked.
- 1.5.11 Question: Why is the Solicitation locked?**  
**Answer:** The reason the solicitation locks once you start the response process is to protect your work product.
- 1.5.12 Question: How do I unlock the Solicitation?**  
**Answer:** The system requires the initiating user the rights to grant access to other users by navigating to the **City of Chicago Online Bidding folder**, Select **Sourcing**, and **Sourcing Homepage**. The system will open the **Negotiations page**. Navigate to the **bottom** of the Negotiations page, search for the section with the header named **Manage** and select **Drafts**. Enter the **Response Number** and Select the Radio button to select the Response. Select **Unlock**. The person given permission to access the response must follow the same steps and select the Radio Button and select **Update**.
- 1.5.13 Question: How do I delete my draft solicitation/quote?**  
**Answer:** **City of Chicago Online Bidding folder**, Select **Sourcing**, and **Sourcing Homepage**. The system will open the **Negotiations page**. Navigate to the **bottom** of the Negotiations page, search for the section with the header named **Manage** and select **Drafts**. Enter the **Response Number** and Select the Radio button to select the Response. Select

**Delete.** The system will ask to confirm that the user wants to delete the solicitation, select Yes or No.

**1.5.14 Question: What mechanisms are in place to inform bidders about solicitations that are about to close?**

**Answer:** There is a real time count down of days and time identifying the exact date and time that the solicitation will close. This information is available on the Negotiations homepage. Users are encouraged to establish additional independent reminders, as necessary, which should be incorporated in the organizations internal control procedural document. The eProcurement website also includes the time and date of all solicitations.

**1.5.15 Question: Will I receive notifications if there are changes to an RFP and if so, what do I do to respond?**

**Answer:** Yes, notifications of addendums will be sent to the originator of the RFP via email. The notification will also be available in the users Worklist Notifications within the iSupplier portal. In addition, if a user is logged into the system and under the City of Chicago Online Bidding folder, the notification will be posed under the Negotiations tab.

Please note that, if an amendment is issued, the RFP number will change from the original format and will include a comma with a number following (i.e. 1234, 1).

The system will update the Response Status to “**Resubmission Required**”. The user must review the changes and acknowledge the changes by clicking the acknowledgement checkbox before proceeding with the update and resubmission of the RFP. The system will issue a new **Response Number** and the status of the Response Number will change from Draft to Active until the user submits the amended response. The system will also provide confirmation that the solicitation has been processed, which will be available at the top of the screen after the quote has been submitted.

**System limitation warning:** The eProcurement system does not alert users when there are changes to attachments, the system will only notify users and provide a system generated notice when there are changes to the requirements, abstract, and/or lines section of the RFP. Since the system does not alert the users of changes to attachments, the City Department will indicate in the notes section if there are any changes to the attachments.

If the amendment is a City-issued amendment, the users are instructed to review the amendment’s attachments for any modifications. If the user is revising an existing Response by modifying an attachment, the user is instructed to add a period (“.”) to the last question/requirement; this will allow the system to proceed with the submission without any further errors, as the system does not recognize changes to attachments.

**1.5.16 Question: Do I have to resubmit my RFP if there is an Addendum issued?**

**Answer:** Yes, if an agency has submitted an RFP and a notification of addendum is received, the agency must review and acknowledge the addendum, then resubmit the RFP. The

system's Response Status will change from "Active" to "Resubmission Required": the warning notice will appear as: " ⚠️ Negotiation has been amended and requires your action to be considered for award". If the user does not acknowledge the addendum, the system will not accept the prior submitted/Active quote and will not be considered for award. The Response will no longer reflect an Active status and will reflect Resubmission Required.

**1.5.17 Question: Can I print my Quote/Response before I submit my Quote?**

**Answer:** Yes, users can print the quote after the Header and Line sections have been entered. Once the Header and Line sections are completed, the user must select Continue and the Printable View option will be available to allow the user to print a copy of the Quote prior to submission.

