

# **Delegate Agencies Frequently Asked Questions (FAQ's) iSupplier Portal (eProcurement)**

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# iSupplier Frequently Asked Questions for Delegate Agencies

## General Registration and Admin

1. **Question:** When will this new system impact my agency?  
**Answer:** As of **October 1, 2017**, all Delegate Agencies doing business or intending to do business with the City of Chicago are **required** to register and submit all procurements, payment requests, and supplemental documents in the **iSupplier** (eProcurement system) at <http://www.cityofchicago.org/eprocurement> .
2. **Question:** Is iSupplier used for all City of Chicago's business/procurement?  
**Answer:** Yes. The Oracle is the City of Chicago's Financial Management Procurement System, used to the iSupplier portal. As of **October 1, 2017**, all delegate agencies are required to register and manage all procurement and payments through the iSupplier (eProcurement) portal.
3. **Question:** Is there a standard naming convention for attaching files?  
**Answer:** Yes. All attachments should be properly named in order 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)

**4. 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.

**5. 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> .

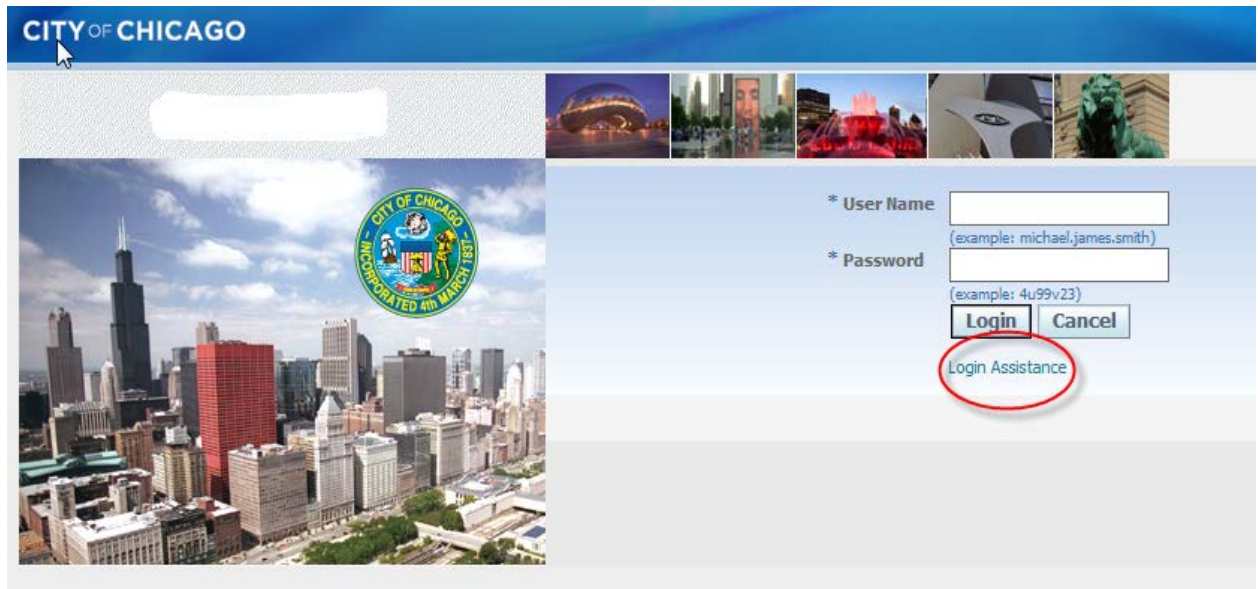
**Question:** **What should I do if my organization's historic information (i.e. Orders and Payments) are not available in the system? I cannot see my agency's payments or orders in the system?**

**Answer:** **Orders and Payments** are available for any agency with existing or previous contracts with the City of Chicago. Agencies experiencing issues viewing or accessing **Orders, Budget Lines, or Payments** could be a result of agencies registered under multiple existing vendor names, numbers, or payment sites, which could cause users to experience delays in accessing **Order or Payment**

information in the system. Assistance will be provided to Delegate Agencies by contacting [eProcSupport@cityofchicago.org](mailto:eProcSupport@cityofchicago.org) and [OBMGMU@cityofchicago.org](mailto:OBMGMU@cityofchicago.org).

**6. Question: How can I reset my password?**

**Answer:** The Login Assistance option is available on the login in screen at: [Password and Username Assistance](#). Please see the following screenshot(s):



Users are able to 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.

If you do not receive an email providing instructions to reset your password, please check your spam or junk folder. If you have not received the email after verifying the previous step, please contact [OBMGMU@cityofchicago.org](mailto:OBMGMU@cityofchicago.org) or (312) 744-0358 for further assistance.

**7. Question: How will I receive notification of my approved Purchase Order (PO) and 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**.

**8. 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, then the boilerplate and final contract will be uploaded in the Online discussion section of the awarding RFP. Also, the contract can be accessed through the City of Chicago Contract

Search at:

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

**9. Question: Is my agency required to mail a signed original of the budget revision or budget amendment? What is the submission requirement for budget revisions and budget amendments?**

**Answer:** Delegate Agencies should contact the contracting City Department for directions on the proper format for sending contract documents and other documents that require a “wet” or ‘live’ signature.

**10. Question: What is a ‘Conventional/Legacy’ PO and Release number?**

**Answer:** Legacy/Conventional POs are purchase orders that were not created through an eProcurement/iSupplier solicitation.

**11. Question: Can I export my information (i.e. Order history, Invoice, and Payment History) from iSupplier?**

**Answer:** Yes. The Export function is available on the **Orders** and **Finance** sections (tabs) in iSupplier. The export will be generated as a .CSV text file. Users can save the file and convert into Excel, as needed.

**12. Question: Where can I access the required templates (i.e. Excel Budget Template, Invoice Signature Authorization Form, etc.)?**

**Answer:** The contracting City Department is responsible for providing standard templates. Please reach out to your appropriate contact or liaison.

- The **Department of Public Health’s Contracting Documents** are available at: [CDPH Supplemental Documents and Templates](#)
- The **Department of Planning and Development’s Contracting Documents** are available at: [DPD Supplemental Documents and Templates](#)

## Registration

**13. Question:**

**How do I register my agency?**

**Answer:**

Agencies can register at: [iSupplier Registration](#). 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.

*If you require additional assistance, please use the training link on registration site available here:*

[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)

**14. Question:**

**How do I accept an Invitation?**

**Answer:**

The Department of Procurement Services will send an email notification that includes the username and temporary password. Users are required to reset the password to a new password. Please make sure to check the spam or junk mail if a notification is not received.

