

PASSPort

Procurement and Sourcing Solutions Portal

Catalog Management for Vendors

<p>Roles Involved:</p> <ul style="list-style-type: none">• Vendor Admin• Vendor Procurement L1 & L2	<p>Summary:</p> <p>Step-by-step instructions on how to manage catalogs in PASSPort.</p>
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Last Updated: April 19, 2019

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Accessing PASSPort

To access PASSPort and log in, go to <http://cityshare.nycnet/passport>

Note: While navigating PASSPort, you can easily increase its font size and readability. To do this, click the “ctrl” and “+” keys simultaneously on your keyboard. Each time you click these keys, your web browser will zoom in and PASSPort will resize accordingly. To reduce PASSPort’s font size, simultaneously click the “ctrl” and “-“ keys.

1. Catalog Management Overview

This user manual provides you with step-by-step instructions for managing Catalogs in PASSPort. For more information about Catalog Management, please visit the MOCS PASSPort User Materials page.

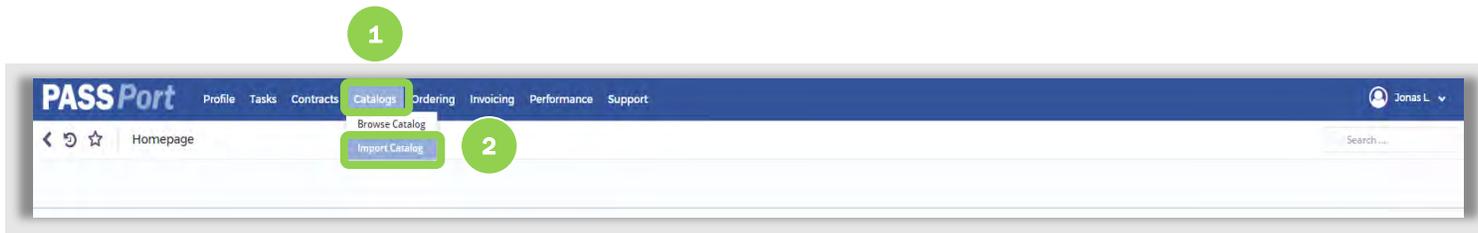
Vendors who are currently doing business with the City of New York via DCAS requirements contracts are encouraged to complete the Catalog Management process. To complete the Catalog Management process, you must first create a PASSPort account (please refer to the Account Creation Manual or Job Aid at <http://www.nyc.gov/passport>). When you have completed the Vendor Account Creation process, log into PASSPort to import your Catalog.

To initiate the import process, users provisioned with Vendor Admin or Vendor Procurement L2 access will import their Catalog and submit the Catalog for approval. Once the Catalog has been submitted for approval, a DCAS user will validate the uploaded Catalog and determine whether to approve or reject the file. Items will be available in PASSPort for Agencies to purchase off of a registered contract only after they are approved. If the import is rejected, the Catalog will be returned to the import initiator for revision.

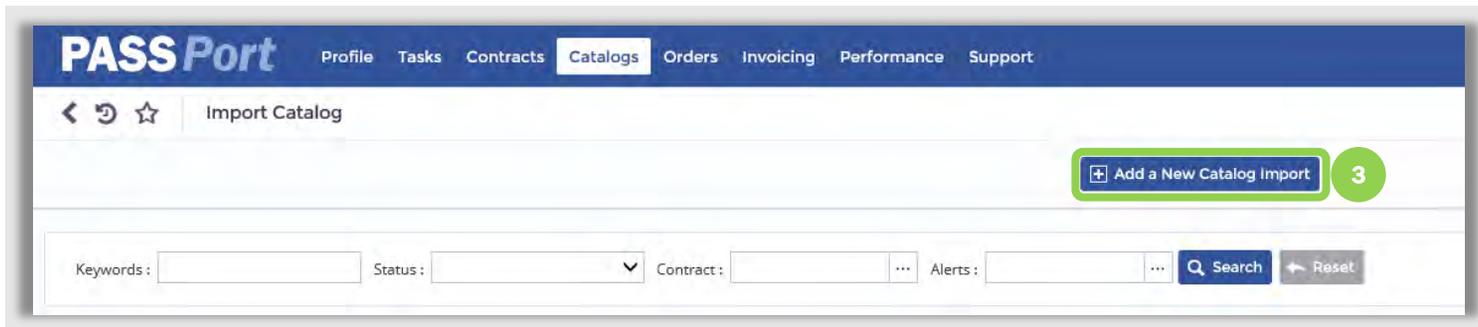
Once a Catalog is imported and approved, vendors can manage their imported items by reviewing, editing, and expiring these items in one centralized system. The Contracting Agency can then use this information to easily create Requisitions and purchase items from vendors.

2. Importing a Catalog

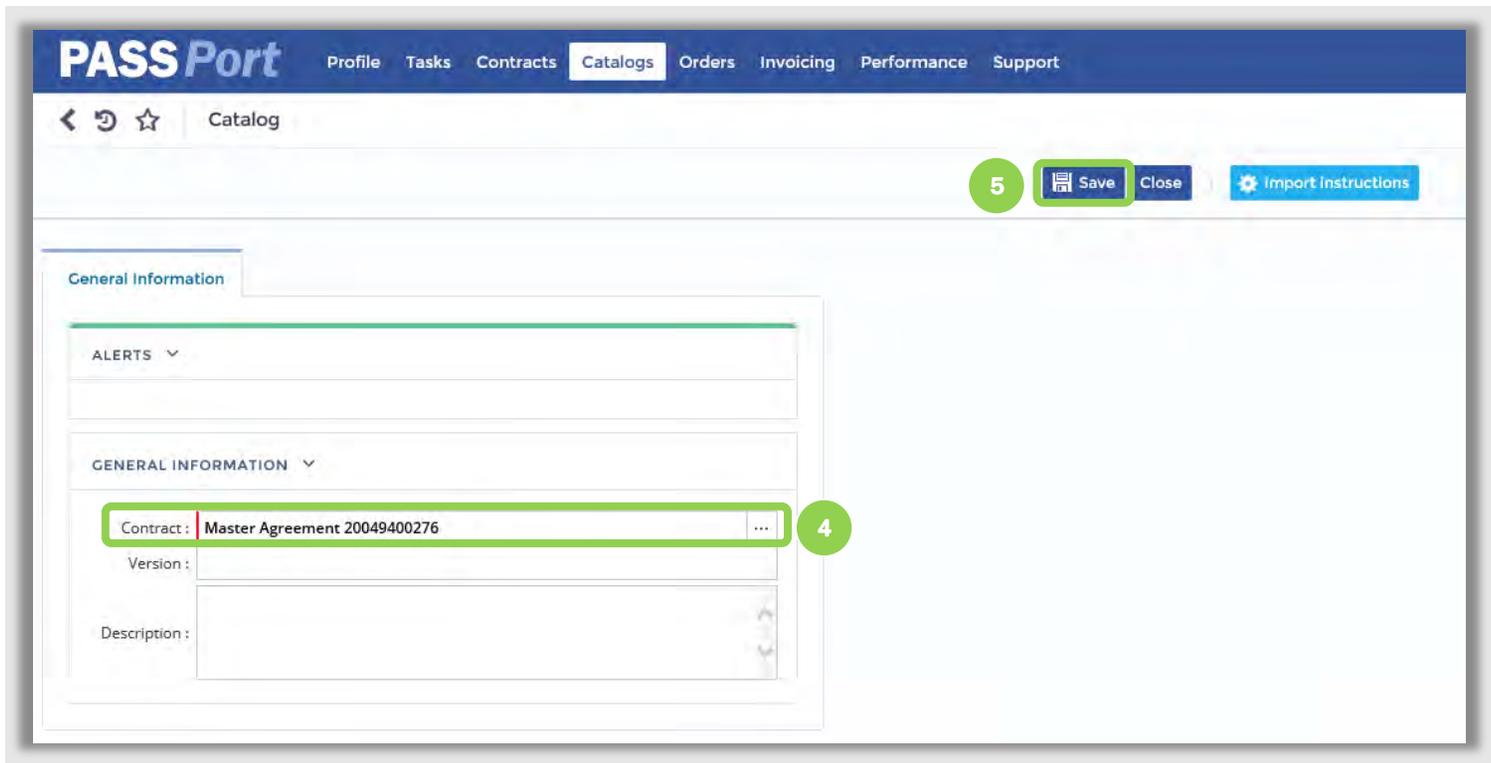
PASSPort allows users provisioned with Vendor Admin or Vendor Procurement L2 access to import Catalogs as necessary. Once the Catalog file is imported, an Agency user will review the import to ensure all data matches the agreed terms and details for each item. If the Agency user finds any discrepancies or there are any issues with the file, they will reject the submission in the system. This will trigger an automated email alerting the initial importer to review and reupload the catalog. You can find the fields and description of a Catalog template starting on page 9.