The user can also print the Quote after the Quote has been submitted. The user must log in to the iSupplier account, navigate to the Negotiations homepage and select the Response number. After clicking the Response Number, the user must select the Printable View option from the Actions drop down list and download a copy of the quote.

Please note that the Response will only include the Header and Lines and will not include the attachments. Users are encouraged to maintain copies of any information submitted, which should be included in the organizations internal controls policy manual.

**1.5.18 Question: How do I confirm that my solicitation has been submitted?**

**Answer:** When the user submits the solicitation, the system will generate a confirmation message with the Response Number, which will appear at the top of the screen. The system will also send a confirmation email to the user. In addition, the user can view the Response Number and view the status to confirm the state of the Response (i.e. Draft vs. Active). If the status is Draft, the solicitation has not been submitted. If the status is Active, the solicitation has been submitted.

**1.5.19 Question: What does Draft, Active, Blind mean?**

**Answer:** **Draft** means that the quote has not been submitted and is still in being modified prior to submitting. An Active Quote indicates that the Quote has been formally submitted. **Active** Quotes can be modified until the RFP is closed. However, Users must be aware that any revisions to submitted/Active Quote will change the Response Number and the new Response Number will be in a Draft status. Users must make sure to submit the new Response Number before the RFP closes. If the RFP closes prior to the revised un-submitted new Draft Quote, the system will accept the most recently submitted Active Quote.

**Blind** Quotes are Quotes that are submitted by the organization but can only be viewed by the person that submitted the Quote. Users are instructed to print copies of the Response/Quote and distribute to the organization internally and save electronic copies for retention purposes.

**1.5.20 Question: What happened to my un-submitted Draft Quote? It disappeared after I submitted my Quote. How do I get my Draft Quote back on the Sourcing Home Page?**

**Answer:** After an RFP has closed, the system removes the un-submitted Draft quote. The system only retains Active/Submitted responses. Before submitting the Quote, it is recommended to make a copy of the submitted Quote for organizational retention purposes. Users can print a version of the final submission by navigating to the Negotiations page, clicking the Response Number, navigating to the Action Dropdown List and selecting Printable View.

**1.5.21 Question: When I Revise an Active Quote, will the system generate a new Response Number or will I retain the exiting Response Number?**

**Answer:** When a User selects the Revise option to revise a previously submitted quote (Active Quote), the system provides two options:

- 1) **Revert to Active Quote**, which will allow the user to retain previously submitted information and make changes to the previously submitted Quote. In this instance, the Response Number will change if when the Quote is saved and/or submitted.
- 2) **Make Changes to the Existing**, which will allow the user to make changes to the previously submitted quote and resubmit. In this instance, Response Number will retain the original Response Number.

**1.5.22 Question: How will I know if the solicitation response was approved?**

**Answer:** Each respective City department is responsible for reviewing and evaluating all submitted proposals. The user department is responsible for notifying agencies of awarded/approved solicitations and notifying the agencies of non-awarded solicitations. Please contact the user department for additional information.

**[Click below for a visual presentation on the Online Bidding process:](#)**

#### **Delegate Agency Online Bidding**



City of Chicago  
Delegate Agency Or

**1.6 QUESTION: REVIEWING PURCHASE ORDERS / AGREEMENTS**

**1.6.1 Question: What are Global Agreements?**

**Answer:** Global Agreements are contracts awarded through iSupplier only. These contracts are the result of responding to an RFP within the iSupplier system and meeting the criteria to partner with the City of Chicago as a Delegate Agent.