**Please note:** There is a period (.) at the end of the sentence in which the temporary password is generated. 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 do not receive an email providing instructions to reset your password, please check your spam or junk folder. If you have not received the email after verifying the previous step, please contact [OBMGMU@cityofchicago.org](mailto:OBMGMU@cityofchicago.org) or (312) 744-0358 for further assistance.

## Funding Opportunities

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

**Answer:**                Please use the following link for funding opportunities; Delegate Agency opportunities are available under the **Event** named **Delegate Agency**.

**Here is the website for Bid Opportunities:**

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

**16. Question:**            **Do I have to be registered to find a bid opportunity?**

**Answer:**                Users are not required to log into the system to view an opportunity. However, users are required to log in to respond and submit the proposal.

**17. Question:**            **Can multiple people access and update an RFP at the same time?**

**Answer:**                Yes, but you will not be able to work on the same application simultaneously.

**18. 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.

**19. Question:**            **Will I receive notifications if there are changes to an RFP?**

**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.

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

**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.

**21. 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** (highlighted below).

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**. **Screenshot below:**



**Main Menu**

[Personalize](#)

- + 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.				
✓ <a href="#">TIP Vacation Rules</a> - Redirect or auto-respond to notifications.				
✓ <a href="#">TIP Worklist Access</a> - Specify which users can view and act upon your notifications.				

Navigator Favorites Home Logout

**Negotiations**

Search Open Solicitations:  Title  [Go](#)

Welcome, Lynn Lu.

**Your Active and Draft Responses**

Press Full List to view all your company's responses. [Full List](#)

Response Number	Response Status	Supplier Site	Solicitation Number	Title	Type	Time Left	Monitor	Unread Messages
<a href="#">26004</a>	Active		<a href="#">6073</a>	Community Receiver Program	RFQ	352 days 22 hours		<a href="#">0</a>

**Your Company's Open Invitations**

[Full List](#)

Supplier Site	Solicitation Number	Title	Type	Time Left
No results found.				

**Quick Links**

Manage	View Responses
<ul style="list-style-type: none"> <li>• <a href="#">Drafts</a></li> <li>• <a href="#">Deliverables</a></li> <li>• <a href="#">Personal Information</a></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Active</a></li> <li>• <a href="#">Disqualified</a></li> <li>• <a href="#">Awarded</a></li> <li>• <a href="#">Rejected</a></li> </ul>

## CyberGrants and Historic Information

**22. Question:** What will happen to the information that was stored in CyberGrants? Will this information be available in eProcurement.

**Answer:** Information stored in CyberGrants is archived by the City of Chicago for purposes of complying with record retention requirements. Delegate Agencies are required to maintain documentation as identified in their grant agreement; however, Delegate Agencies were encouraged to export any information from CyberGrants prior to October 1, 2017.

**23. Question:** Do I have to re-upload my agency's information (i.e. Articles of Incorporation, Insurance, Good Standing Notice) in iSupplier even if I already provided this information to the department or in CyberGrants?

**Answer:** Yes, agencies are responsible for uploading required documents in iSupplier's centralized portal. 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 is available on the following website: <https://www.cityofchicago.org/city/en/depts/dps/isupplier/delegates.html>

## **Program**

**24. Question:**

**What is a Program Code?**

**Answer:**

A program code is a unique code established by the City Department for purposes of identifying their program. This code is required for all vouchers and must be entered in the **Invoice Description** field.

**25. Question:**

**Where do I get/find the PO Department Program code?**

**Answer:**

The contracting City Department will provide the program codes to all agencies.

## **Manage Administration and Active Agency Information**

**26. Question:**

**How do I Create or Inactivate Existing Contacts?**

**Answer:**

Agencies can add or deactivate users from an organizations profile in iSupplier. This option is available under the Main Menu section, in the folder for **City of Chicago iSupplier Portal with Invoice Creation**, under the **Admin** tab. Click on **Contact Directory to Create** or **Edit and Deactivate** a user from an organization. [Instructions on Inactivating Users](#) and [Instructions for Creating a New User](#)

**27. Question:**

**What if I accidentally inactivate an existing contact?**

**Answer:**

Log into the system, 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-entered as a new contact. If the agency requires to reactivate a user with the same username as previously established, contact [eProcSupport@cityofchicago.org](mailto:eProcSupport@cityofchicago.org).

[Instructions for Creating a New Address or Editing Address Information](#)

Please note that changes to the address details or bank account details can be initiated by the user; however, all final changes must be reviewed and approved by DPS prior to the changes being reflected in the system. Agencies will receive an email from [eProcSupport@cityofchicago.org](mailto:eProcSupport@cityofchicago.org) when additional information is required or when changes are rejected.

**28. Question:**

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

**Answer:**

[eProcSupport@cityofchicago.org](mailto:eProcSupport@cityofchicago.org) will assist in creating 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 [eProcSupport@cityofchicago.org](mailto:eProcSupport@cityofchicago.org) for further requirements.

If you are uncertain if an account has been created for you, use the **Login Assistance** option at the following: [Login/Register](#)

**29. Question:** **Can multiple people register the same organization? How do I invite others into my organization's business account in iSupplier?**

**Answer:** No. A Delegate Agency can only have one account in the eProcurement system. It is linked using the organizations Federal Employer Identification Number (FEIN). Delegate Agencies can add or deactivate users from an organization's account in iSupplier.

[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_Create_New_Address_and_Contact.pdf)

**30. 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.

[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_Create_New_Address_and_Contact.pdf)

**31. 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 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. **See screenshots below:**

**Main Menu**

[Personalize](#)

- City of Chicago iSupplier Portal with Invoice Creation
- Home Page
- 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.		

**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**  
 Parent Supplier Name:      Country of Tax Registration:      Parent Supplier Number:      Alias:      Country of Tax Registration:

**Attachments**

**Search**

Note that the search is case insensitive

Title:  [Go](#)

[Show More Search Options](#)

[Add Attachment...](#)

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			

## Invoicing

**Please note:** The ‘Save’ functionality has been corrected. Agencies can Save an invoice for submission at a future date by selecting the ‘Save’ option on the second page of the ‘Create Invoice’ form.

**32. Question:** My invoice creation form does not have a Remit to location available. How do I find my Remit To address?