1. From any page in PASSPort, click the **“Catalogs”** header at the top of the page.



2. Select **“Import Catalog”** from the drop-down menu.
3. Click the **“Add a New Catalog Import”** button.



- 4. Enter a contract for the import in the “Contract” field.

Note: To search for a contract in this field, you may enter the contract or select the “...” to view all listed contracts.

- 5. Click the “Save” button.

PASSPort Profile Tasks Contracts **Catalogs** Orders Invoicing Performance Support

← ↻ ☆ Catalog

Save Close Import Instructions

General Information

GENERAL INFORMATION

Contract: Master Agreement 20049400276
Version:
Description:

EXTRACT CURRENT CATALOG

Extract existing items on Excel:
Allow to modify the existing data massively before uploading the new file.

Download Current Catalog **6**

LOAD NEW CATALOG

File to import: Browse... **Add File To Upload List** **Download Import Template**

Add A Comment

Comment

7

Do you want to open or save Current_Catalog.xlsx from nyc-env.ivalua.us? **Open** Save Cancel

- Click the “Download Current Catalog” button.

Note: If this is your first time and there is no Catalog uploaded for your organization, you can click the “Download Import Template.”

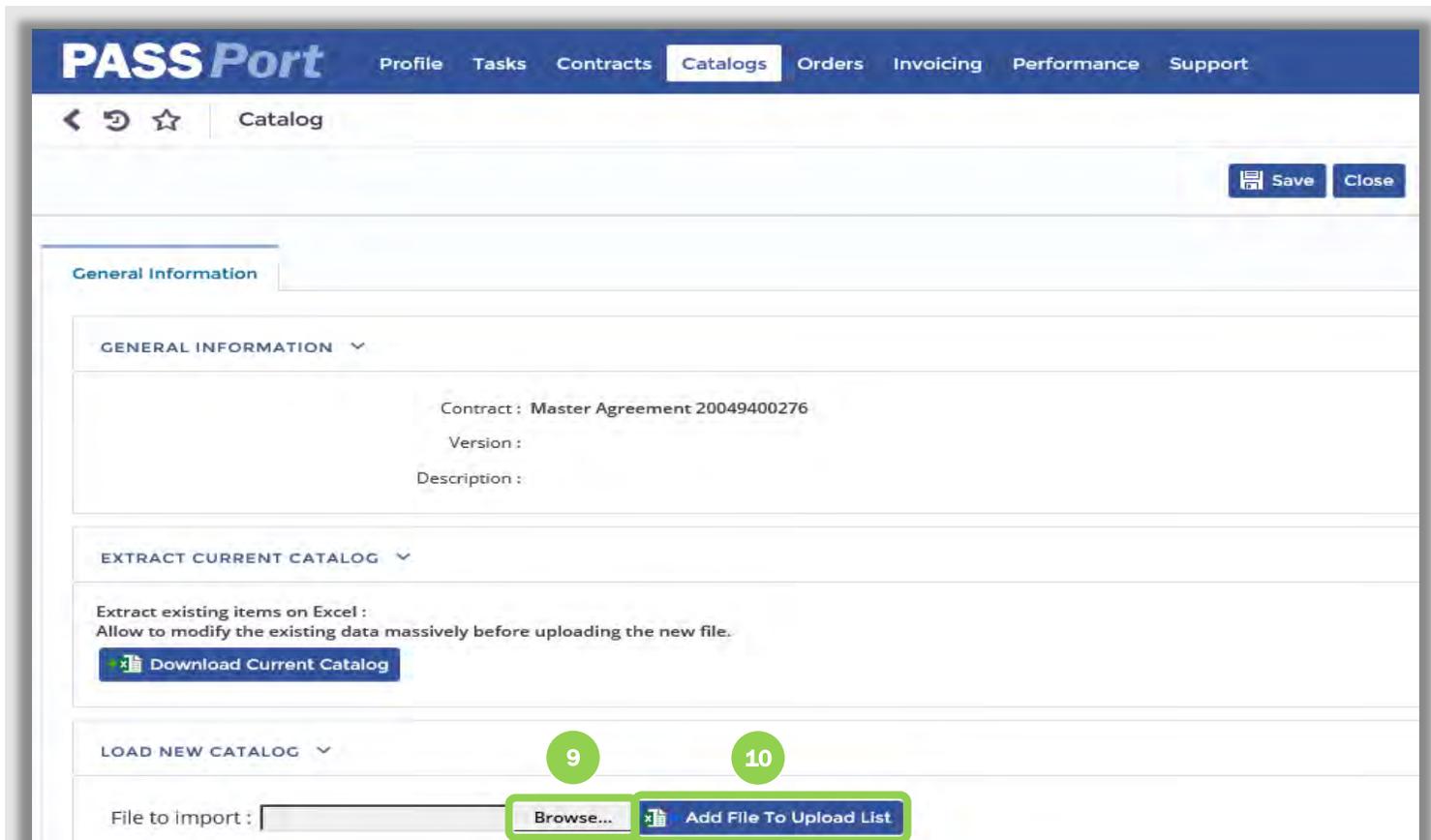
- Then click “Open” to view the file.

