

PASSPort Project Update

June 5, 2019



Release 1 ▪ Impact

Release 2 ▪ Now live
 ▪ Functionality
 ▪ Training & Support

Release 3 ▪ Design Update

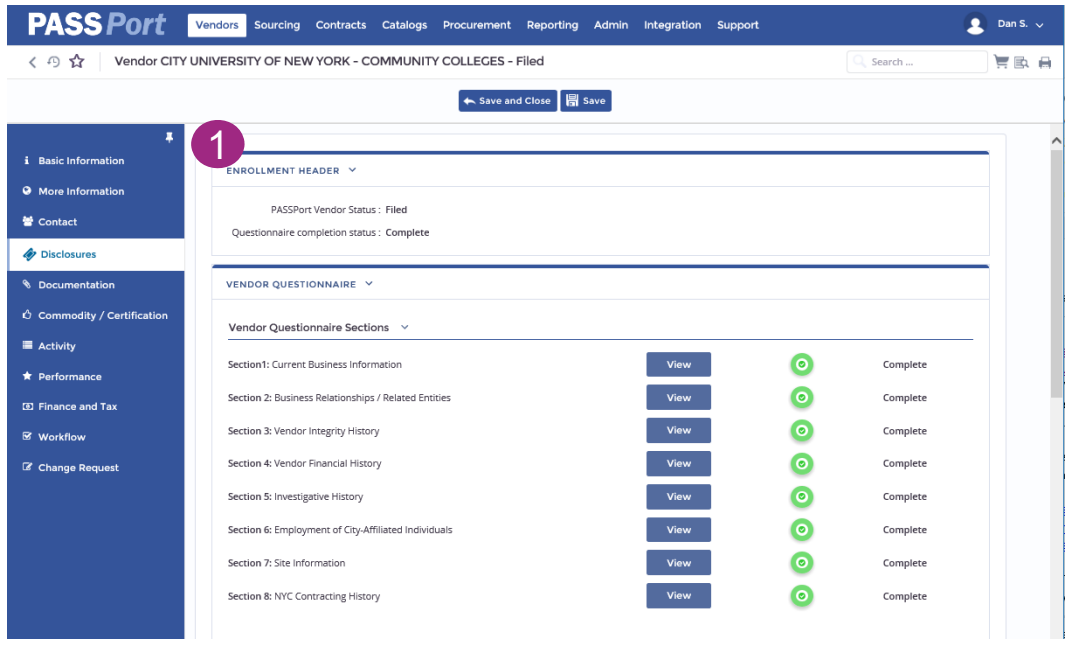
Release 1: Vendor Management

PASSPort Release 1: Vendor Management

Procurement and Sourcing Solutions Portal

 1 month → **1 day** 

Prior process was manual, paper-based. Vendors now manage their account and their information in a self-paced environment. Most vendors can complete the process within a day.



Section	View	Status	Completion
Section 1: Current Business Information	View	🟢	Complete
Section 2: Business Relationships / Related Entities	View	🟢	Complete
Section 3: Vendor Integrity History	View	🟢	Complete
Section 4: Vendor Financial History	View	🟢	Complete
Section 5: Investigative History	View	🟢	Complete
Section 6: Employment of City-Affiliated Individuals	View	🟢	Complete
Section 7: Site Information	View	🟢	Complete
Section 8: NYC Contracting History	View	🟢	Complete

