

# Catalog Import & Management

Vendors





Welcome to the **Catalog Import & Management** course. Here is a list of topics that will be covered in this course:

1. Course Introduction, Learning Objectives, and Key Changes
2. Lesson 1: Catalog Import Overview and Demonstration
3. Lesson 2: Catalog Management Overview and Demonstration
4. Knowledge Check and Course Summary
5. Q&A

# Learning Objectives

Upon completion of this course, you will be able to:



Understand PASSPort Release 2: Requisition to Pay and the major changes associated with its implementation.



Import a Catalog.



Comprehend the new Catalog Management process.



Understand the approval process for Catalog Management.



Edit and discontinue Catalog items.

# Procurement and Sourcing Solutions Portal (PASSPort)

	 <b>RELEASE 1</b> <b>Vendor Management</b> 	 <b>RELEASE 2</b> <b>Requisition to Pay</b> 	 <b>RELEASE 3</b> <b>Source to Pay</b> 
BENEFITS	<p><b>Replaced Paper VENDEX</b></p> <ul style="list-style-type: none"> <li>• Online, self service vendor accounts</li> <li>• Reduced filing time for vendors</li> <li>• Vetting data shared by agencies</li> <li>• Improved contract performance evaluation management</li> </ul>	<p><b>Enhances Ordering of Goods</b></p> <ul style="list-style-type: none"> <li>• Easier to update and find goods on requirements contracts</li> <li>• Improved ordering/receipt management</li> <li>• Electronic invoicing and better payment tracking (also for R3)</li> </ul>	<p><b>Establishes One Platform</b></p> <ul style="list-style-type: none"> <li>• Transparent workflow management w/oversights (OMB, MOCS, Comptroller)</li> <li>• Digital proposal submission/review</li> <li>• Contract authoring/e-signature</li> </ul>
STATUS	<p>Live (<i>Launched August 2017</i>)</p>	<p>Live (<i>April 2019</i>)</p>	<p>On Target (<i>2020</i>)</p>
NOTES	<ul style="list-style-type: none"> <li>• Vendors enrolled (<i>10,000+ vendors</i>)</li> <li>• Cycle time reduction (<i>27 days to hours for most vendors</i>)</li> </ul>	<ul style="list-style-type: none"> <li>• Goods Purchase</li> <li>• Contract utilization</li> <li>• Unit savings</li> </ul>	<ul style="list-style-type: none"> <li>• Agency utilization</li> <li>• Solicitation volume</li> <li>• Cycle time reduction</li> </ul>

# Phased Deployment

**Wave 1**

MARCH

84 CONTRACTS: FOOD & KITCHEN  
EQUIPMENT

**Wave 2**

MAY

**Wave 3**

JULY

**Wave 4**

SEPTEMBER

# Key Changes

The PASSPort Requisition to Pay implementation will result in a new way for Agencies to shop for goods on vendors DCAS (Department of Citywide Administrative Services) Requirements Contracts. Below are some of the major changes and benefits associated with this new Catalog Management process:

- 1** All goods on DCAS Requirements Contracts will be loaded into an online catalog, creating one central place for Agencies to purchase items and receive invoices.
- 2** The self-service model allows vendors to log in and manage their Catalog information in real-time, ensuring data is up-to-date.
- 3** Agencies can easily search for your items by keywords, images and other search criteria.
- 4** Vendors have the ability to view their list of Catalogs and their current status.
- 5** Vendors can view rejected Catalog imports, including the reasons, on an immediate basis.

These key changes will be highlighted throughout the course as we do demonstrations in the system and review the Catalog Import process.



**LESSON 1:  
IMPORT PROCESS OVERVIEW  
AND DEMONSTRATION**

# PASSPort Release 2 Scope

PASSPort Release 2 spans the Agency purchasing process from Requisition to Payment:

- 1 Catalog Management
- 2 Requisition
- 3 Purchase Order
- 4 Receiving
- 5 Invoicing and Payment

# Import Catalog Overview



To import a Catalog, a vendor will log into PASSPort and upload a template with all required data. DCAS will validate the information and either approve or reject the Catalog. If a Catalog is rejected, an automated email will be sent to the Import Initiator, so they know to revise and resubmit.