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Product Code	Product Name	Manufacturer Code	Manufacturer Name	Link to manufacturer website	Product Vendor Ref.	Summary	Keywords	Description	Image	Documents	Item Vendor Ref.	Item Vendor Name	Link to Vendor catalog	Contract	Account	Item Vendor Code	To (included)	
F25	Fresh Pizza	NCP	37554	MP809	1234567	Round 12-inch plain pizza	pizza, cheese, round	Flattened 12-inch round dough topped with tomato sauce and cheese. May come with different toppings or an additional cost.	Pizza.jpg	F25	Fresh Pizza	000000000202	nyc-F25	www.nyc.gov/proc	200956000632	123400	39242018	12/31/2018
F73	Yogurt	NCP	38080	MF122	5432109	Chobani greek yogurt	yogurt, greek	Non-fat, greek yogurt, 5.3oz. Available in plain or different flavors (strawberry, cherry, etc.)	Chobani Yogurt.jpg	F73	Yogurt	000000000202	nyc-F73	www.chobani.com	200956000632	123400	39242018	12/31/2020
F85	Coffee	NCP	38934	MF255	9876543	Nescafe 3.5oz coffee	coffee, instant, dark roast	Instant dark roast coffee, makes 50 cups, 3.5oz	Nescafe Coffee.jpg	F85	Coffee	000000000202	nyc-F85	www.nestle.com	200956000632	123400	39242018	12/31/2020
F2	Milk	NCP	39375	MF520	5678901	1 gallon whole milk	milk, reduced-fat, whole	1 gallon of milk, available in whole, organic, fat-free, low-fat	Milk.jpg	F2	Milk	000000000202	nyc-F2	www.nyc.gov/proc	200956000632	123400	39242018	12/31/2020
F12	Juice	NCP	38360	MF475	1357913	64oz Apple Juice	juice, apple, 100%	64oz apple juice containing a blend of apples, 100% natural, no added sugar	Apple Juice.jpg	F12	Juice	000000000202	nyc-F12	www.nyc.gov/proc	200956000632	123400	39242018	12/31/2020

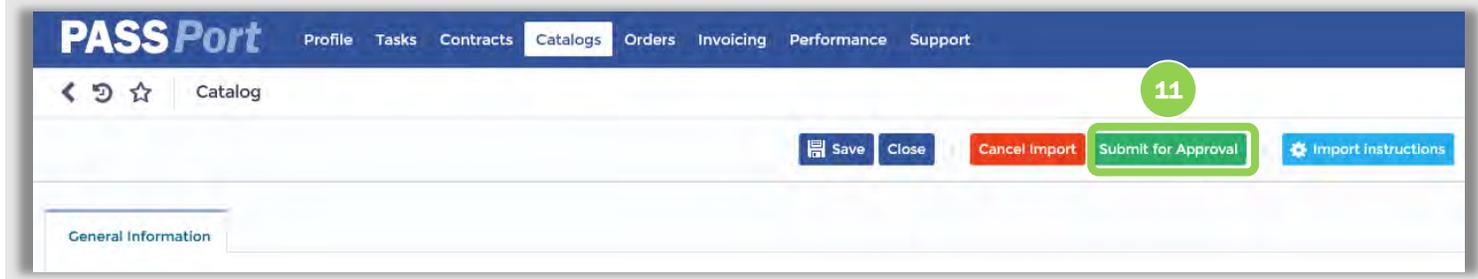
- Add updated or new items to the current Catalog template and save the file to your computer.

Note: Images cannot be uploaded by adding them to the template directly. Instead, you must create a folder on your computer and save the template within the folder, along with all associated images. You will then need to zip the folder. If uploading a zip folder with images, that image file name must match exactly what is in the template (“Image” field), in order for images to upload successfully.



9. Click “Browse” to search for your Catalog. Select the catalog file you wish to upload.

10. Click the “Add File To Upload List” button.



11. Click the “Submit for Approval” button.

Your Catalog has now been submitted to the catalog approver for approval. If the import is rejected, the Catalog

will be returned to the
import initiator for
revision.

Note: The table below contains the fields and description of a Catalog template. All field names marked with an * are required fields.

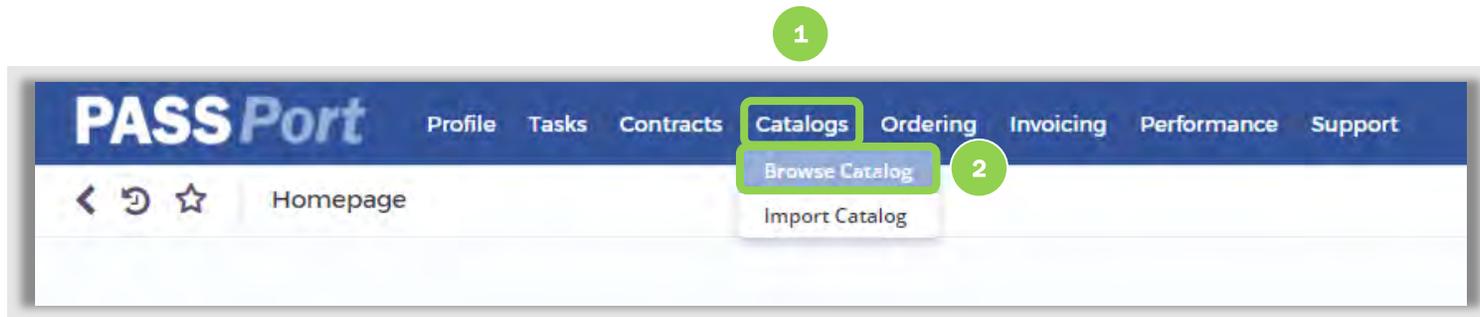
Field Name	Description	Notes
Product Code*	Code of the product the item is attached to	For a contract, each item requires a unique code. The same code should be listed in the “product_code” and “item_code” fields. Codes are alphanumeric and don’t include spaces.
Label*	Name of the product/Product label for the catalog item	Enter the same text in the “product_label” and “item_label” fields.
Commodity Type*	The type of commodity code (NIGP, UNSPSC, NAISC) that is entered in the commodity_code field.	
Commodity Code*	Commodity to which the item is attached	For NIGP codes, enter the 5-digit code. For NAICS and UNSPSC enter any level code.
Manufacturer Code	Vendor’s internal/ERP code for the product	
Link to Manufacturer Catalog	URL link to manufacturer catalog	
Product Vendor Ref.	Manufacturer's reference code for the product	
Summary	Summary of the Product the Item is linked to	This summary will be visible to requestors while browsing the online catalog.
Keywords	Allows to associate keywords with the product in order to facilitate searching in the catalog	This field is critical in making an item searchable in PASSPort. When a requestor does a keyword search, PASSPort will be searching this field associated with each item.
Description	Description of the Product the Item is linked to	From the browse screen, the requestor can click on an item to view the description.
Image	Name of product image file associated with the Product sheet	Only 1 image per item. The exact file name of the image needs to be entered into this field (i.e. “stapler.jpg” for an image of a stapler).
Documents	Any specification file attached to the product	
Product Label*	Code assigned to the item in the Price sheet	For a contract, each item requires a unique code.

		<p>Enter the same code in the “product_code” and “item_code” fields.</p> <p>You may use an existing product code or you can create a new one for PASSPort.</p> <p>Codes are alphanumeric and don’t include spaces.</p>
Item Label*	Label of the item in the Price sheet	Enter the same text in the “product_label” and “item_label” fields.
FMS Vendor Code*	Vendor proposing this item with the conditions written in the Price sheet	
Vendor Contact (Item Vendor Email)	Email of the Vendor Contact	
Item Vendor Ref.	Manufacturer's reference code for the item	
Link to Vendor Catalog	URL link to the Vendor catalog	
Contract*	Reference for Contract associated with the item	This information is provided in the email you received from DCAS.
Account	General ledger account to which the item is attached	
Validated from (included)*	Validity start date for the item	<p>This date is the same as the start date of the contract.</p> <p>Use date format mm/dd/yyyy</p>
To (excluded)	Validity end date for the item	<p>This date is the same as the end date of the contract.</p> <p>Use date format mm/dd/yyyy</p>
Option type	Values: 0 or 1. 1 Indicates whether it’s a regular item or an optional item that can be attached to other items.	Enter “1” if this is an option item that can only be ordered with other items.
Item Comment	Additional information for the item.	
Item Public Price*	Retail price for the item	Do not enter a dollar sign
Negotiated Price*	Negotiated price per the attached contract	Do not enter a dollar sign
Item Quantity A Negotiated	Negotiated quantity within the attached contract	
Negotiated Price For Quantity A	1st tier Negotiated price at the associated negotiated quantity per the attached contract	Do not enter a dollar sign