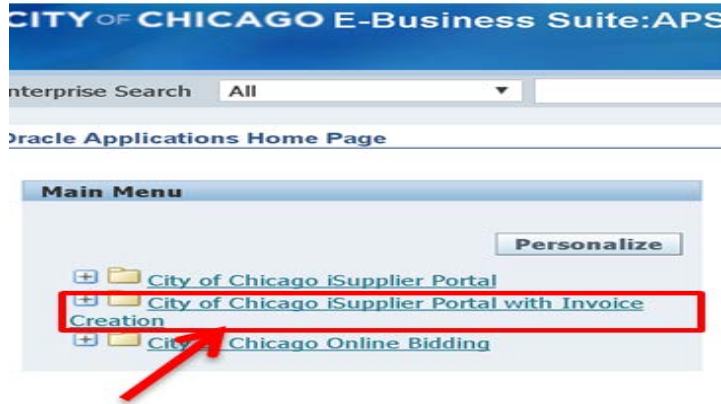
**Answer:** There is an option to search the various “Remit To” codes associated with your agency. If you do not see the “Remit To” as the default option, please select the magnifying glass next to the field and select “Go” to do a general search for all available sites. Please see the screenshot below:

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	100	1	USD	100

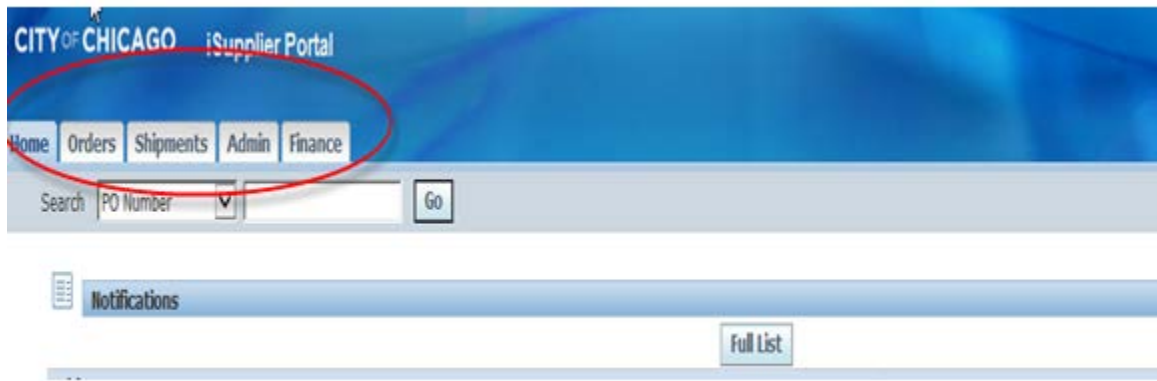
If this option is not available after searching using the magnifying glass, please contact the Department of Finance at 312-744-2204 or [OBMGMU@cityofchicago.org](mailto:OBMGMU@cityofchicago.org) or [eProcSupport@cityofchicago.org](mailto:eProcSupport@cityofchicago.org) for further assistance.

**33. Question:** Where can I find the Create Invoice option?

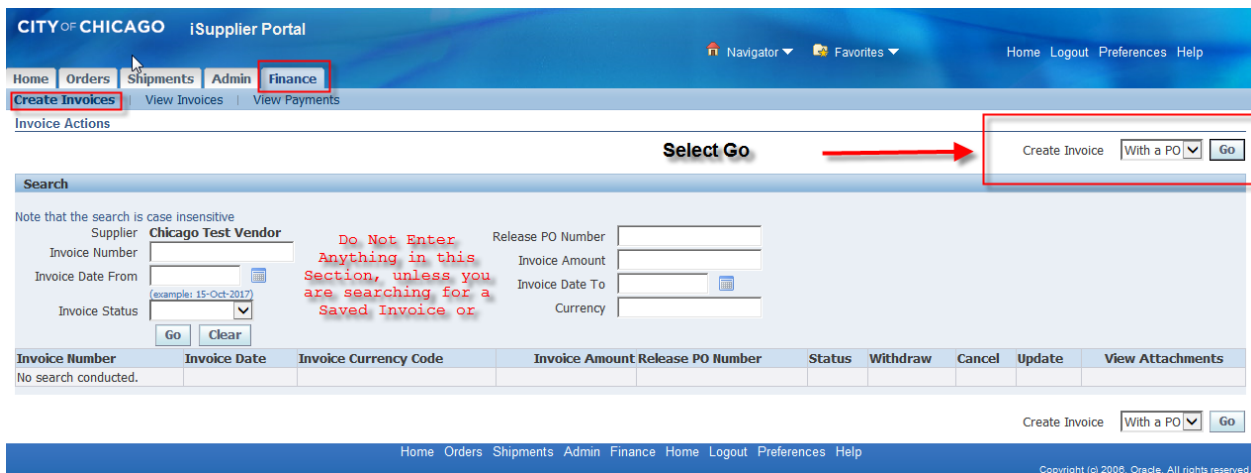
**Answer:** You can access the **Create Invoice** section under the **Finance** tab. See screenshot below:



- Select 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**:





**CITY OF CHICAGO iSupplier Portal**

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

Enter PO and Release Number and Select GO

Advanced Search

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
No search conducted.																

Cancel Step 1 of 4 Next

Home Orders Shipments Admin Finance Home Logout Preferences Help

- Enter PO and Release Number and Select 'GO'. All approved budget lines will appear.

**Search**

Note that the search is case insensitive

Release PO Number  ⓘ

Release PO Date  (example: 18-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	Unit Price	Curr	Ship To	Organization	Packing Slip	Waybill
<input checked="" type="checkbox"/>	31700	1	1	<input type="checkbox"/>	0005 PERS/A1		84773	0	39545.23	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE			
<input type="checkbox"/>	31700	1	1	<input type="checkbox"/>	0005 PERS/A1		88292	0	86548.13	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE			
<input type="checkbox"/>	31700	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"/>	31700	2	2	<input type="checkbox"/>	0044 FRINGE/A1		33909	0	15818.1	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE			
<input type="checkbox"/>	31700	2	2	<input type="checkbox"/>	0044 FRINGE/A1		35316	0	34619.19	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE			
<input type="checkbox"/>	31700	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"/>	31700	3	4	<input type="checkbox"/>	0140 PROF TECH/A1		27218	0	1605	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE			
<input type="checkbox"/>	31700	3	4	<input type="checkbox"/>	0140 PROF TECH/A1		22725	0	22675	USD	1	USD	FINANCE-COMPTROLLER	CITY OF CHICAGO - GRE			
<input type="checkbox"/>	31700	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"/>	31700	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 Step 1 of 4 Next

- Select the appropriate lines and Select Next
- Enter Required Information, Attachments, Line item budget request and select Next

- Complete the Voucher and select **Submit**.