Vendor Import Steps		
Vendor logs into PASSPort	Vendor imports catalog template	Vendor reviews items for accuracy and submits for approval

DCAS Approval Steps		
DCAS user views items	DCAS user verifies import data	DCAS user approves correct import data

### Technology

A light blue circular icon containing a white computer monitor symbol.

All goods imported by vendors can be purchased in an online shopping portal throughout the contract validity period.

### Process Improvement

A purple circular icon containing two white interlocking gears.

Vendors can update their item information in real-time so Agency users are not purchasing unavailable or outdated items.

### Transparency

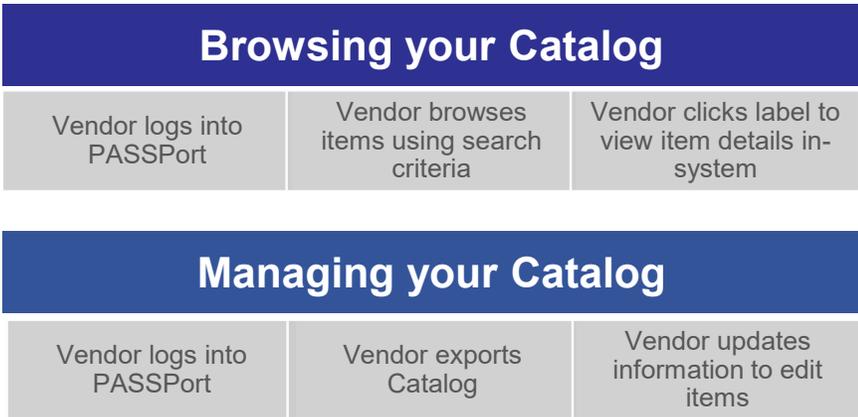
A dark blue circular icon containing a white magnifying glass symbol.

If an imported Catalog is rejected in PASSPort, the initial importer will know right away and will be able to access the DCAS user's rejection notes.

# Catalog Management Overview



Once a Catalog is published, vendors can manage the Catalog by editing their Catalog items. Each of these steps will require the vendor to export their Catalog in order to make changes.



## Technology



Mass updates can be made to Catalog information by exporting the current Catalog as an Excel file

## Process Improvement



Catalog information (including the validity period) can be updated at any time to ensure accuracy

## Transparency



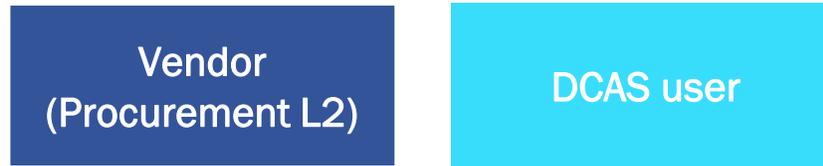
When updating Catalog information, mandatory information on the import template is indicated by columns that are highlighted in red

# Tracking the Status of a Catalog Import

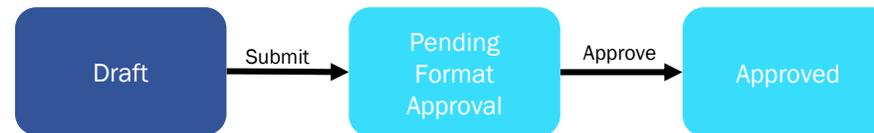
Catalog Status	Definition
Draft	The Catalog import is drafted and not yet submitted for approval.
Format Pending Approval	The Catalog has been submitted to DCAS and is pending approval.
Approved	The Catalog has been approved by DCAS and items are available for purchase by other City Agencies.
Canceled	The Catalog import has been canceled by the import initiator.
Rejected	The Catalog import has been rejected by DCAS due to errors, returned to the import initiator for revisions, and has moved back to Draft.

# Catalog Import Workflow

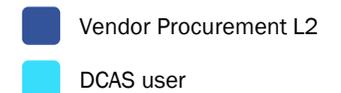
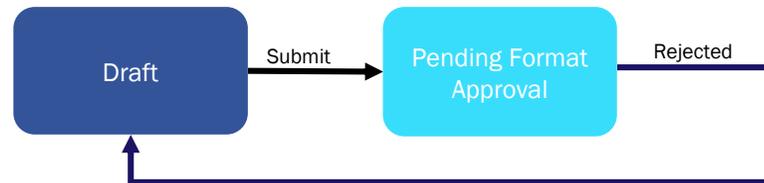
We will now review the Catalog import workflow, which is the path your Catalog will take after you submit it. The following roles are involved:



Based on these roles, this is the workflow that will occur in PASSPort after you submit your Catalog for approval. For clarity, we have color-coded the workflow on this slide to allow you to easily see which role is involved with each step of the process:



If the Catalog import is rejected by DCAS, it will return to the Draft workflow step. The initial importer will receive a notification informing them of the rejection, with notes explaining the rejection reason.



