PASSPort Overview and General Navigation for Agencies

Vendor Management

Last Updated: March 29, 2018
PASSPort OVERVIEW
Current NYC Procurement

- Takes too long to procure and receive payment
- Duplicative data entry for vendors
- Antiquated regulations do not align with current best practices and technology

- Most systems are internal (City-facing) with no public interface
- Disconnected procurement technology ecosystem
The First Deputy Mayor and the Mayor’s Office of Contract Services (MOCS) are leading an effort to transform and improve the way goods and services are procured.

As an important part of the overall effort, the Department of Information Technology & Telecommunications (DoITT) and Department of Citywide Administrative Services (DCAS), in partnership with the City, will implement a new end-to-end procurement solution called PASSPort, the Procurement and Sourcing Solutions Portal.
PASSPort Objectives

Process Reform
Streamlining the procurement process

New Technology
• VENDEX is being replaced with an online portal
• PASSPort will integrate many vendor management activities into one user-friendly portal
• A shared online platform for vendors and City Agencies

Technology
Shared online portal for all vendor information

Financial Impact
• Configurable software leading to a reduced total cost of ownership
• Streamlining review processes to reduce registration times

Transparency
• Relevant vendor information is securely shared across City Agencies
• Enhancing reporting capabilities benefiting City Agencies and vendors

Collaboration
A stronger procurement partnership between Agencies, vendors and the City

Process Improvement
• Eliminating the paper-based VENDEX package submission process
• Vendors create, own and manage updates of their account information online
• Easier vendor task management
PASSPort consists of three modules that standardize the approach for:

**Vendor Management**
- Replaced VENDEX
  - Vendor Account Creation
  - Integration with NYC.ID
  - Commodity Enrollment
  - Performance Evaluations
  - Responsibility Determinations

**Requisition to Pay**
- Catalog Management
- Purchase Order Issuance
- Requisitions and Ordering

**Source to Contract**
- Replaces APT
  - Pre-Solicitation Review
  - Solicitation Management
  - Contracting Authoring and Execution
  - Request for Action (RFA) development

**Timeline**
- **Release 1** Summer 2017
- **Release 2** Early 2019
- **Release 3** Upcoming
PASSPort Goals

PASSPort, the Procurement and Sourcing Solutions Portal, is a vendor-facing end-to-end procurement system.

Its key goals include:

- Paperless, single sign-on portal
- User-friendly and transparent platform
- Quick and efficient sharing of data across Agencies and vendors
- Increased capability to generate reports
GENERAL NAVIGATION IN PASSPort
General Navigation in **PASSPort**

In this section, the following PASSPort navigation tools will be discussed:

1. Homepage Navigation
2. Drop-down Menus
3. Navigational Icons
4. Universal Search
5. Page Elements and Tool Tips
General Navigation — Homepage Navigation

Main Menu Navigation Bar: Clicking on any of these options will display its associated drop-down menu.

Home Logo: Clicking the logo on any screen will return you to the homepage.
General Navigation — Main Menu Drop-downs

By clicking on any of the options in the Main Menu Navigation, a drop-down menu will display. For example, this is the Vendors drop-down menu.

Select an option to navigate to the desired page.
General Navigation — Homepage Navigation

**Page Name:** Every page in PASSPort will have a unique page name that will help identify where you are in the system.

**Role-Based Windows:** These are specific to the page the user is on and his or her role. From each window you can quickly take action on particular tasks.
Across from the PASSPort logo, on the upper right-hand side of the screen, your name is displayed. Clicking on your name displays the User Options drop-down menu.

### Menu Option Description

<table>
<thead>
<tr>
<th>Menu Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>My account</td>
<td>View your account profile where you can update your personal information and business address.</td>
</tr>
<tr>
<td>My Workflow tasks</td>
<td>Displays all the workflow tasks that are in your queue and require your action.</td>
</tr>
<tr>
<td>My addresses</td>
<td>Displays all the office and shipping addresses associated with your account.</td>
</tr>
<tr>
<td>Logout</td>
<td>Logs you out of PASSPort.</td>
</tr>
</tbody>
</table>
# General Navigation — Navigational Icons

<table>
<thead>
<tr>
<th>Navigational Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>⬅️</td>
<td>Back Arrow: Returns you to the previous page.</td>
</tr>
<tr>
<td>⏸️</td>
<td>History: Allows you to view your previously viewed pages.</td>
</tr>
<tr>
<td>★</td>
<td>Favorites: Enables you to create “shortcut” links to frequently visited items.</td>
</tr>
</tbody>
</table>
General Navigation — Universal Search

- Enter a keyword in the Universal Search field to initiate a search across all modules in the system.
- Search results are organized by type (Vendor, Contracts, Page, etc.).
- Click on the associated hyperlink to access the search result.
- Universal searches can be performed on any page in PASSPort.
General Navigation — Page Elements

**Action Buttons:** These are used to create transactions, save records, and complete other system actions. These are color-coded by type:
1. **Red:** Cancel or reject a task
2. **Green:** Approve or move forward with a task
3. **Blue:** Save or copy a task

**Functional Tabs:** Each record is organized by functional tabs, which helps you access additional information.

**Form Fields:** These fields are used to enter information into a particular form.
Tool Tips: For a given field, the tool tip option provides quick help information that is relevant to that specific field. The tool tip can be accessed by hovering over the Information icon.
Workflow Tab: By navigating to the Workflow tab of any record in PASSPort, you can see where it is in its process workflow as well as any comments and/or attachments other users have added. Comments and attachments on this tab are only viewable by City users.