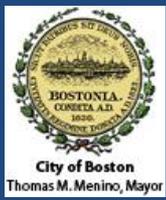


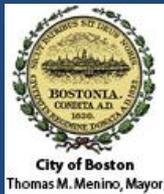
Vendor Orientation

City of Boston - BAIS Financials 9.1
July 2012



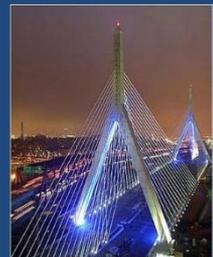
Welcome Vendors !

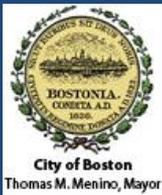




Introduction

- The City of Boston is introducing new functionality to its prospective and existing vendors that includes some exciting new ways of doing business with the City.
- These changes will make doing business with the City of Boston easier and more efficient than ever before!
 - On-Line Bidding
 - Online Contracts using e-Signatures
 - Elect to Receive Purchase Orders by E-mail
 - Setup ACH payments



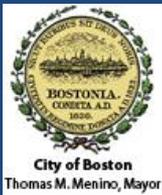


What's in it for me?

Maintain your own profile!

– A registered vendor will now be able to add or change:

- Contact Names
- Addresses
- Phone Numbers
- Email Addresses
- ACH information
- Industry Self-Categorization



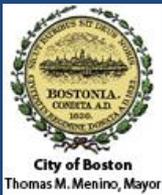
What's in it for me?

Improved access to bid notifications!

- As part of the registration process, suppliers can select 'Categories' of goods and/or services your company provides.
- Categorizing your company indicates to the City of Boston those bid events in which you might specifically be interested.
- A supplier who has self-categorized can spend less time monitoring the public bid event postings.

View bid response history!

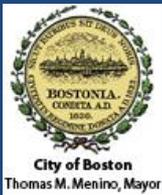
- Suppliers who use the Supplier Portal will have a historical view of all their bid responses submitted online.



What's in it for me?

Electronic signature capability on contracts:

- Securely sign documents online using Adobe Reader.
- Access to documents requiring your electronic signature is limited to those within your organization who are given login credentials and registered as a Contract Signer.
- All signed documents are archived within the Supplier Portal
- Electronic documents provide a significant reduction in the environmental impact of paper processes



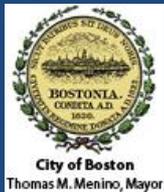
New Features and Benefits

Feature: **On-Line Bidding**

Supplier Benefits

- Saves Time
- Your bid information is secure
- Confidence that your bid submission is complete
- Flexibility to save a bid that is in-progress
- City Hall is now as close as the nearest computer!



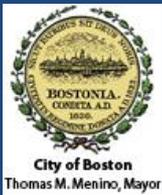


New Features and Benefits

Feature: “Direct Connect” opportunities

Vendor Benefits

- Indicate to the City of Boston that your company wishes to participate in e-commerce punch-out
- Allow City of Boston Buyers direct access to order selected items from your website

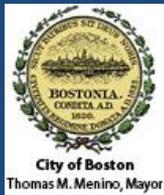


New Features and Benefits

Feature: **Electronic Contract Documents**

Vendor Benefits

- View contract documents and contract attachments online
- Quickly finalize contract through the use of electronic signature and routing back to the City of Boston
- Securely share documents with authorized parties



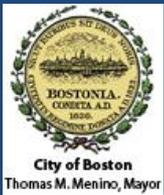
New Features and Benefits

Feature: **Receive PO's by E-mail**

Vendor Benefits

- Saves time
- Electronic Record of your orders
- Less paper means a 'greener' solution for all





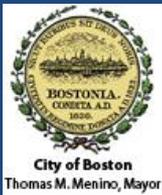
New Features and Benefits

Feature: **ACH Payments**

Vendor Benefits

- Get your money faster through electronic payment
- Eliminate paper checks and misplaced payments
- Receive Payment Advice by E-mail





Bidder/Vendor Experience

Supplier Portal Visitors (Public):

View the City's publicly advertised events

Register to create a profile, username, pwd

Registered Supplier Portal users can:

View the City's publicly advertised events

View events you were invited to

Submit a bid response

Review your bid history

Self-categorize your company

Maintain company contacts & addresses

Apply electronic signature to contracts

A basic lifecycle for a Bidder/Vendor

1. Register as a user
2. Categorize your company
3. Review open events
4. Receive event invitations
5. Submit a bid response
6. Be awarded
7. Sign a contract (\$25K+)
8. Receive Purchase Order



What will it look like?

City of Boston Supplier Portal

Home | Worklist | Report A Problem | Add to Favorites

Personalize [Content](#) | [Layout](#)

Login

Login as an Existing User

User ID:

Password:

[? Forgot User Id](#)
Click here to email your User Id

[? I forgot my password](#)
Click here to reset your password

Supplier Portal Registration

[Register as a Sourcing Bidder](#)

City of Boston's Bidders are suppliers which have access to view the City's Invitations for Bid, Requests for Proposal, and other procurement events. You must be registered in order to place a bid. In addition, registered suppliers can select categories of procurement which they want to be notified of. When a bid event is posted to the City of Boston Supplier Portal, Bidders who have selected that potential contract's relevant category of business may be notified of the event via email. Please use this registration process if you are looking to become a City of Boston supplier and need access to bidding functionality.

[Vendor Registration Form](#)

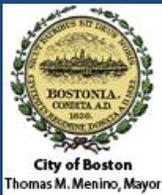
City of Boston's Vendors have an existing agreement (contract, awarded bid, etc) between their company and the City. Vendors have all of the same access to place bid offers on future on future events that Bidders do. They also are able to maintain company information on their Vendor profile and see details of their contractual agreements with City of Boston. Please use this registration process if you are already an active City of Boston vendor looking to register as a supplier portal user.