# Catalog Import Template

Product code	Product Label	Commodity Type	Commodity Code	Manufacturer Code	Link to manufacturer catalog	Product Vendor Ref.	Summary	Keywords	Description	Image
50001	Hanging File Folders, Box of 25	NIGP	61543	MF123		FF609923	Hanging File Folders, Letter Size, Box of 25, Color: Green	Hanging folders, file folders, letter sized file folders, filing, paper storage	This 25-pack of green letter-size hanging file folders holds up against wear and tear. The durable coated hangers are made from 10% post-consumer material and fits easily in a file drawer or in a desktop filing system.	Hanging_File_Folders.jpg
50002	Cat Tape Dispenser	NIGP	61588	MF234		TD782118	Cat-Shaped Tape Dispenser, takes 1" core tape up to 3/4" wide	Tape Dispenser, tape, Scotch tape	This cat-shaped plastic tape dispenser is perfect for the office or for home. It fits 1" core tape, up to 3/4" wide and 41.67 yards long. One roll of matte-finish, invisible Scotch tape is included. Multicolor options, color choice not available. 4.8" H x 2.6" D	Tape_Dispenser.jpg
50003	12" Acrylic Ruler	NIGP	61579	MF345		RU634578	12" Acrylic Ruler with Hang-up Hole	Ruler, Acrylic, Metric Ruler, Inch Ruler, Measurements, Measuring	This flexible acrylic ruler offers precise measuring in inches or centimeters. It's transparent for ease of use, durable, and offers a hang-up hole for convenient storage. Measures up to 12" or 30cm.	Ruler.jpg
50004	Multicolor Paper Clips, Box of 100	NIGP	61569	MF456		PC439877	Vinyl-Coated Steel Paper Clips, Box of 100, Assorted Colors, 1.5" long	Paper Clips, Organization, Multicolor, Assorted Paper Clips	These 1.5" paper clips are made of vinyl-coated steel and come in an assortment of colors. Each box contains 100 paper clips in our signature color scheme.	Paper_Clips.jpg
50005	Sharpie Markers, Box of 12	NIGP	62090	MF567		SM340980	Sharpie Fine Point Permanent Markers, Box of 12, Color: Black	Sharpie, Markers, Permanent Markers, Fine Point, Writing Utensils, Writing Instruments, Black Markers	This box of 12 Sharpie Permanent Markers in black uses waterproof, smear proof, and fade-resistant ink. They are AP certified nontoxic and write on most surfaces. The fine tip allows for precise writing on paper, metal, plastic, and many other surfaces. 5.9" L X 1.5" DIA.	Sharpie.jpg

## Required Fields (highlighted in red):

- Product Code
- Product Label
- Commodity Type
- Commodity Code
- Item Code
- Item Label
- FMS Vendor Code
- Contract
- Validated from (included)
- Item Public Price
- Negotiated Price
- Negotiated Quantity
- Unit

Completion of the "Image" and "Keywords" fields allow for an optimal search experience.

# Catalog Import Walkthrough



## Draft Catalog Import

### Importing a Catalog

To import a Catalog, vendors will enter all required information and any additional details into a template. The vendor then uploads this template to PASSPort, and should review the alerts to ensure there are no formatting issues or discrepancies that need to be addressed before they submit the imported Catalog for approval.

■ Completed task ■ In progress ■ Not started ■ System step

# Catalog Import Walkthrough



## Pending DCAS Approval

### Pending Format Approval

Once a Catalog file is submitted, a DCAS user will need to log into PASSPort to review the catalog information. DCAS will be examining the item information line by line to ensure that it matches the data provided for the contract.

If the Catalog information does not match the contract data, the DCAS user will reject the imported file. This will return the import to the initial importer for revision. DCAS will be required to provide notes detailing the reason for returning the file when rejecting any Catalogs.