### 34. How do I remove a budget line from my invoice?

**Answer:** If you add a line inadvertently or a line without any funds, the line must be removed prior to proceeding to submit the invoice. If you add a line and want to delete a line, please select the **Back** button and **remove the selected line**. See screenshot below:



- **Remove selected line. Select Next to Continue with submission.**

- 35. 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.
- 36. 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.
- 37. 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 have the ability to 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

**38. Question:** **What will happen to PO’s and Releases/Contracts created prior to iSupplier?**

**Answer:** All Delegate Agencies contracts, PO’s and 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.

**39. 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.

**40. 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.

**41. 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).

- 42. Question:** **How will I communicate budget revisions?**  
**Answer:** If you were awarded a PO that was not initiated through an RFP in iSupplier (eProcurement), please contact your contracting City Department to identify the correct method of delivery (i.e. hand-delivered, mailed, or emailed). POs created from a solicitation in iSupplier are required to submit budget revisions and contract amendment requests using the Online Discussion option in iSupplier.
- 43. 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. Delegate Agencies should contact the Department of Finance at **(312) 744-2204** to update all financial institution information.
- 44. 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.
- 45. Question:** **Can I save my invoice to edit at a later time? How do I find my saved invoice?**  
**Answer:** Yes, users can save invoices for editing at a later date and/or time. The **Save** option is on the second page 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, under **Search**, **Select Go** and the un-submitted items will appear. Select the **pencil icon** to update the invoice and continue to edit or submit the invoice.
- \*Search options are available for other options, like Status. Please see screenshots below:*
- Step 1:** Complete the Invoice Form with Attachments and Quantity and Select **Next**

**CITY OF CHICAGO iSupplier Portal**

Home | Orders | Shipments | Admin | Finance

Create Invoices | View Invoices | View Payments

Purchase Orders | Details | Manage Tax | Review and Submit

Create Invoice: Details

\* 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 32010-4-17-01R  
 Invoice Date 17-Oct-2017  
 Invoice Type Invoice  
 Currency USD  
 \* Invoice Description 09/01/17-09/29/17 CC  
 Date Good/Services Received 29-Sep-2017  
 \* 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

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	1,7994.33	1,7994.33	1	USD	1,7994.33
32010-4	3	3		0044 PROGRAM FRINGES		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

## Step 2: Click Save

Create Invoices | View Invoices | View Payments

Purchase Orders | Details | Manage Tax | Review and Submit

Create Invoice: Manage Tax

Cancel **Save** Back Step 3 of 4 Next Submit

Supplier

\* Supplier Chicago Test Vendor  
 Tax Payer ID 12-4356789  
 \* Remit To A (EFT XX1234)  
 Address 123 ADAMS ST, SUITE 99 CHICAGO IL 60603  
 Remit To Bank Account XXXXXX6961  
 Unique Remittance Identifier  
 Remittance Check Digit

Invoice

\* Invoice Number 32010-1-17-19  
 \* Invoice Date 06-Oct-2017  
 Invoice Type Standard  
 \* Currency USD  
 Invoice Description 09/01/17-09/29/17 HS  
 Date Good/Services Received 29-Sep-2017  
 Department Number 50  
 DEPT OF FAMILY AND SUPPORT SERVICES  
 Web Disclosure  
 Attachment None

Customer

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

### 46. 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.**

**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 Go

**Search**

Note that the search is case insensitive

Supplier **Chicago Test Vendor**

Invoice Number [ ] Release PO Number [ ]

Invoice Date From [ ] Invoice Amount [ ]

Invoice Date To [ ] Invoice Date To [ ]

Invoice Status [ ] Currency [ ]

Go Clear

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				
32010-4-17-1999	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				

Create Invoices View Invoices View Payments

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

Create Invoice: **Manage Tax**

Cancel **Save** Back Step 3 of 4 Next Submit

**Supplier**

\* Supplier **Chicago Test Vendor**  
 Tax Payer ID **12-4356789**  
 \* Remit To **A (EFT XXI234)**  
 Address **123 ADAMS ST. SUITE 99 CHICAGO IL 60603**  
 Remit To Bank Account **XXXXXX6961**  
 Unique Remittance Identifier  
 Remittance Check Digit

**Invoice**

\* Invoice Number **32010-1-17-19**  
 \* Invoice Date **06-Oct-2017**  
 Invoice Type **Standard**  
 \* Currency **USD**  
 Invoice Description **09/01/17-09/29/17 HS**  
 Date Good/Services Received **29-Sep-2017**  
 Department Number **50**  
 DEPT OF FAMILY AND SUPPORT SERVICES  
 Web Disclosure  
 Attachment **None**

**Customer**

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

**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 at a later time or you can recall the item for further action.

Home Orders Shipments Admin Finance

Create Invoices View Invoices View Payments

Confirmation  
 Invoice 32010-1-17-19 has been saved for update and later submission.

Invoice Actions

Create Invoice With a PO Go

**Search**

Note that the search is case insensitive

Supplier **Chicago Test Vendor**

Invoice Number [ ] Release PO Number [ ]

Invoice Date From [ ] Invoice Amount [ ]

Invoice Date To [ ] Invoice Date To [ ]

Invoice Status [ ] Currency [ ]

Go Clear

Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Release PO Number	Status	Withdraw	Cancel	Update	View Attachments
No search conducted.									

Create Invoice With a PO Go

**47. Question:**

**Answer:**

**How Do I remove a budget line item?**

When an item is selected inadvertently or with Insufficient funds, select the **Back** button and **remove the lines** from the invoice. Please see the following steps:

- Step 1: Select the **Back** option

**Supplier**

\* Supplier: Chicago Test Vendor  
Tax Payer ID: 12 4356789  
\* Remit To: A (EFT XXX1234)  
Address

**Invoice**

\* Invoice Number: 32010-1-17-19  
Invoice Date: 06-Oct-2017  
Invoice Type: Invoice  
Currency: USD  
\* Invoice Description: 09/01/17 09/29/17 IIG  
Date Good/Services Received: 29-Sep-2017  
\* Department Number: 50  
DEPT OF FAMILY AND SUPPORT SERVICES  
\* Attachment: None

**Customer**

Customer Tax Payer ID: 36-6005820  
Customer Name: CITY OF CHICAGO - GRE  
Address

**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	1,994.33	100	1	USD	100

Buttons: Cancel, Back, Step 2 of 4, Next

- Step 2: **Select the line** that you would like to remove
- Step 3: Click **Remove from Invoice**
- Step 4: Select **Next to continue** with the invoice

**Purchase Order Items Added to Invoice**

Select Item: 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 checked="" type="checkbox"/>	32010-4	2	2	0005-PROGRAM-PERSONNEL		86715.33 0	66721	USD	1	USD	050-2005 FAMILY AND SUPPORT SERVICES		CITY OF CHICAGO - GRE	