Item Quantity B Negotiated	Negotiated quantity within the attached contract	
Negotiated Price For Quantity B	2nd tier Negotiated price at the associated negotiated quantity per the attached contract	Do not enter a dollar sign
Item Quantity C Negotiated	Negotiated quantity within the attached contract	
Negotiated Price For Quantity C	3rd tier Negotiated price at the associated negotiated quantity per the attached contract	Do not enter a dollar sign
Item Quantity D Negotiated	Negotiated quantity within the attached contract	
Negotiated Price For Quantity D	4th tier Negotiated price at the associated negotiated quantity per the attached contract	Do not enter a dollar sign
Item Quantity E Negotiated	Negotiated quantity within the attached contract	
Negotiated Price For Quantity E	5th tier Negotiated price at the associated negotiated quantity per the attached contract	Do not enter a dollar sign
Negotiated Quantity*	Negotiated quantity for the price quoted	
Unit*	Unit used to count or measure the item	
Other Units	Code for other units that can be used to count or measure the item	
Packaging	Type of packaging used by the Vendor for this item	
Lead Time	Delivery time announced by the Vendor (in days)	
Shipping Mode	Shipping mode for the item	
Incoterm / Incoterm Location	Code for the Applicable Incoterm	
Incoterm / Incoterm Location	Applicable Incoterm location	
Substitute Item	When an item is no longer available, you can select a substitute item	
Flexible Price	Populating 'Yes' will allow requestor to modify price on req and 'No' will not allow requestor to modify price on a req.	If an item's price is negotiable, select "yes" in this field. Selecting "yes" gives a requestor the ability to update the price when they are purchasing the item in PASSPort.
Specific Discounts	Negotiated prices and quantities	
Warranty	Warranty specific to the item	
Return Policy	Return Policy specific to the item	

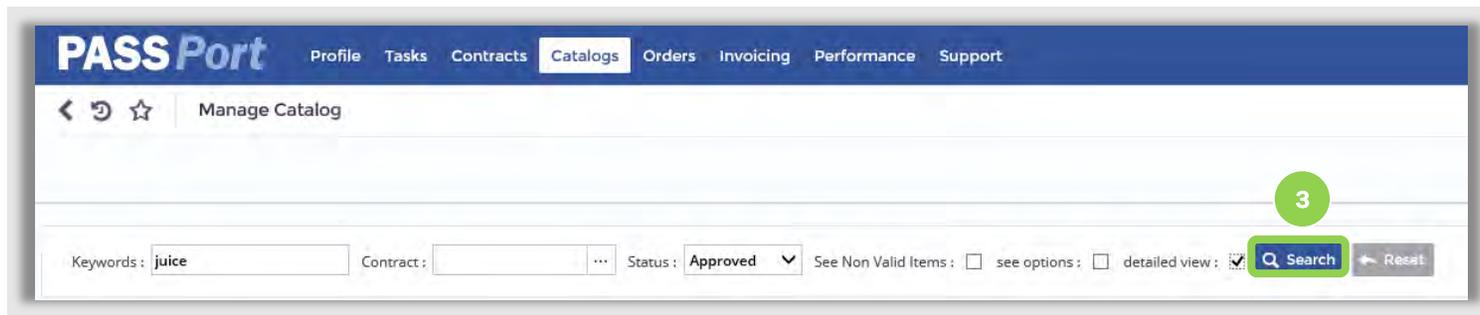
3. Browse Catalogs

PASSPort allows users provisioned with Vendor Admin, Vendor Financials L1, Vendor Financials L2, Vendor Procurement L1, or Vendor Procurement L2 access to easily search for and view their organization’s Catalog items after they have been imported. Follow the below steps to search for and review a previously imported Catalog.



1. From any page in PASSPort, click the “Catalogs” header at the top of the page.
2. Select “Browse Catalog” from the drop-down menu.

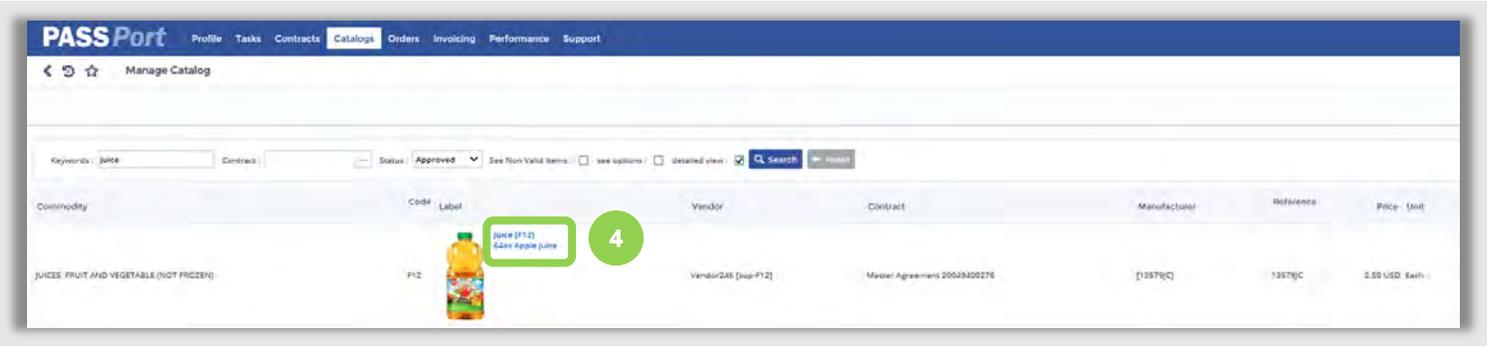
The **Browse Catalog** page is displayed. From this page, all users mentioned above can search for items imported to PASSPort.



3. Once your search terms are entered, click the “Search” button.

Note: Select the “detailed view” checkbox next to the “Search” button to access item details.

- 4. Once you find the item you wish to view, click the hyperlink under the “Label” column to open the item and view the item details.



The Item’s **Product Information** is displayed. On this page, you will see the product code, PunchOut information, vendor contact, validity dates, status, and shipping details. There is also a photo (if provided), detailed description, features, and options box, as well as a **Price**

PASSPort
PROCUREMENT AND Sourcing SOLUTIONS PORTAL

Item sheet Close



2.50 USD

Juice

JUICES; FRUIT AND VEGETABLE (NOT FROZEN)

Manuf: Ref: F12

Details ▾

Product : Juice

Code : F12

Vendor : [Vendor246 111111476](#)

Contract : [Master Agreement 20049400276](#)

PunchOut :

Vendor Contact :

Catalog Link :

Validity Start Date : 10/24/2018

Validity End Date : 12/31/2020

Status : Approved

Packaging : Crates

Delivery Delay : 30 Day(s) Shipping mode: ::

Incoterm : Incoterm Location: ::

Price ▾

Retail Price : 3.50 USD

Negotiated Price : 2.50 USD

Negotiated Quantity : 100.00 Each

Public Price :