**1.6.2 Question: What is a Standard Purchase Order?**

**Answer:** The Standard Purchase Order is the Release of funding for the Global Agreement.



- 1.6.3 Question: What is a 'Conventional/Legacy' Blanket Agreements and Release number?**  
**Answer:** Legacy/Conventional POs are purchase orders that were not created through an eProcurement/iSupplier solicitation and were created prior to the implementation of eProcurement.
- 1.6.4 Question: How will I receive notification of my approved Global Purchase Order (PO) and Standard PO Release number?**  
**Answer:** All approved POs and Releases are available in real-time under the **Orders** tab under the **City of Chicago iSupplier Portal with Invoice Creation**.
- 1.6.5 Question: How will I receive a copy of my approved contract?**  
**Answer:** For contracts originated through eProcurement/iSupplier, if your agency's proposal is approved by the contracting City department, final contract will be uploaded as an attachment to the Global Agreement. The contract can also be accessed through the **City of Chicago's Contract Search at:**  
<https://webapps1.chicago.gov/vcsearch/contracts>
- 1.6.6 Question: What will happen to legacy Blanket Agreements and Releases created prior to the implementation of iSupplier? Will I still have access to these contracts?**  
**Answer:** All Delegate Agencies contracts, Blanket/Global Agreement (PO's) and Standard PO (Releases) are integrated and available to all Delegate Agencies and/or Vendors doing business with the City of Chicago. Payments under all previous purchase orders and releases are available to agencies in the iSupplier portal and all payment preferences and options are also available in the iSupplier portal. In addition, all executed contracts are available on the City's contract search website.  
<https://webapps1.chicago.gov/vcsearch/contracts>
- 1.6.7 Question: How will I communicate budget revisions?**  
**Answer:** Please contact your contracting City Department to identify the correct method of delivery (i.e. hand-delivered, mailed, or emailed).
- 1.6.8 Question: Can I export my information (i.e. Order history, Invoice, and Payment history) from iSupplier?**  
**Answer:** All approved Contracts, Releases, and payments are available in real-time under the **City of Chicago iSupplier Portal with Invoice Creation**, under the **Orders and/or Finance**. Users can navigate to the Export option and can download and save reports as needed.

## **1.7 REVIEWING FINANCIALS AND SUBMITTING INVOICES**

- 1.7.1 Question: What are the benefits for electronic funds transfer?**  
**Answer:** iSupplier portal is a real-time procurement and payment system, allowing Delegate Agencies to track all electronic payments as soon as requests are approved and processed. The processing of paper checks will delay receipt of payment when compared to the electronic payment option. Delegate Agency are anticipated to experience and can institute proper cash management through the elimination and

delays of receiving paper or “hard copy” checks. For more information, please contact the Department of Finance at (312) 744-2204.

- 1.7.2 Question: I cannot see my agency’s bank account information?**  
**Answer:** Please contact the contracting Department to confirm the Vendor Site/Remit To/Pay site associated with the PO. Additional inquiries regarding invoicing or your bank account information, contact [iSupplierinvoices@cityofchicago.org](mailto:iSupplierinvoices@cityofchicago.org) and/or call Cash Management at (312) 744-3233.
- 1.7.3 Question: How do I update my agency’s banking information in eProcurement?**  
**Answer:** Delegate Agencies are not able to update banking information in the system due to security and confidentiality reasons. Delegate Agencies should contact the Department of Finance at (312) 744-2204, to update all financial institution information.
- 1.7.4 Question: Where can I find the Create Invoice option?**  
**Answer:** Starting from the login home page, click on **City of Chicago iSupplier Portal with Invoice Creation**. You will be able to access the Create Invoice section under the Finance tab. When the **Finance** tab is selected, the system will default to the **Create Invoices** form below. Select **Go to Create the Invoice with a PO**
- 1.7.5 Question: Why can’t I find/see my budget to start the invoicing process?**  
**Answer:** The most common reason for not seeing the budget after adding the release number to the search line is **1) The Release is not Active** (This is impacted by the availability of funds, budget revisions in process, etc.) and **2) the User is entering the incorrect number in the search field**. Users are instructed to verify that the Standard PO-Release number is entered, as opposed to the Global Agreement Number or the Specification Number.
- Please Note:** Users can verify the status of the Standard PO-Release by checking the Orders Tab, to verify any pending activity.
- 1.7.6 Question: Why I see all of my budget lines?**  
**Answer:** Contact the contracting department to ensure that all budget lines have a 2-way approval option, as opposed to a 3-way approval option. This is an internal City control and must be addressed at the city-department level.
- 1.7.7 Question: How should your agency number the vouchers/invoices?**  
**Answer:** There are specific methods for agencies with active Purchase Orders, which were not initiated through an iSupplier solicitation and a separate requirement for agencies that receive a new Purchase Order through an iSupplier solicitation. Please see below:
- 1) Pre-iSupplier (Legacy) will use **PO-Release Number-Fiscal Year-Invoice sequence**; and
  - 2) Post iSupplier (New) **Release Number-Fiscal Year-Invoice sequence**. If you have questions about the type of invoice sequence you should use, please contact your contracting department.