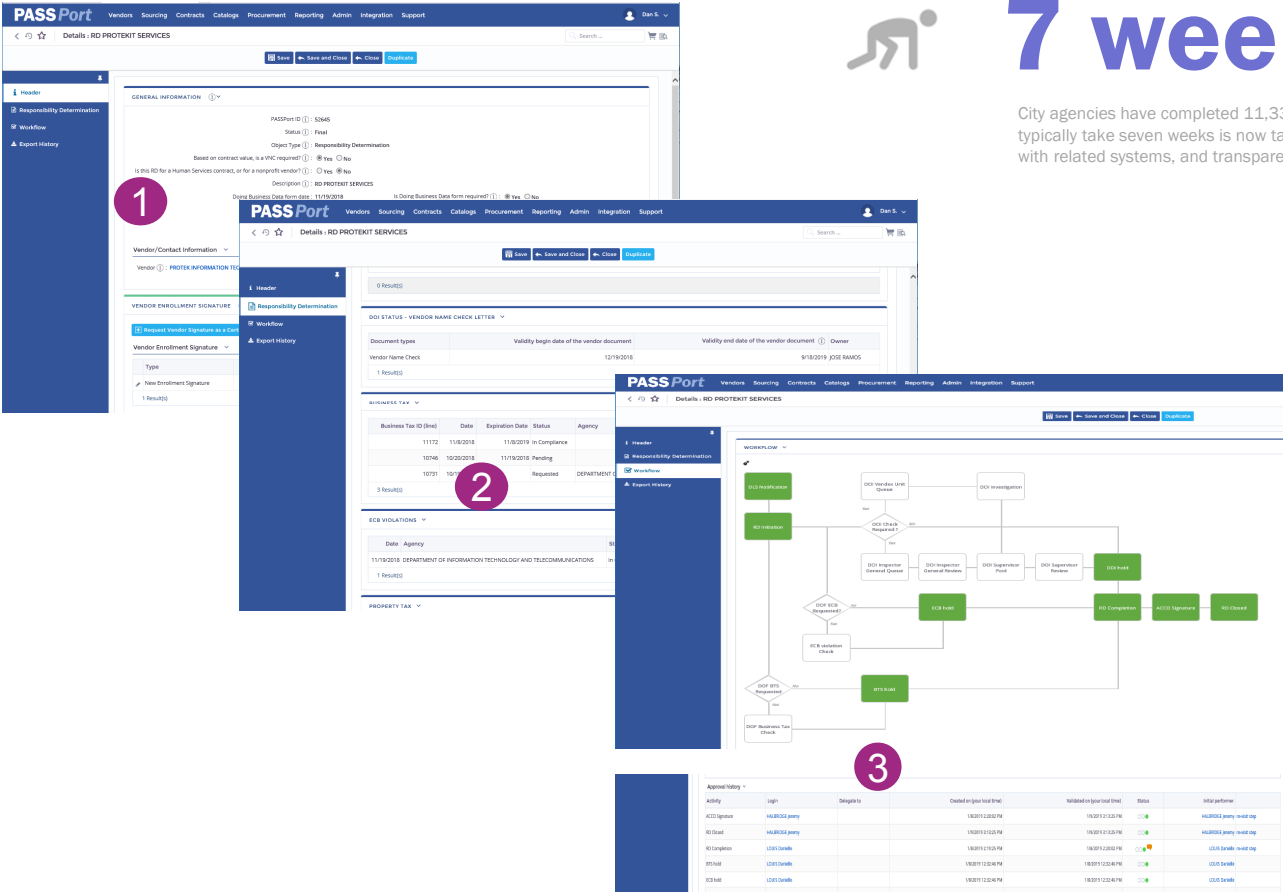
1 VENDEX now online.
Managed in a self-paced environment by vendors

PASSPort Release 1: Responsibility Determinations

Procurement and Sourcing Solutions Portal

 **7 weeks** → **7 DAYS** 

City agencies have completed 11,337 Responsibility Determinations in PASSPort. A process that would typically take seven weeks is now taking seven days because PASSPort enables information sharing, integration with related systems, and transparency around workflow and cycle time.



The image displays three overlapping screenshots of the PASSPort interface. The top screenshot shows the 'GENERAL INFORMATION' section for a Responsibility Determination (RD) with ID 6266, including fields for Status (Final), Object Type (Responsibility Determination), and Description (RD PROTEKT SERVICES). The middle screenshot shows the 'BUSINESS TAX' section with a table of tax records:

Business Tax ID (B#)	Date	Expiration Date	Status	Agency
11172	11/8/2018	11/8/2019	In Compliance	
10746	10/20/2018	11/19/2019	Pending	
10791	10/7		Requested	DEPARTMENT OF INFORMATION TECHNOLOGY AND TELECOMMUNICATIONS

The bottom screenshot shows a 'WORKFLOW' diagram with steps such as 'DDI Investigation', 'DDI Review', 'DDI Approval', 'DDI Completion', 'ACCO Signature', and 'RD Closed'. A '3' is overlaid on the diagram. Below the workflow is an 'Approval History' table:

Activity	Sign	Design Is	Created on (gmt local time)	Validated on (gmt local time)	Status	Initial performer
ACCO Sign-off	MA2002_jenny		18/07/2018 09:29 AM	18/07/2018 09:29 AM	Completed	MA2002_jenny in-act cop
DDI Sign-off	MA2002_jenny		18/07/2018 09:29 AM	18/07/2018 09:29 AM	Completed	MA2002_jenny in-act cop
DDI Completion	CO21_Candice		18/07/2018 09:29 AM	18/07/2018 09:29 AM	Completed	CO21_Candice in-act cop
DDI Sign-off	CO21_Candice		18/07/2018 09:29 AM	18/07/2018 09:29 AM	Completed	CO21_Candice in-act cop
DDI Sign-off	CO21_Candice		18/07/2018 09:29 AM	18/07/2018 09:29 AM	Completed	CO21_Candice in-act cop

- 1 Vendor background and integrity information shared across agencies
- 2 Business Tax and ECB Violation checks through an interface with DOF systems
- 3 Transparent workflows and task management provide real time tracking on status and cycle times

Release 2: Requisition to Pay on Requirements Contracts

PASSPort Release 2: Requisition to Payment

Procurement and Sourcing Solutions Portal

The screenshot displays the PASSPort web application interface. At the top, there is a navigation bar with the PASSPort logo and various menu items: Suppliers, Sourcing, Contracts, Catalogs, Procurement, Invoicing, Analytics, Admin, Config, Integration, and Settings. A user profile for 'Edgar L.' is visible in the top right corner. Below the navigation bar, there is a search bar and a 'Browse Items' section. The main content area shows search results for 'DOW Chemicals' with filters for 'Keywords', 'Commodity', and 'Kits'. The results are sorted by 'By default' and show 16 items per page. A summary sidebar on the right lists the items in the cart, including 'Iuvo Microchannel 5250 Assay' (226.00 USD), 'Iuvo Chemotaxis Assay Plate' (310.75 USD), 'COLORING' (108.30 USD), 'FIXATIVE' (129.78 USD), 'KIT RAPID-CHROME' (256.48 USD), and 'Chitosan' (49.72 USD), with a total of 1,081.03 USD (tax excl.). A 'Go To Requisition' button is located at the bottom of the sidebar. The main grid of items includes:

- Iuvo Microchannel 5250 Assay Plate (226.00 USD)
- Iuvo Chemotaxis Assay Plate (310.75 USD) - Preferred
- INK MARKING (33.90 USD) - Discount
- KIT RAPID-CHROME (256.48 USD)
- FIXATIVE (129.78 USD)
- COLORING (108.30 USD)
- Chitosan (49.72 USD)

Online buying experience on NYC Requirements Contracts

Just went live April 22, 2019

PASSPort Release 2: Functionality – Requisitions

Procurement and Sourcing Solutions Portal

The screenshot shows the PASSPort interface for a Requisition: REQ000007 - Requisition 4 (Pending Agency Approval). The interface includes a top navigation bar with 'PASSPort' and various menu items like 'Vendors', 'Sourcing', 'Contracts', 'Catalog', 'Ordering', 'Receiving', 'Invoicing', 'Reporting', 'Admin', 'Config', 'Integration', 'Settings', and 'Support'. Below the navigation bar, there are buttons for 'Save', 'Forward', 'Reject', 'Approve', 'Cancel Requisition', and 'Duplicate Req.'. The main content area is divided into sections: 'REQUISITION HEADER' (containing status, type, label, requestor, agency, division, and checkboxes for 'Open Order', 'Do Not Ship', and 'Blanket Purchase Order'), 'DELIVERY ADDRESS', 'INVOICING ADDRESS', and 'FUNDING SOURCES'. At the bottom, there is a table of item lines and a summary box showing 'Amount: 14.00 USD'.

#	Ref.	Item Description	Vendor	Ordered Quantity	Unit	Price	Total	Deliv. Date	Add a Comment	Citywide Rule ID	Agency Rule ID
7-2	MF567-125	Sharpie Markers, Box of 12	(Vendor188) Vendor188	1.00	Each	10.00	10.00	12/30/2018			1
7-1	sup-F15	Coffee	(Vendor189) Vendor189	1.00	Each	4.00	4.00	1/11/2019			1

- 1 **Requisition Type:** All requisitions for Release 2 will be Purchase Requisitions.
- 2 **Ship-to Location:** Will be limited to the Agency. Can be set for entire requisition or by an item.
- 3 **Bill-to Location:** Will be limited to the Agency. Can set one address for entire requisition.
- 4 **Item Lines:** Items can be selected from the Hosted Catalog, PunchOut Catalog or from a Non-Hosted Catalog. They inherit their associated commodity. Allocation lines can be edited individually or en masse.