Description ▾

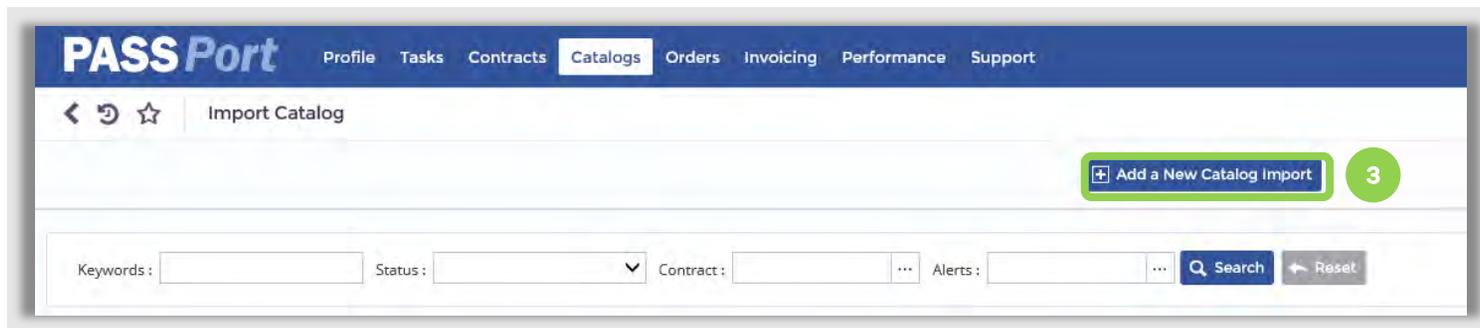
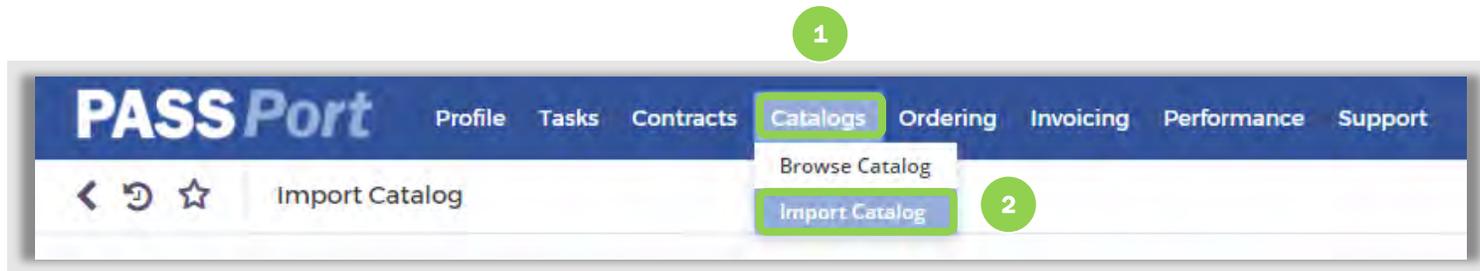
64oz apple juice containing a blend of apples; 100% natural; no added sugar

Features ▾

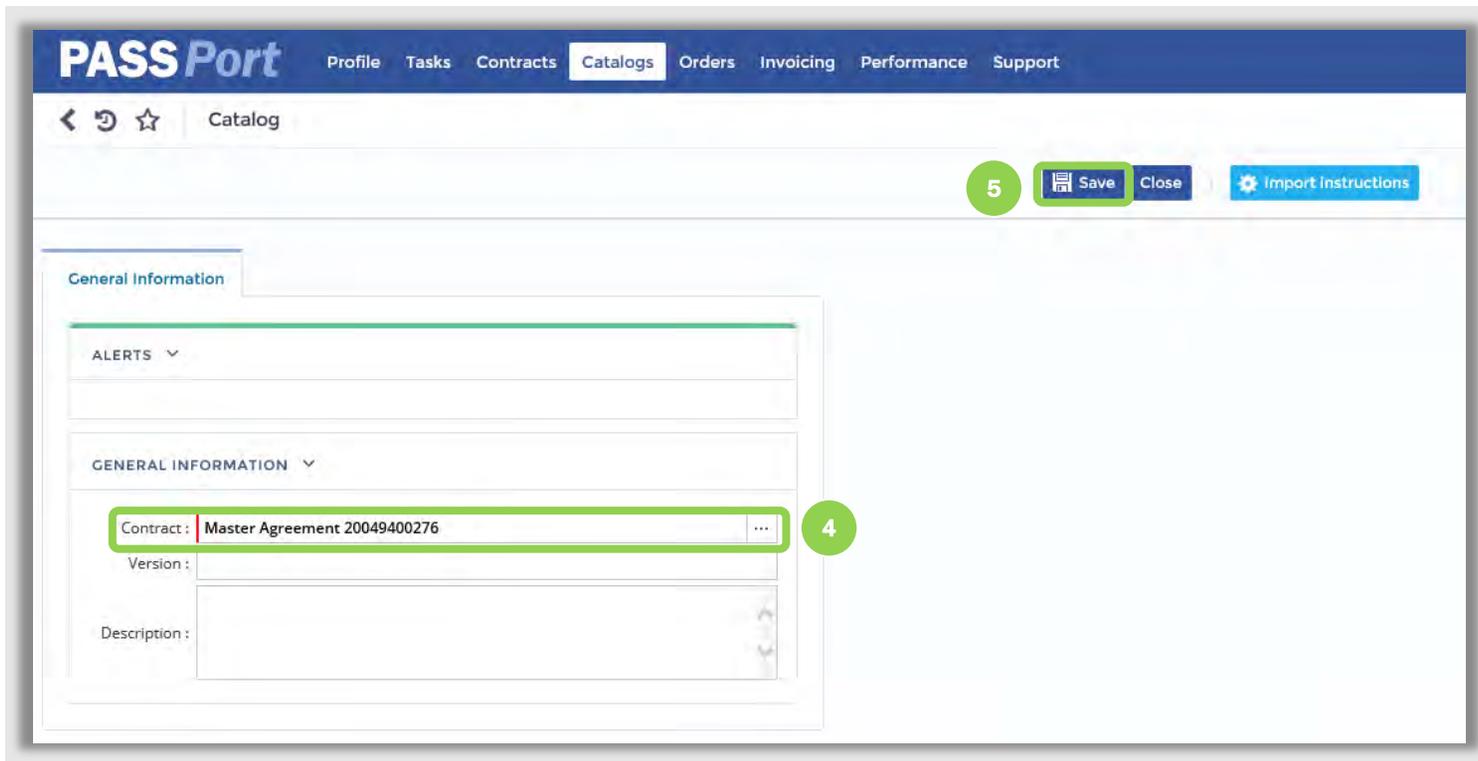
table with prices and quantities.

4. Editing Catalog Items

While Catalog items cannot be edited within PASSPort after they are imported, the details for each item can be adjusted by uploading the new information via the item template. Follow the steps below to edit any outdated or incorrect information for an item.



1. From any page in PASSPort, click the “Catalogs” header at the top of the page.
2. Select “Import Catalog” from the drop-down menu.
3. Click the “Add a New Catalog Import” button.



4. Enter a contract for the import in the “Contract” field.
5. Click the “Save” button.

PASSPort Profile Tasks Contracts **Catalogs** Orders Invoicing Performance Support

← ↻ ☆ Catalog

Save Close Import Instructions

General Information

GENERAL INFORMATION ▾

Contract : Master Agreement 20049400276
Version :
Description :

EXTRACT CURRENT CATALOG ▾

Extract existing items on Excel :
Allow to modify the existing data massively before uploading the new file.