- 1.7.8 Question: What should be entered into the Invoice Description?**  
**Answer:** The voucher period of performance/the month of supporting documentation. (09/01/19-09/29/19).
- 1.7.9 Question: What should be entered under the Goods/Services Date Received?**  
**Answer:** Enter the last date in which the services were received or rendered for the period being vouchered. (I.e. if the voucher period of performance covers the period of 09/01/19-09/29/19, the Goods/Services Received date is 09/29/19. Note that this field has a calendar date option
- 1.7.10 Question: Why should you check the Remit address when submitting payment requests?**  
**Answer:** The remittance address (Remit To) is where your payment will be directed. If you have multiple sites, you would want the Remit To address to reflect the proper location, and to ensure that funds will be transferred to the designated bank account.
- 1.7.11 Question: My invoice creation form does not have a Remit to location available. How do I find my Remit To address?**  
**Answer:** There is an option to search the various “Remit To” codes associated with your agency. If you do not see the “Remit To” as the default option, please select the magnifying glass next to the field and select “Go” to do a general search for all available sites. Please see the screenshot below:
- If this option is not available after searching using the magnifying glass, please contact the Department of Finance at 312-744-2204 or [CustomerSupport@cityofchicago.org](mailto:CustomerSupport@cityofchicago.org) for further assistance.
- 1.7.12 Question: How should I attach documents? Is there a specific preference that the City requires for uploading and naming attachments?**  
**Answer:** There are three attachment that must be attached to the invoice.
- 1) **Invoice** (Excel Form)
  - 2) **Certifications** (Invoice and Tax combined into one PDF)
  - 3) **Supporting Documentation** (Supporting Material must be in the same order as the Invoice and combined into one PDF)
- 1.7.13 Question: Are voucher supplemental documents required for all departments?**  
**Answer:** Yes, supplemental documents (i.e. Invoice Signature Certification, Excel budgets, Non-Personnel details/receipts, and additional department-specific information is required.
- Please note:** Documents stored under the **Admin** portal of the **City of Chicago Portal with Invoice Creation** is not required with each voucher submission or RFP submission. Also, some there may require document-specific standards depending on the contracting City department and/or program; please contact the appropriate City contracting department as needed to clarify additional requirements.
- 1.7.14 Question: Is my agency required to submit the Excel Budget as an attachment to RFP’s and Invoices and what if I cannot sign the Excel document?**

**Answer:** Yes, the Excel template must be used and submitted with all RFPs but are not required for the invoices. There is a separate template that must be used for invoices. If you do not have these templates, please contact your contracting City Department. All applicable forms must be signed and uploaded with the invoice submission.

**Please note:** The City has implemented a required Invoice Signature Form required for all invoice/voucher submissions in iSupplier; Delegate Agencies are not required to sign the Excel document. Required information is available on the <http://www.cityofchicago.org/eprocurement> site.

**1.7.15 Question:** **What is an Invoice Certification Form? Is this required for each voucher submission?**

**Answer:** The updated Invoice Certification Form is available from the contracting City Department and is also available on the Training Materials tab of the iSupplier website at: <https://www.cityofchicago.org/city/en/depts/dps/isupplier/online-training-materials.html>. The Invoice Certification Form is required for all voucher submissions (contact the City Departments for exceptions).