Buttons: Cancel, Step 1 of 4, Next

**48. Question:**

**Answer:**

**What should be entered under the Goods/Services Date Received?**

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 09/01/17-**09/29/17**, the Goods/Services Received date is **09/29/17**. Note that this field has a calendar date option



**49. Question:**

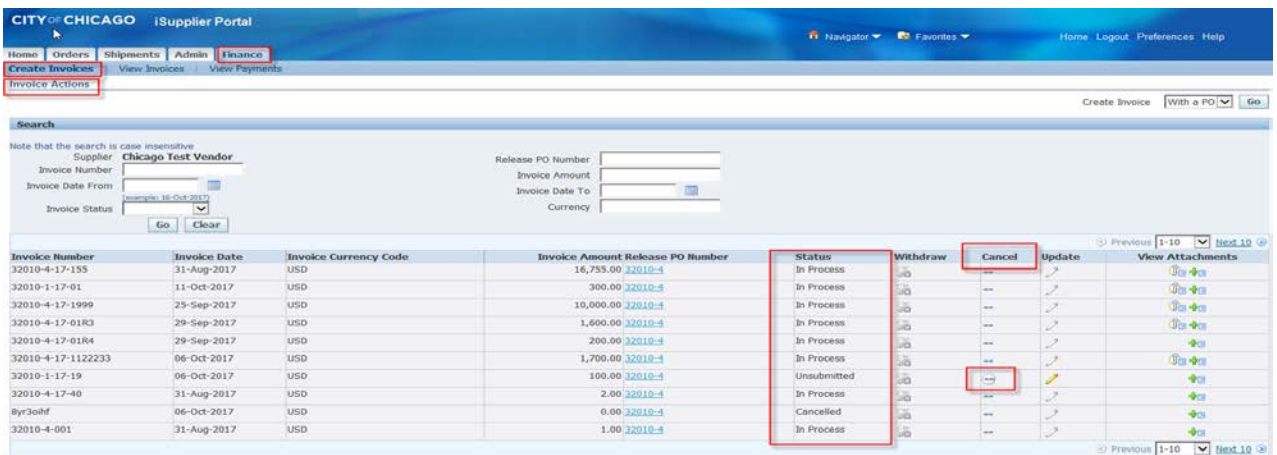
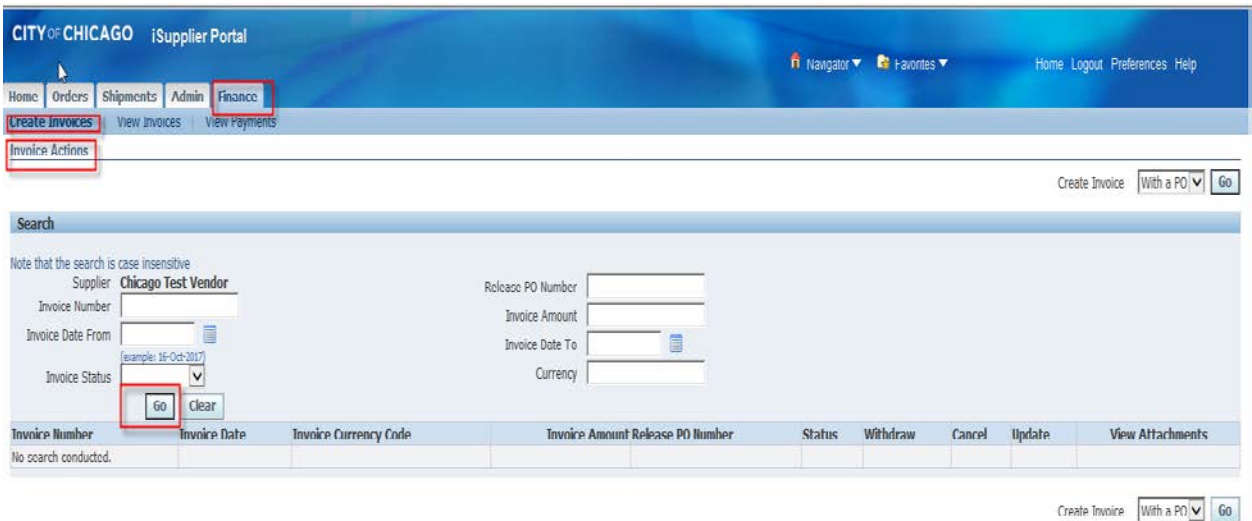
**What should I do if my invoice is rejected?**

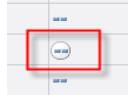
**Answer:**

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 and the invoice must be cancelled by the agency. Once cancelled, funding will be available for use.

The **Rejection note** is emailed to the user account submitting the invoice and is also available under the **Worklist**. 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.

**Reminder:** The user must **Cancel** the invoice, which un-reserves the funds; to allow the agency to resubmit the invoice. **Please see below for cancelling an invoice:**





Cancel Icon

**Please note:** All created invoices must have a **unique Invoice Number**. After all of the identified items have been addressed, the invoice should be resubmitted with a unique **“Invoice Number”** that includes reference to **“R”** for Resubmission for Rejected invoice. The **“R”** should be referenced at the end of the **Invoice Number**.

**50. Question:**

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

**Answer:**

No, the agency is required to cancel the invoice.

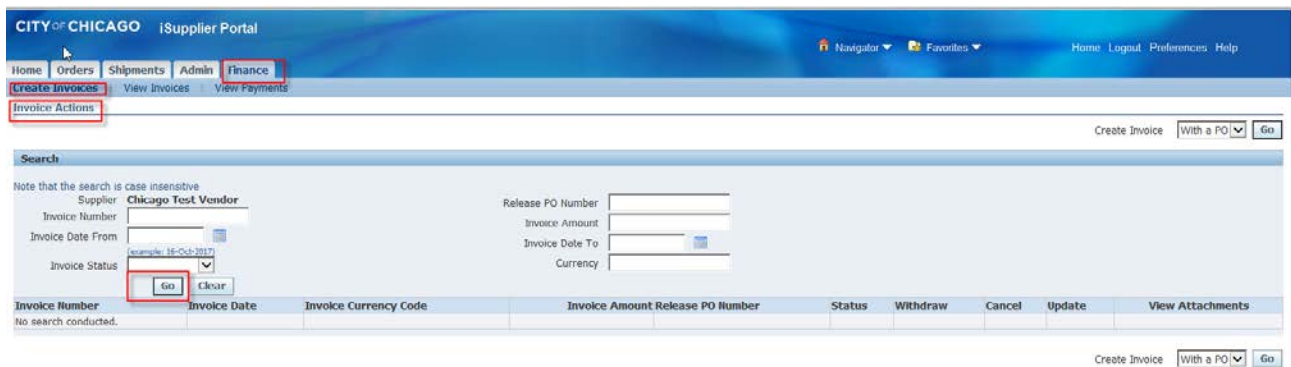
**51. Question:**

**How do I cancel my invoice?**

**Answer:**

Please follow these steps to cancel an invoice:

- 1) Go under the **Finance** Tab
- 2) Select **Go** under the first search option – This will allow for a **general search** on all invoices/items
- 3) A list of **In Process, Rejected, Cancelled,** and **‘Unsubmitted’** Invoices will appear
- 4) Under the **Cancel** tab, there is an icon that will allow you to cancel the invoice. When the invoice is cancelled, the funds are **unreserved** and you can submit the voucher. Please remember that the **invoice number must be unique when resubmitting a rejected or resubmitted voucher** due to deletions.





CITY OF CHICAGO iSupplier Portal

Home Orders Shipments Admin Finance

Create Invoices View Invoices View Payments

Invoice Actions

Create Invoice With a PO Go

Search

Note that the search is case insensitive

Supplier Chicago Test Vendor

Invoice Number

Invoice Date From

Invoice Status

Release PO Number

Invoice Amount

Invoice Date To

Currency

Go Clear

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	...	...	...	...
8yr3oahf	06-Oct-2017	USD	0.00	32010-4	Cancelled	...	...	...	...
32010-4-001	31-Aug-2017	USD	1.00	32010-4	In Process	...	...	...	...

**Question:** How should I attach documents? Is there a specific preference that the City requires for uploading and naming attachments?

**Answer:** See response to Question 3 for detailed explanation.

**52. Question:** If I have to resubmit a voucher, how should I number the invoice for resubmission in iSupplier?

**Answer:** 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, then the invoice should be numbered accordingly (ie, 1, 1R, 1R2, 1R3, etc.)

## **Contact Information:**

- ❖ **Questions on Registration:** [eprocsupport@cityofchicago.org](mailto:eprocsupport@cityofchicago.org)
- ❖ **eProcurement for Delegate Agencies:** [OBMGMU@cityofchicago.org](mailto:OBMGMU@cityofchicago.org) or (312) 744-0358
- ❖ **Up to Date Training Materials (PDF Documents and Videos):** [Training Material](#)

# Delegate Agency iSupplier Presentation

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# CITY OF CHICAGO DELEGATE AGENCY

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## 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.

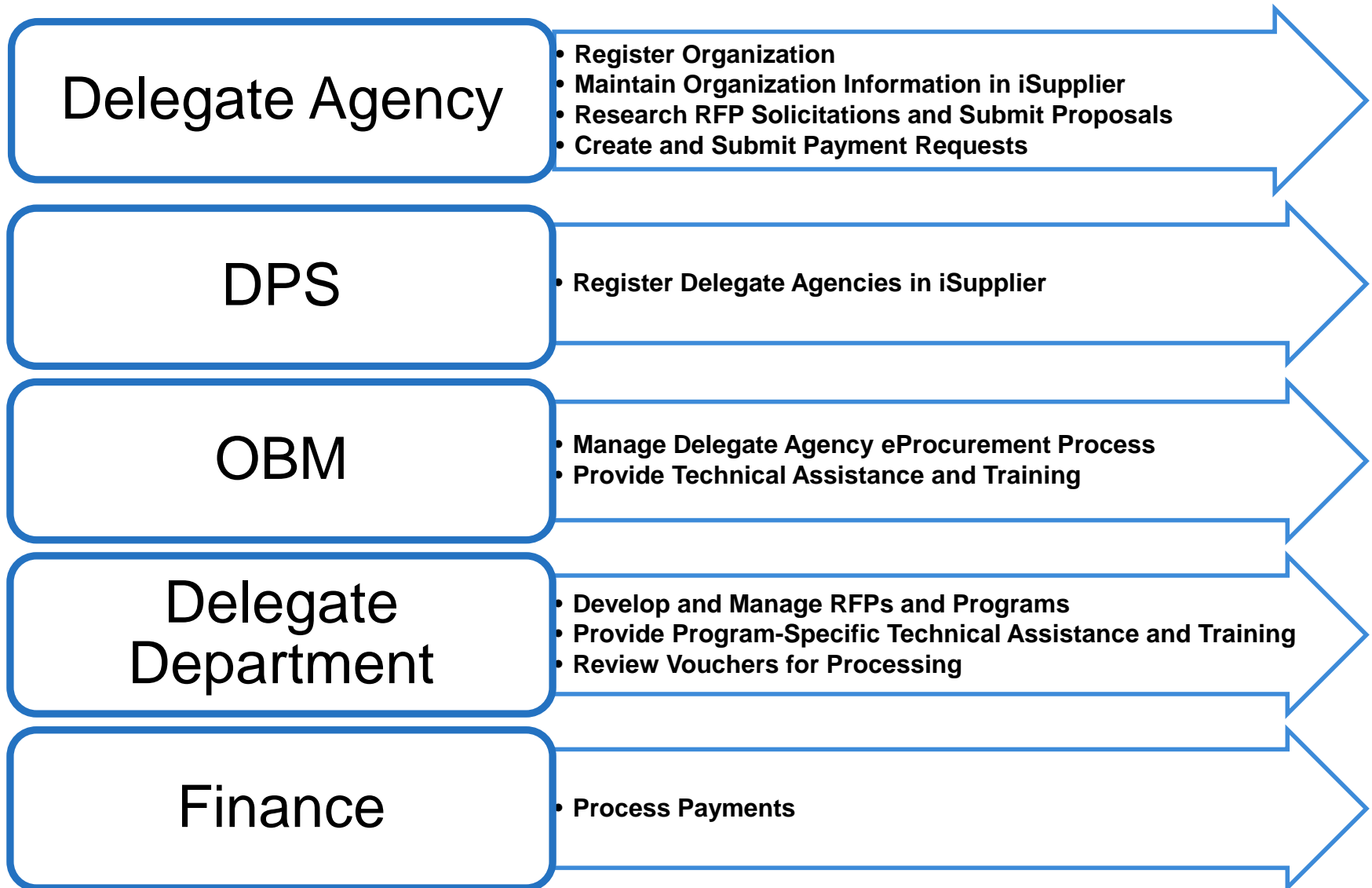
Review & Respond to Solicitations

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. Sister 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-XXXXXX