Download Current Catalog **6**

LOAD NEW CATALOG ▾

File to import : Browse... Add File To Upload List Download Import Template

Add A Comment ▾

Comment
Drag and Drop to Add a File

Do you want to open or save Current_Catalog.xlsx from nyc-env.ivalua.us? **Open** Save Cancel

7

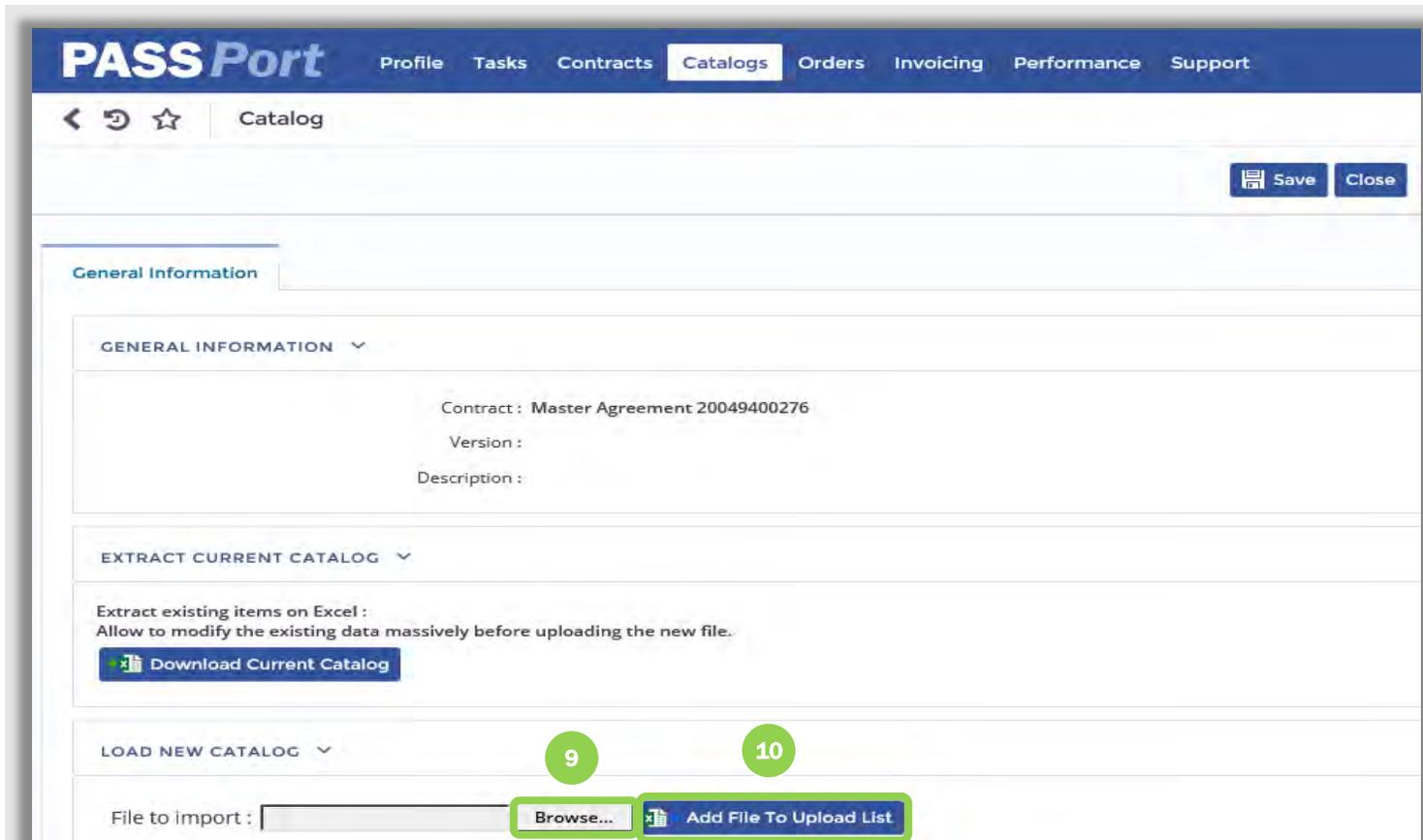
- Click the **“Download Current Catalog”** button.
- Then click **“Open”** to view the file.

8

ProductCod	ProductLabel	Commodity	Commodity	Manufacturer	Linktomanufacturercatalog	ProductVendorRe	Summary	Keywords	Description
1	1100	Desks	NDP	42203		9338DK	Steel desk, with side drawer	desk, drawer, table	Steel table is 45x24x29.5 inches (WxDxH), contains 2 drawers with metal handles on the right side and can accommodate hanging folders. Table top is
2	1113	Lockers	NDP	42653		58412L,K	72-inch tall metal wall locker	locker, storage	Grey wall lockers are 12x18x72 inches (WxDxH) and come in sets of three. Steel material and legs are 8 inches off of the ground. Available in grey, blue,
3	1245	Posture Chairs	NDP	42560		73745PC	Ergonomic chair, with wheels	chair, swivel, ergonomic	Ergonomic plastic chair comes equip with wheels, thermal comfort, and adjustable arms, lumbar support, and seat deconvolve. Available in black and grey.
4	1445	Partion	NDP	42556		87430PT	4-Panel Room Divider/Partion	partition, barrier, wall, separate, room divider	Diabed-foam panels, which is 6.5 feet tall, separates space and decreases sound. Available in black, grey, and tan.
5	1515	Filing Cabinets	NDP	42540		56505FC	4-Drawer Filing Cabinet	cabinet, file, filing, storage	Steel, vertical 4-drawer filing cabinet with 15x5x24.7 inch dimensions, accommodates letter-sized hanging folders, includes a lock on each drawer for s
6	1712	Juice	NDP	42090		12579JC	64oz Apple Juice	juice, apple, 100%	64oz apple juice containing a blend of apples, 100% natural; no added sugar
7	1715	Coffee	NDP	43014		30705CF	Keurig® 3.5oz coffee	coffee, instant, dark roast	Instant dark roast coffee, makes 50 cups, 3.5oz
8	172	Milk	NDP	43075		56705MK	1 gallon whole milk	milk, reduced-fat, whole	1 gallon of milk, available in whole, organic, fat free, lowfat
9	1726	Fresh Pizza	NDP	47154		12343PZ	Round 12-inch plain pizza	pizza, cheese, round	Flatbread 12-inch round dough topped with tomato sauce and cheese. May come with different toppings at an additional cost.
10	173	Yogurt	NDP	43090		54321YG	Chobani greek yogurt	yogurt, greek	Non-fat, greek yogurt, 5.3oz. Available in plain or different fruit flavors (strawberry, cherry, etc.)

- Edit the necessary fields in the current Catalog template and save the file to your computer.

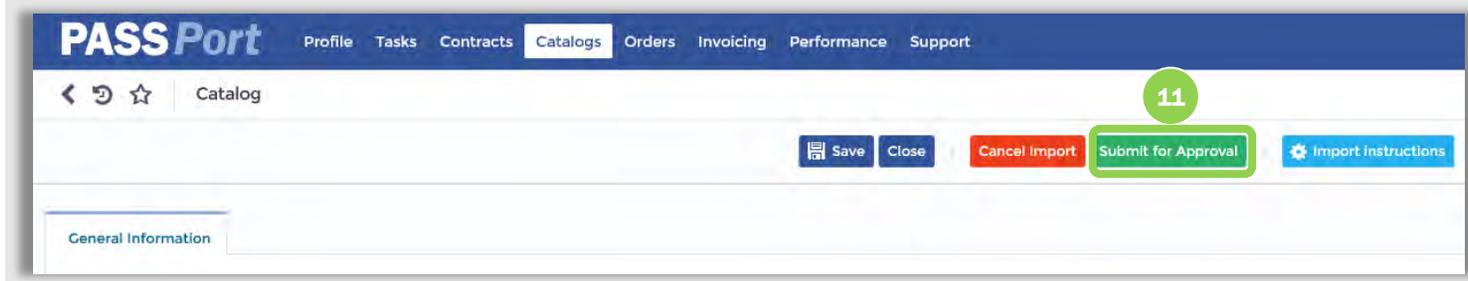
Note: Images cannot be uploaded by adding them to the template directly. If uploading a zip file with images, that image file name must match exactly what is in the template (“Image” field), in order for images to upload successfully.