**1.7.16 Question:** **Can I save my invoice to edit later? How do I find my saved invoice?**

**Answer:** Yes, users can save invoices for editing later and/or time. The **Save** option is on page 3 of 4 on the **Create Invoice** form. When you select **Save**, you will receive a confirmation that the invoice has been saved. When the invoice is saved, you can recall the invoice by going to the **Create Invoice** page, find your organization name and underneath you will find **Invoice Number Search Option, Select Go (Blind Search)** and items will appear or enter the actual invoice number and the un-submitted item will appear. Select the **pencil icon** to update the invoice and continue to edit or submit the invoice.

**1.7.17 Question:** **How do I find my saved invoice/voucher?**

**Answer:** Saved invoices can be recovered by going to the **Finance** tab, under **Create Invoice**, under the first **Search** option, select **GO**. Please see below for screenshots:

**Step 1:** Recover Saved item by clicking on the **Finance** tab, **Under Search**, Select **Go**  
\*Agency can select other criteria, as needed

**Step 2:** All Invoices will appear. Under **Update** column, select the **Pencil Icon**.  
**Continue updating invoice ad needed.**

**Step 3:** After you save, you will receive a confirmation that the invoice saved. The invoice will disappear from the screen and will be stored for you to come back later or you can recall the item for further action.

**1.7.18 Question:** **How Do I remove a budget line item?**

**Answer:** When an item is selected inadvertently or with Insufficient funds, select the **Back** button that's provided and go back to page 1 of 4 to **remove the line(s)** from the invoice.

**1.7.19 Question:** **What should I do if my invoice is rejected and how should I number the invoice for resubmission in iSupplier?**

**Answer:** If invoice is rejected, please refer to the rejection note entered by the contracting City Department and take the necessary action to address the rejection. Funds are immediately reserved when invoices are created; All rejected invoices must be cancelled by the agency within 48 hours or the Finance Department will cancel the rejected invoice. Once cancelled, funding will be available for use.

The **Rejection note** is emailed to the user account creator. If a note is not received and the user has checked the spam and junk email folders, please contact the contracting department for additional justification.

**Please note:** All created invoices must have a **unique Invoice Number**. After all the identified items have been addressed, the invoice should be resubmitted with one of the following codes included:

- 1) **“R”** for Resubmission due to deletions. All resubmitted vouchers must be submitted with an ‘R’ at the end of the Invoice Number to indicate that the invoice has been resubmitted. If more than one resubmission, the invoice should be numbered accordingly (i.e., 1, 1R, 1R2, 1R3, etc.).
- 2) **“RJ”** for resubmitted invoices due to a Rejected invoice. The **“RJ”** should be referenced at the end of the **Invoice Number**. If more than one resubmission is necessary due to multiple rejections, the invoice should be numbered accordingly (i.e., 1RJ, 1RJ2, 1RJ3, etc.).

**1.7.20 Question: Will my funds be available if an invoice is rejected?**

**Answer:** No, the invoice must be canceled to de-obligate the funds, after which the funds will be available for use.

**1.7.21 Question: How do I cancel my invoice?**

**Answer:** You can recall the invoice by going to the **Create Invoice** page, find your organization name and underneath you will find **Invoice Number Search Option, Select Go (Blind Search)** and items will appear or enter the actual invoice number and the **In Process, Rejected** and **Un-Submitted** item will appear. Select the **cancel icon** to de-obligate the funds.

**1.7.1 Question: How do I add an attachment to my submitted invoice?**

**Answer:** You can recall the invoice by going to the **Create Invoice** page, find your organization name and underneath you will find **Invoice Number Search Option, Select Go (Blind Search)** and items will appear or enter the actual invoice number and the **In Process** item will appear. Select the last **cell to the right and you will find the view/add attachment button**.

**[Click below for a visual presentation on the Online Invoicing process:](#)**

**Delegate Agency Invoice Creation**



City of Chicago  
Delegate Agency Inv

## 1.8 CONTACT INFORMATION

**\* Questions on Registration:**

[CustomerSupport@cityofchicago.org](mailto:CustomerSupport@cityofchicago.org)

**\* eProcurement (iSupplier) 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>