PASSPort Release 2: Functionality – Receipts

Procurement and Sourcing Solutions Portal

Single Receipt: REC000058 - Delivery of 8/7/2018

1 Save Exit Cancel Submit Create return

Receipt

Workflow

HEADER

Status: Draft

Label: Delivery of 8/7/2018

Delivery Date: 8/7/2018

Delivery Address: MOCS Office #1

Vendor: DELL USA

PO: PO000065 - Req. 4/24/2018-DELL USA

Contract: CTR2239001

Request BQA:

ORDER(S)

PO000065	Req. 4/24/2018-DELL USA	1000.00 Each
4/24/2018	DELL USA	

Ordered : 30,000.00 USD

Received : 0.00 USD

Invoiced : 0.00 USD

2 Add an ad-hoc line Add lines from Orders Delete the selection

Label	Qty	Unit	Unit Price	Price	Order	Final Delivery	Substitute Good	BQA Inspection Result	Delivery Date
Latitude E6430	10.00	ea.	1,000.00	10,000.00	PO000065 - Latitude E6430	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	8/7/2018

3 4

2 Result(s)

Amount (tax excl.):	10,000.00	USD
Amount (tax incl.):	10,000.00	USD

- 1 Once the receipt is saved, the user can take various actions to advance the process or make adjustments.
- 2 Users will be able to edit the items lines to reflect what is being received.
- 3 Item lines will be populated if the receipt was flipped from within the PO or created from the Pending Receipt browse screen.
- 4 If BQA Inspection is required for the item(s), results can be entered through the dropdown menu for each line item.

PASSPort Release 2: Functionality – Invoices

Procurement and Sourcing Solutions Portal

< 🔍 ☆ **Browse Invoices**

2 [Create Invoice Deduction](#) [Create Invoice](#) 1

Keywords: Type: Status: Agency: Alerts:
🔍 Search ↩️ Reset 🔍 Advanced Search

Headers

Orders: Contact: Invoice Creator:

Contracts: Invoice Date: to

	ID	Code	Agency	Ordered	Received	Invoiced (Gross)	Invoice Deduction(s)	Total Deduction Amount	Invoiced (Net)	Invoice Date	Invoice Status
🔴	DED178093	123456789	Agency 1							4/29/2018	Canceled
x	INV178092	111111	Agency 2							4/25/2018	Draft
x	DED178091	104	Agency 3	15,865.14 USD	15,865.14 USD	7,760.24 USD	DED 16789 0045667943	100.00 USD	7,660.24 USD	4/25/2018	Approval in Progress
⚠️	INV178090	613	Agency 4	100.00 USD	100.00 USD	100.00 USD			100.00 USD	4/25/2018	OK-to-Pay
x	INV178089	123456	Agency 5							4/25/2018	Matching in Progress
⚠️	INV178088	12345	Agency 1	60.00 USD	60.00 USD	10,000.00 USD	DED178055 788461771	1,200.00 USD	8,800.00 USD	4/19/2018	Disbursed
	INV178087	123	Agency 2	202.00 USD	2.00 USD	202.00 USD			202.00 USD	4/10/2018	Payment in Progress
x	INV178086	5631178	Agency 3	825.00 USD		825.00 USD			825.00 USD	1/8/2018	Approval in Progress

1 Vendors can create and browse for existing invoices using key search features. Invoices must be linked to a dispatched PO and only for items on that PO.

2 Vendors and Invoice Managers can create a deductions linked to an existing invoice.

Training is ongoing for Wave 1 Agencies, with topics targeting specific user groups.



Key

- Requestors
- Requisition Approvers
- Receivers
- Invoice Approvers
- Vendors
- Webinars (Agency + Vendor)

Over 900 agency staff trained. 97% of attendees rated the content Good or Excellent.

<p>COURSE DECKS</p> <p>PowerPoint slides to be used for classroom or webinar training</p>	<p>USER MANUALS</p> <p>Detailed, step-by-step instructions with annotated screenshots</p>	<p>JOB AIDS</p> <p>1-2 pages in word for high impact / high usage procedures (activities)</p>	<p>VIDEOS</p> <p>2-5 minute videos demonstrating a process or activity</p>	<p>ONLINE HELP</p> <p>nyc.gov and Cityshare page FAQs & Factsheets help@mocs contact form</p>
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Release 3: Design Components

PASSPort Guiding Principles

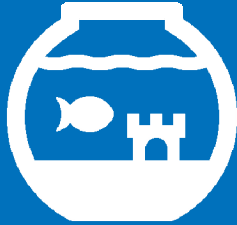
Procurement and Sourcing Solutions Portal