9. Click “Browse” to search for and select the Catalog file you wish to upload.

10. Click the “Add File To Upload List” button.

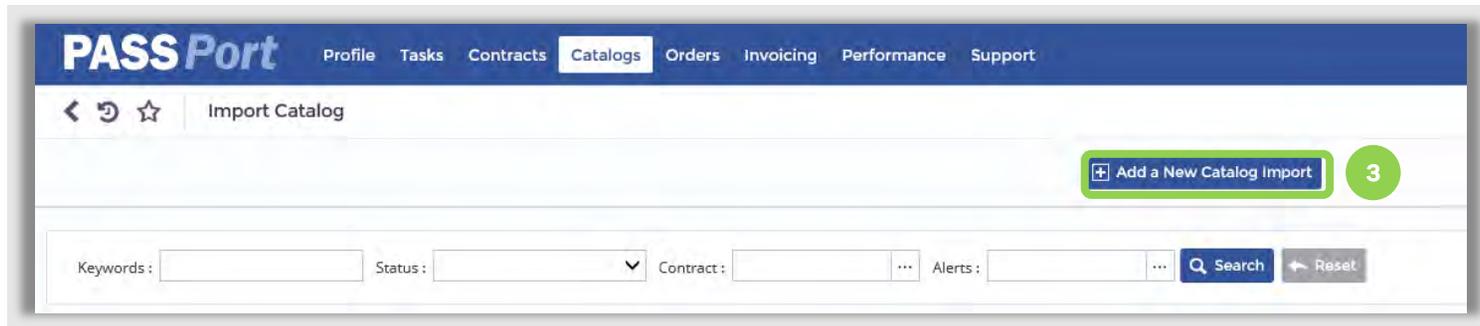
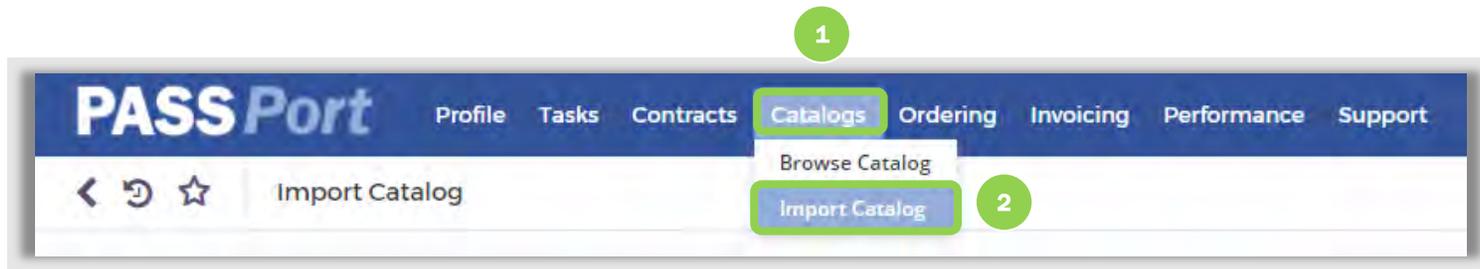
Note: If images are available, please save to a folder with the template, then zip the folder. The zipped folder can be uploaded here, if needed.



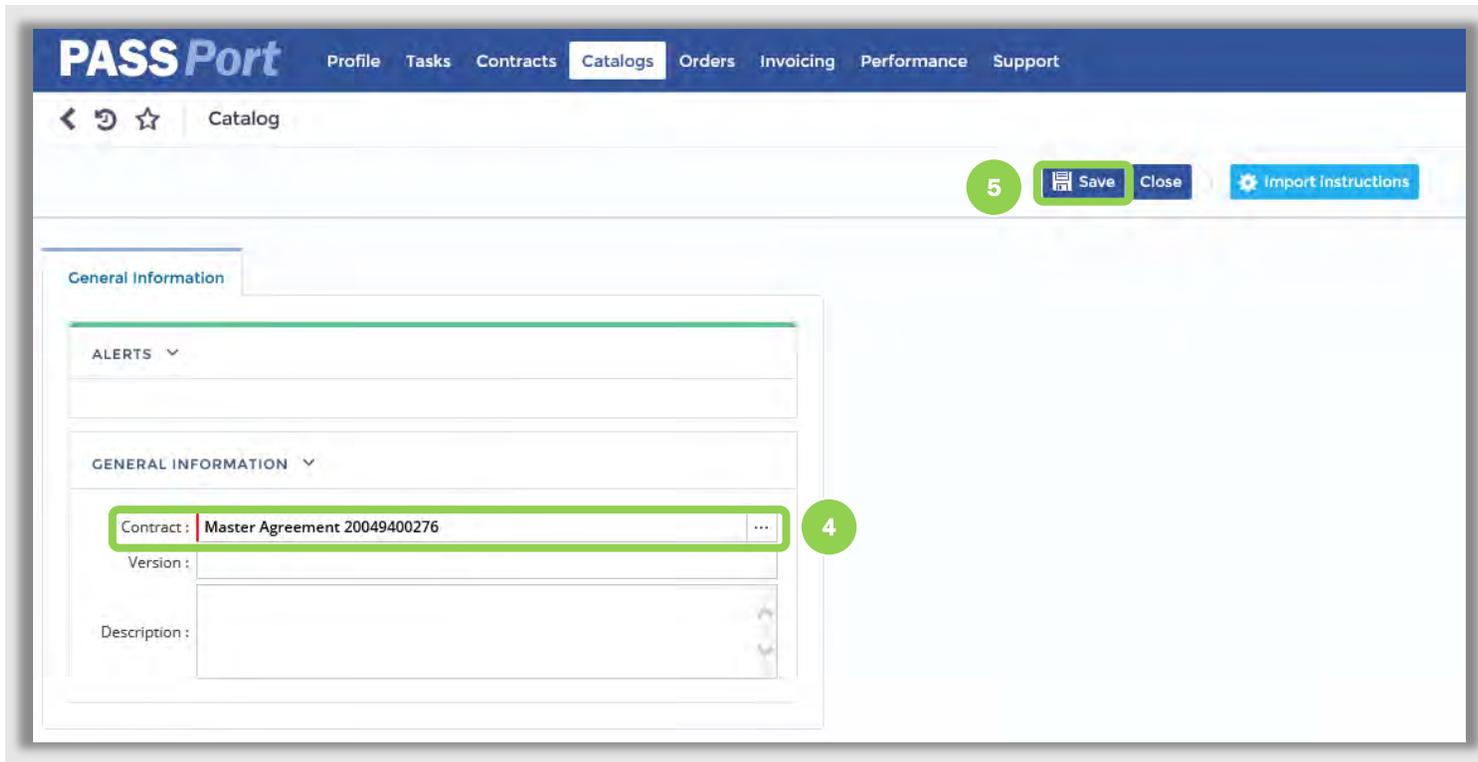
11. Click the “Submit for Approval” button.

5. Removing Catalog Items

Catalog items cannot be removed from PASSPort after they are imported. However, the validity dates for each item can be adjusted to ensure that outdated or sold out products are no longer being purchased. Follow the steps below to edit the validity period and expire an item which should no longer be purchased by your Contracting Agency.