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

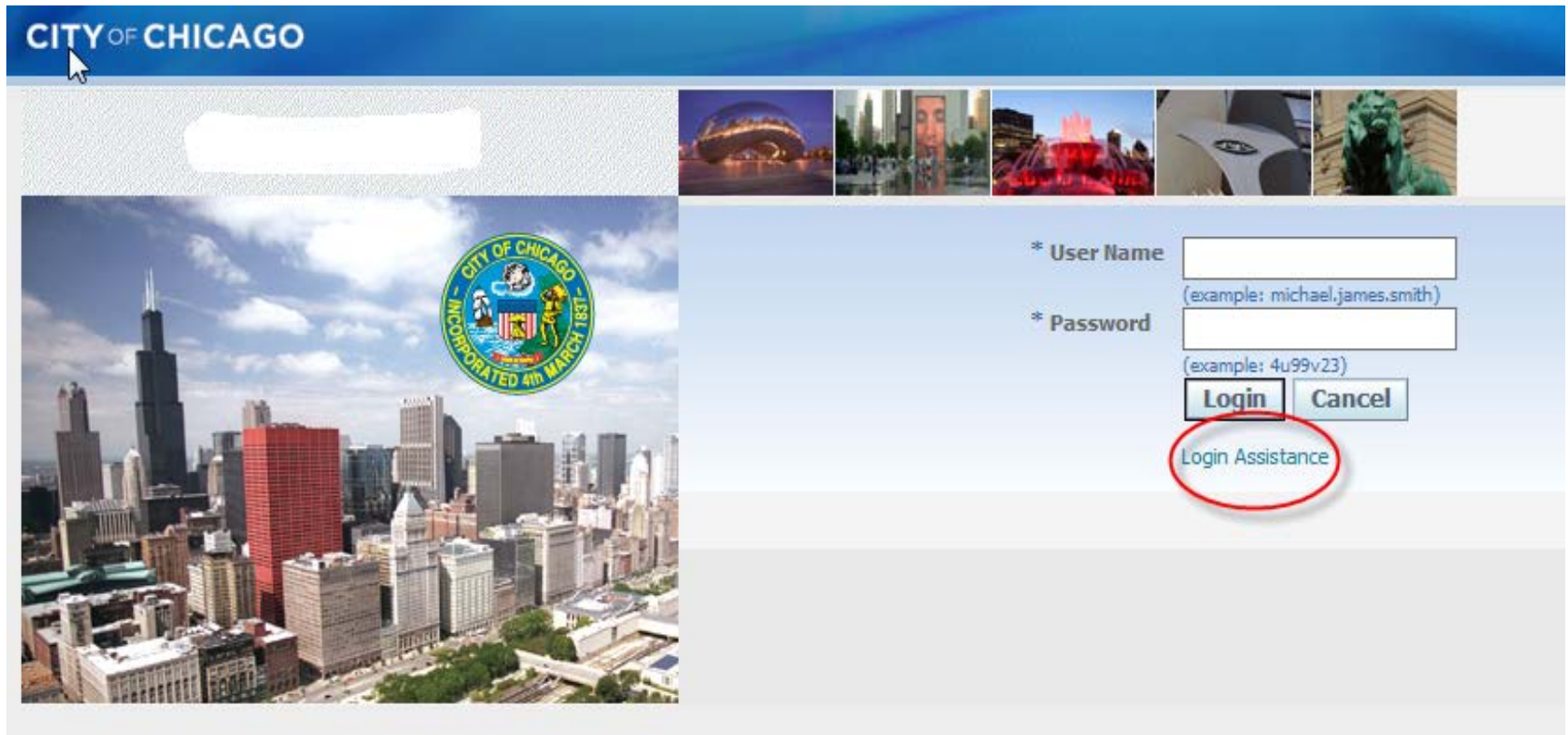
- Add Attachments
- Users will receive the

# ISUPPLIER PORTAL OVERVIEW

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# 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

CITY OF CHICAGO E-Business Suite: SAPPHIRE

Enterprise Search All [Go] Search Results Display Pr

Oracle Applications Home Page

**Main Menu** Personalize

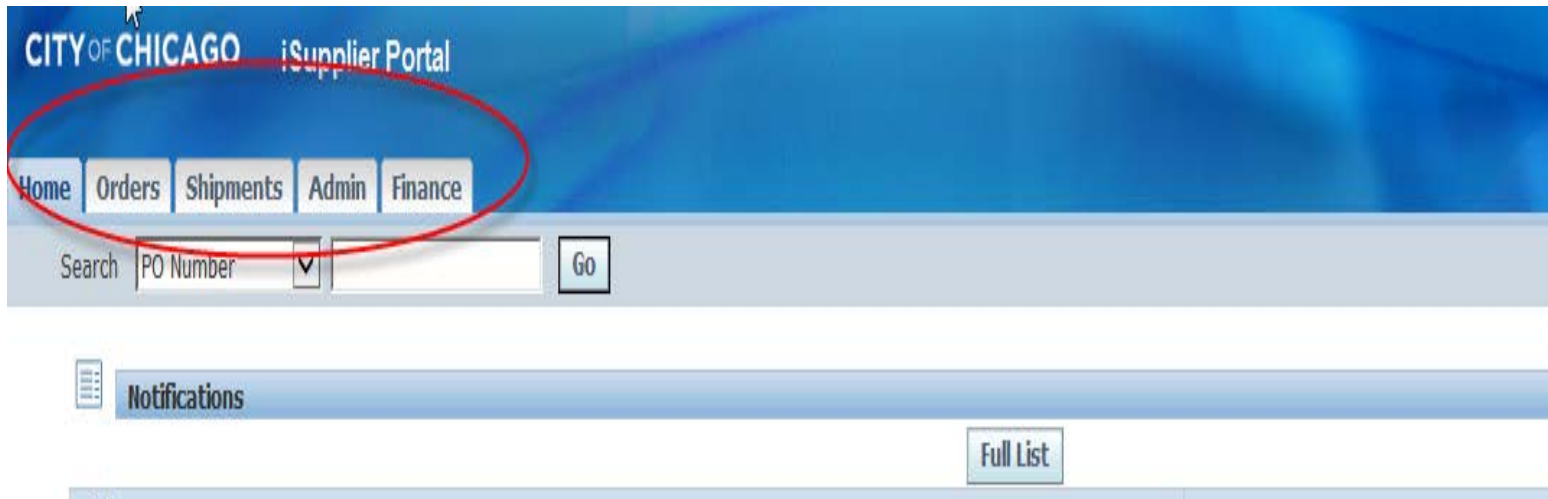
- City of Chicago iSupplier Portal with
  - Invoice Creation** 1
    - Home Page
  - City of Chicago Online Bidding
    - Sourcing
      - Sourcing Home Page
      - Worklist** 2