**SUPPORTING
VENDORS AND
AGENCIES WITH
CHANGE**



**CONSTANTLY
ITERATING ON
THE TECH TO
IMPROVE
PROCESSES**



**RADICAL
TRANSPARENCY
LEADS TO
IMPROVED
SERVICE AND
PERFORMANCE**



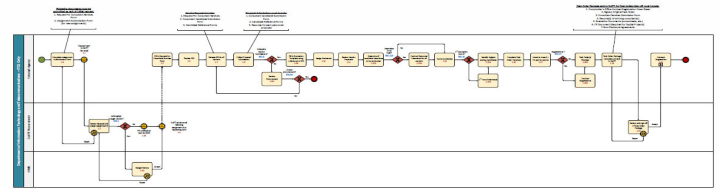
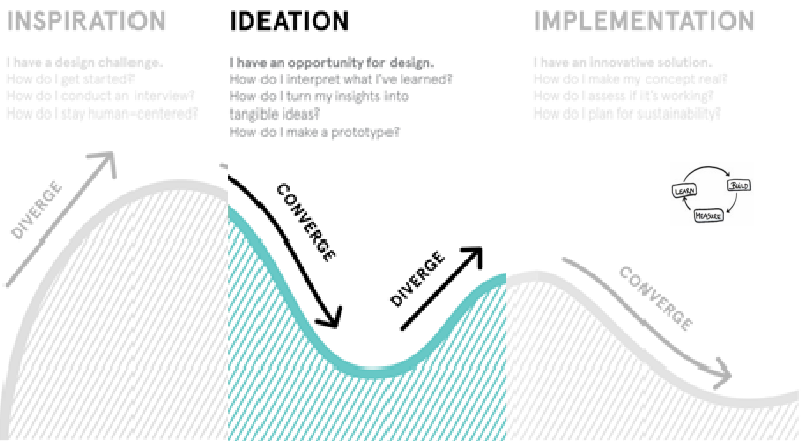
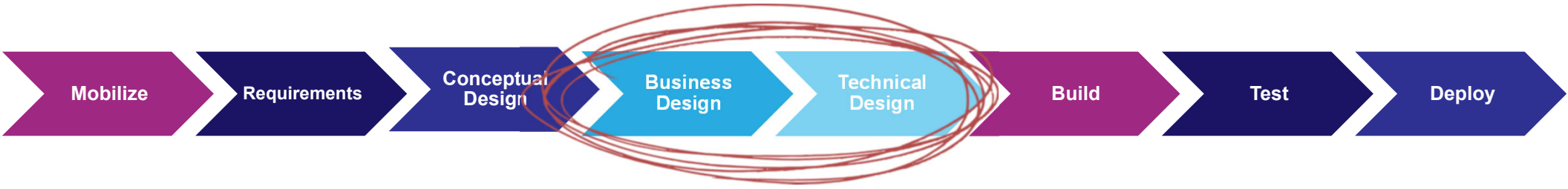
**MOST
COMPLIANCE
MAINTAINED
THROUGH
SYSTEM
FUNCTIONALITY**



**RAISE THE BAR
FOR OUR
PROCUREMENT
WORKFORCE**

PASSPort Release 3: Strategic Approach – Design Process

Procurement and Sourcing Solutions Portal




PASSPort RFX Development: Our Approach

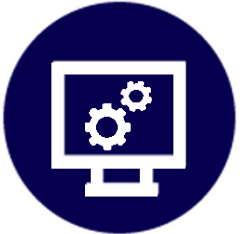
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Objective: Develop standard RFX structure, content library, and support model to optimize solicitation development.



Standardization

- Develop structured but flexible online BID and RFP templates and contract clauses
- Organize information so that content is accessible



Technology

- Standardize and streamline NYC RFP and Bid management process
- Agency manages all steps on one platform
- Vendors create and submit proposals and bids in PASSPort



Collaboration

- Design with agencies and vendors to ensure optimal user experience
- Provide ongoing solicitation management services and continued collaboration with agencies
- Support and process feedback from vendors and city agencies pre- and post-deployment

Links & Support Information



CITYSHARE.NYCNET/PASSPORT

CITY

NYC.GOV/PASSPORT

VENDORS

HELP@MOCS.NYC.GOV

[TRAINING](#) [USER MANUALS](#) [GUIDES](#) [VIDEOS](#)