1. From any page in PASSPort, click the **“Catalogs”** header at the top of the page.
2. Select **“Import Catalog”** from the drop-down menu.
3. Click the **“Add a New Catalog Import”** button.



4. Enter a contract for the import in the “Contract” field.
5. Click the “Save” button.

PASSPort Profile Tasks Contracts **Catalogs** Orders Invoicing Performance Support

< ↻ ☆ Catalog

Save Close Import Instructions

General Information

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Contract : Master Agreement 20049400276
Version :
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EXTRACT CURRENT CATALOG ▾

Extract existing items on Excel :
Allow to modify the existing data massively before uploading the new file.

Download Current Catalog 6

LOAD NEW CATALOG ▾

File to import : Browse... Add File To Upload List Download Import Template

Add A Comment ▾

Comment
Drag and Drop to Add a File

7

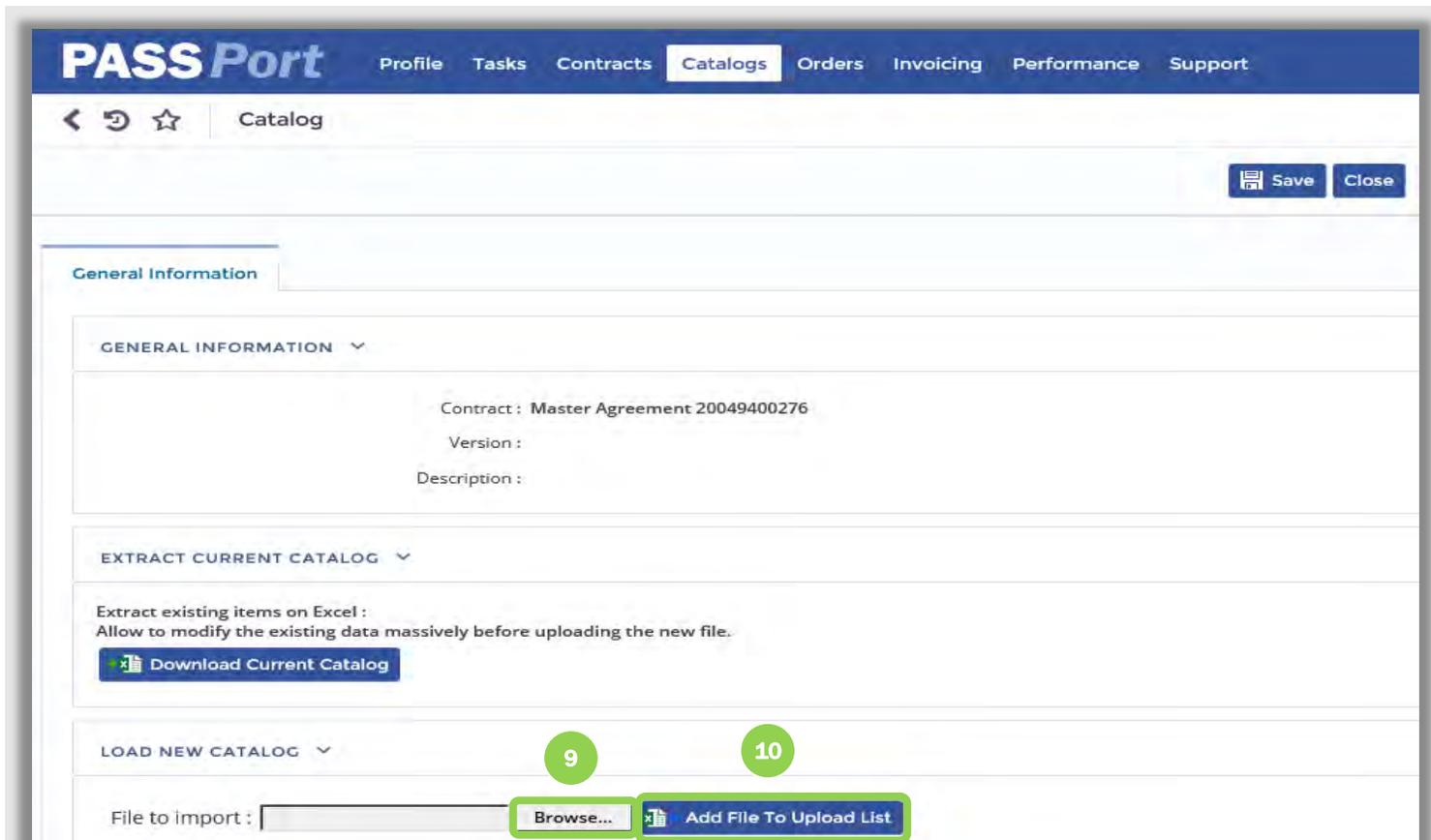
Do you want to open or save Current_Catalog.xlsx from nyc-env.ivalua.us? Open Save Cancel

6. Click the **“Download Current Catalog”** button.
7. Then click **“Open”** to view the file.

	A	B	T	U	V
1	ProductCode	ProductLabel	Account	Validatedfrom	To
2	T100	Desks		12/24/2018	12/31/2020
3	T113	Lockers		12/24/2018	12/31/2020
4	T245	Posture Chairs		12/24/2018	12/31/2020
5	T445	Partition		12/24/2018	12/31/2020
6	T515	Filing Cabinets		12/24/2018	12/31/2020
7	F12	Juice		10/24/2018	12/31/2020
8	F15	Coffee		10/24/2018	12/31/2020
9	F2	Milk		10/24/2018	12/31/2020
10	F25	Fresh Pizza		10/24/2018	12/31/2020
11	F73	Yogurt		10/24/2018	12/31/2020
12					

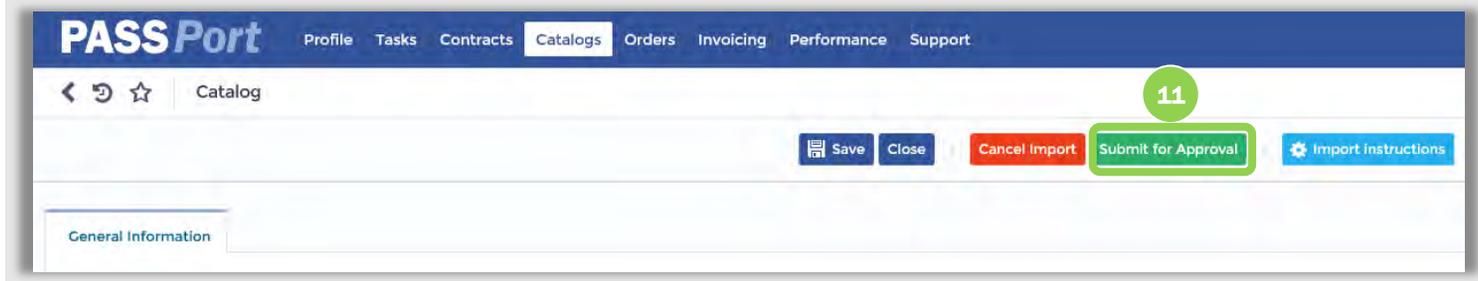
8. Edit the "Validated To" date(s) in the current Catalog template, as necessary, and save the file to your computer.

Note: These dates cannot start prior to or end after the contract's validity period.



9. Click **“Browse”** to search for and select the Catalog file you wish to upload.

10. Click the **“Add File To Upload List”** button.



11. Click the **“Submit for Approval”** button.

This user manual has provided you with step-by-step instructions on how to import and manage Catalogs in PASSPort. For more information about Catalog Management, please visit the MOCS PASSPort User Materials page or contact MOCS at help@mocs.nyc.gov.