 Completed task  In progress  Not started  System step

# Catalog Import Walkthrough



Published

## Approved

If DCAS approves a Catalog import, the items are then published within PASSPort for Agency users to purchase. Items are able to be purchased until the Validity End Date associated with the contract, unless a specific validity period is defined for the individual item.

■ Completed task ■ In progress ■ Not started ■ System step



We will now demonstrate how to import a Catalog in PASSPort and submit for approval.

# Course Summary

You have reached the end of this course. You should now be able to:



Understand PASSPort Release 2: Requisition to Pay and the major changes associated with its implementation.



Import a Catalog.



Comprehend the new Catalog Management process.



Understand the approval process for Catalog Management.



Edit and discontinue Catalog items.

# Vendor Resources: Online and In-Person

The screenshot shows the NYC Mayor's Office of Contract Services website. The header includes the NYC logo, the text 'Mayor's Office of Contract Services', and a search bar. The main navigation menu includes 'About', 'Systems', 'Legal & Forms', 'Reporting', 'Partners', and 'Contact'. Below the navigation, there are three buttons: 'System Login', 'PASSPort', and 'HHS Accelerator'. The main content area features the title 'PASSPort Requisition to Pay Resources' and an 'About' section. The 'About' section describes the release of PASSPort 2.0, which allows agency users to search for and purchase items from Citywide Administrative Services (DCAS) or Department of Information Technology and Telecommunications (DoITT) Requirements Contracts. It mentions that the first wave will bring 86 (primarily food) contracts into PASSPort. A link to 'R2: Requisition to Pay Factsheet' is provided. Below this, there is a 'Training' section that offers in-person training in Downtown Manhattan and live webinars, with a note that registration is required. A link to 'Updating Your Catalog In PASSPort' is also present, with a sub-link for 'PASSPort Role: Procurement L2'.

## Vendors

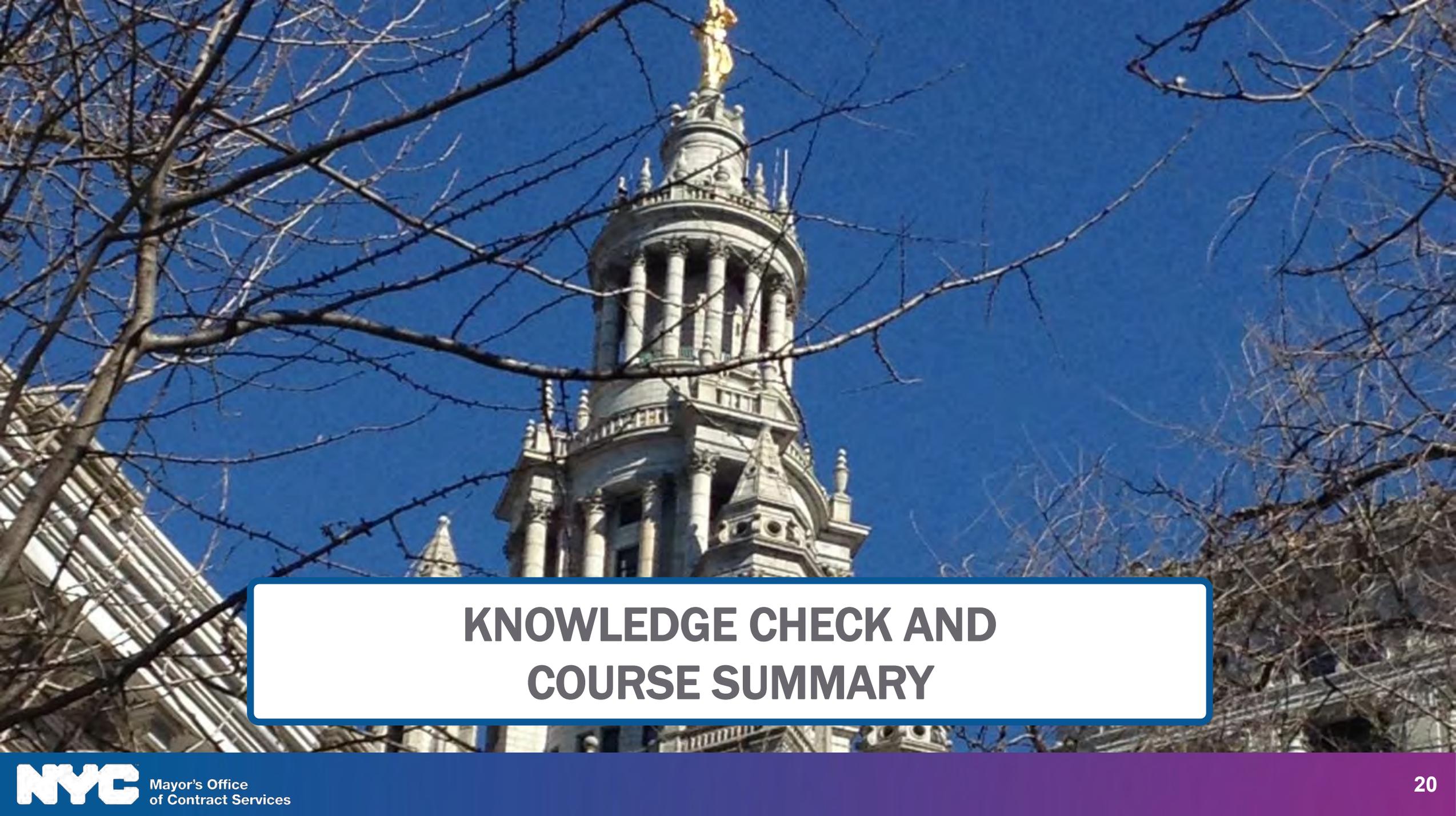
All vendor user materials and training registration can be accessed from the PASSPort page of the MOCS website:

<https://www1.nyc.gov/site/mocs/systems/passport-requisition-to-pay-resources.page>

- Help Desk
- Videos
- Trainings
- Guides
- FAQ

MOCS Help Desk

[help@mocs.nyc.gov](mailto:help@mocs.nyc.gov)



## KNOWLEDGE CHECK AND COURSE SUMMARY

# Knowledge Check 1 – Multiple Choice

Which criteria below cannot be used to search the catalog in PASSPort?

A Keyword

B Contract

C Shipping Mode

D Status

That is correct.

# Knowledge Check 2 – True or False

Vendors can add images directly to their Catalog template.

True

False

That is correct. Vendors can add the file name of the image to their template, and upload a zipped file of the template and images into PASSPort.

# Knowledge Check 3 – Multiple Choice

Which of the below is not a required field on the template?

A Negotiated Price

B Image

C Commodity Code

D FMS Vendor Code

That is correct.

# Knowledge Check 4 – True or False

Vendors can edit item details and validity periods within PASSPort on the “Manage my Catalogs” page.

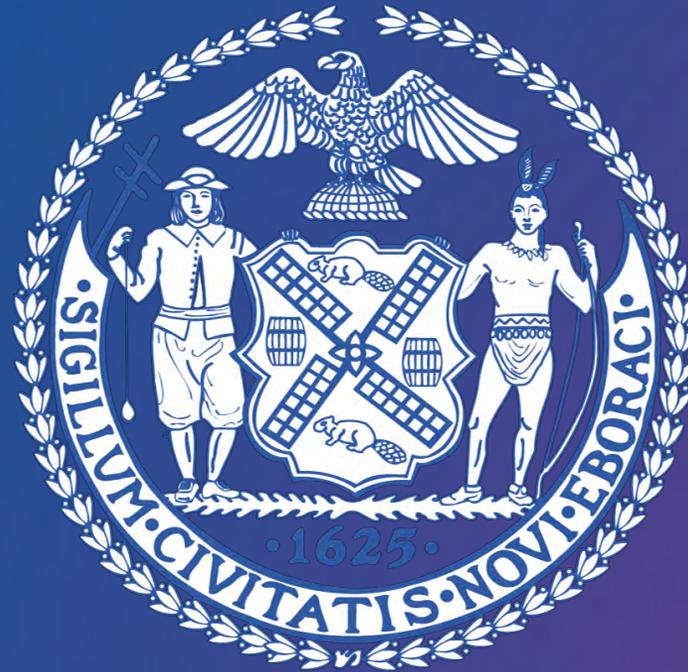
True

False

That is correct. Vendors must export their Catalog in order to edit item details or to discontinue items.

What  
questions  
do you  
have?







**LESSON 2:  
CATALOG MANAGEMENT  
OVERVIEW AND DEMONSTRATION**

# Demonstration: Import a Catalog

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We will now demonstrate how to browse a Catalog, edit Catalog items, and discontinue a Catalog item in PASSPort.