**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.		

# 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
<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)
  - ❖ 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"/>	<a href="#">58759</a>	<a href="#">0</a>	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"/>	<a href="#">58755</a>	<a href="#">0</a>	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"/>	<a href="#">55403</a>	<a href="#">0</a>	CITY OF CHICAGO - GRE	Standard PO		20-Mar-2017 16:59:13	USD	2,000.00	Closed
<input type="radio"/>	<a href="#">43982-1</a>	<a href="#">0</a>	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
<a href="#">10881587</a>		B	01-May-2017	USD	6,265.00	Electronic	Reconciled
<a href="#">10878446</a>		B	27-Mar-2017	USD	8,134.29	Electronic	Reconciled
<a href="#">10878321</a>		A	24-Mar-2017	USD	2,000.00	Electronic	Reconciled
<a href="#">10876636</a>		A	07-Mar-2017	USD	2,000.00	Electronic	Reconciled
<a href="#">10876271</a>		B	01-Mar-2017	USD	2,659.00	Electronic	Reconciled
<a href="#">10874266</a>		B	07-Feb-2017	USD	3,381.71	Electronic	Reconciled

# BIDDING – RFP REVIEW

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# iSupplier Online Bids

Login

## City of Chicago eProcurement Solicitations



Details

Document PDF File

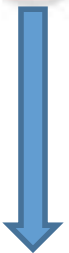
To view or download solicitations without logging in, click the icon at the Online Bid link, then click [www.cityofchicago.org/eProcurement](http://www.cityofchicago.org/eProcurement). For non-eProcurement bids, visit [www.cityofchicago.org/bids](http://www.cityofchicago.org/bids) to open. To sort the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

### 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

Details  
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 of the page, 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** Quote Valid Until    
 RFQ Currency **USD** (example: 24-Jul-2017)  
 Quote Currency **USD** Reference Number   
 Price Precision **Any** 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 checked="" 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	
		RFQ Currency	<b>USD</b>
		Price Precision	<b>Any</b>
Line		Update	Quote Price Unit
1	<a href="#">0005 - Personnel</a>		<input type="text" value="11200"/> USD
2	<a href="#">0044 - Fringe Ben...</a>		<input type="text" value="1200"/> USD
3	<a href="#">0100 - Operating/...</a>		<input type="text"/> USD
4	<a href="#">0140 - Profession...</a>		<input type="text"/> USD
5	<a href="#">0200 - Travel</a>		<input type="text"/> USD
6	<a href="#">0300 - Materials ...</a>		<input type="text"/> USD
7	<a href="#">0400 - Equipment</a>		<input type="text"/> USD
8	<a href="#">0801 - Indirect</a>		<input type="text"/> USD
9	<a href="#">0999 - Other</a>		<input type="text"/> USD

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

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 displays the 'CITY OF CHICAGO iSupplier Portal' interface. The 'Finance' tab is selected and highlighted with a red box. Below it, the 'Create Invoices' link is also highlighted with a red box. In the top right corner of the Finance section, the 'Create Invoice' button is highlighted with a red box, along with a dropdown menu set to 'With a PO' and a 'Go' button.

The search section contains the following fields:

- Supplier: Chicago Test Vendor
- Invoice Number: [Empty field]
- Invoice Date From: [Empty field]
- Invoice Status: [Dropdown menu]
- Release PO Number: [Empty field]
- Invoice Amount: [Empty field]
- Invoice Date To: [Empty field]
- Currency: [Empty field]

A red text annotation 'Leave this section blank' is placed between the 'Invoice Date From' and 'Release PO Number' fields. 'Go' and 'Clear' buttons are located below the search fields.

Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Release PO Number	Status	Withdraw	Cancel	Update	View Attachments
No search conducted.									

At the bottom right, another 'Create Invoice' button with a 'With a PO' dropdown and a 'Go' button is visible.

# 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 | 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

Enter PO and Release Number and Select GO

Advanced Search

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

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	Quant By 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
<b>Recalculate Total</b>	<b>Total (USD)</b>
	<b>23,164.54</b>

# 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 TECHNICIAL			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 interface. At the top, the 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) and a 'Create Invoice' button with a dropdown menu set to 'With a PO' and a 'Go' button.

The main search area is titled 'Search' and includes a note: 'Note that the search is case insensitive'. The search criteria are as follows:

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

Below the search criteria are 'Go' and 'Clear' buttons, both highlighted with red boxes. At the bottom of the search area 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

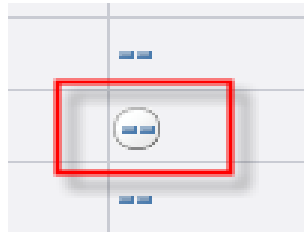
Invoice Number	Invoice Date	Invoice Currency Code	Invoice Amount	Release PO Number	Status	Withdraw	Cancel	Update	View Attachments
32010-4-17-155	31-Aug-2017	USD	16,755.00	<a href="#">32010-4</a>	In Process		...		
32010-1-17-01	11-Oct-2017	USD	300.00	<a href="#">32010-4</a>	In Process		...		
32010-4-17-1999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

**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

Go Clear

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	<a href="#">32010-4</a>	In Process				
32010-1-17-01	11-Oct-2017	USD	300.00	<a href="#">32010-4</a>	In Process				
32010-4-17-1999	25-Sep-2017	USD	10,000.00	<a href="#">32010-4</a>	In Process				
32010-4-17-01R3	29-Sep-2017	USD	1,600.00	<a href="#">32010-4</a>	In Process				
32010-4-17-01R4	29-Sep-2017	USD	200.00	<a href="#">32010-4</a>	In Process				
32010-4-17-1122233	06-Oct-2017	USD	1,700.00	<a href="#">32010-4</a>	In Process				
32010-1-17-19	06-Oct-2017	USD	100.00	<a href="#">32010-4</a>	Unsubmitted				
32010-4-17-40	31-Aug-2017	USD	2.00	<a href="#">32010-4</a>	In Process				
8yr3oihf	06-Oct-2017	USD	0.00	<a href="#">32010-4</a>	Cancelled				
32010-4-001	31-Aug-2017	USD	1.00	<a href="#">32010-4</a>	In Process				



# 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](mailto:eprocsupport@cityofchicago.org)

- **eProcurement for Delegate Agencies:**

[OBMGMU@cityofchicago.org](mailto: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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