My Sell Events

Event Name	Event Type	Start Date/Time	End Date/Time:
Test copy event 161	RFx	06/30/2012 1:06PM EDT	07/15/2012 01:05 PM EDT
Test with long description	RFx	06/30/2012 1:02PM EDT	07/15/2012 01:01 PM EDT
LMC test	RFx	06/30/2012 10:43AM EDT	07/15/2012 10:42 AM EDT
Test XML Bid Upload	RFx	06/30/2012 9:36AM EDT	07/15/2012 09:35 AM EDT
EKW Event PDF Test 6/30/2012	RFx	06/30/2012 9:30AM EDT	07/15/2012 09:27 AM EDT

[See all of my events](#)

- Navigate to the City of Boston Procurement Page – <https://www.cityofboston.gov/Procurement>
- From the Procurement Page, click on the ACCESS SUPPLIER PORTAL link



View Events and Place Bids

ORACLE

Home | Sign out

Favorites Main Menu

Search Menu:

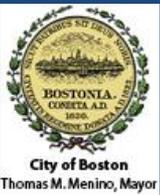


Manage Events and Place Bids

View Terms & Conditions

Help

- From the Main Menu, select Manage Events and Place Bids.



View Events and Place Bids

ORACLE® Home | Sign out

Favorites Main Menu

Search Menu: >>

- Manage Events and Place
- View Terms & Conditions
- View Events and Place Bids**
- Bidding Homepage
- My Event Activity
- Maintain My User Contact
- My Bidder Profile
- My Categorizations
- My IM Settings
- Maintain IM Info - Hidden
- Discussion Forums

? Help

- Next, click the View Events and Place Bids link.



View Events and Place Bids

City of Boston

Home | Sign out

Favorites | Main Menu > Manage Events and Place Bids > View Events and Place Bids

New Window | Help | Customize Page | http

View Events and Place Bids

Welcome, Deloitte Consulting LLP
User: Tim Deloitte

Enter search criteria to locate an event for viewing or placing bids.

Search Criteria

Use Saved Search:

Event ID: -

Event Name:

Event Type:

Event Status:

Include Declined Invitations?

[Manage Saved Searches](#) [Save Search Criteria](#)

Search Results

Event ID	Event Name
BOSTN-0000000009	Draft RFP Case
BOSTN-0000000004	Basketballs for BPS Athletics
BOSTN-0000000017	Invite Deloitte Only
BOSTN-0000000019	Event Trace

Sell | RFx | 12/29/2011 02:59 PM EST | [Discuss](#)

- You can search for Events using one or more different Search Criteria
- Search Criteria can be saved once to use on future searches

- The Search Results area lists the events that match the criteria entered.
- To access the Event Details of a listed event, simply click on the Event ID hyperlink.
- Click the Discuss link to view important messages posted by the City of Boston Event Coordinator.



Event Details

City of Boston

Home | Sign out

Favorites Main Menu > Manage Events and Place Bids > View Events and Place Bids

New Window Help Customize Page http

Welcome, Deloitte Consulting LLP
User: Tim Deloitte

Event Details

[Information On Inquiry Options](#)

Accept Invitation
Decline Invitation
Bid on Event

Bidding Shortcuts:

- [View Event Activity](#)
- [View Event Package](#)
- [Upload XML Bid Response](#)

Event Name:	Draft Actuarial Services Request
Event ID:	BOSTN-0000000022
Event Format/Type:	Sell Event RFX
Event Round:	1
Event Version:	1
Event Start Date:	12/15/2011 10:32AM EST
Event End Date:	12/30/2011 09:20 AM EST

Event Description:

The City of Boston (the City), acting by and through its City Auditor (the Official), hereby requests sealed proposals from interested and qualified parties (Offerors) to provide actuarial and consulting services for the calculation of actuarial liabilities, and associated normal costs for injured workers costs, which consists of workers compensation benefits and claims, police & fire injury pay and indemnifications, as defined by Governmental Accounting Standards Board (GASB) in Statements No.10 and any related technical bulletins and pronouncements.

Contact: Erik DeMarco

Payment Terms:

Phone:

My Bids: 0

- The Event Details page allows you to view details of the event such as: Event Name, Start and End dates, Contact Information, and Event Description.
- Click the Bid on Event button to submit a bid response online!



Bid Questions

City of Boston

Favorites Main Menu > Manage Events and Place Bids > View Events and Place Bids

★ Please provide a brief description of the nature of the Offeror's company's business.
Response:

★ Describe the Offeror's company's role in executing the scope of work identified in the RFP. Describe subcontractor in executing the scope of the work.
Response:

For the Offeror and all subcontractors, please provide the Number and Nature of the professional engagement full time.
Response:

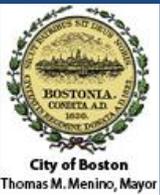
- On the Event Details page, you will be prompted to answer any questions that the bid event requires.
- You can also add attachments as necessary to complete your bid response.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid response. Some or all lines may require your bid in order for consideration by the Event Administrator.

Lines in This Event: 1

Lines Responded To: 0



Enter Your Price

City of Boston

Home | Sign out

Favorites Main Menu > Manage Events and Place Bids > View Events and Place Bids

DOCUMENT.

Step 2: Enter Line Bid Responses

This event contains one or more individual lines that await your bid Event Administrator.

Lines in This Event: 1

Lines That Require a Response: 1

Lines Responded To: 0

Your Total Line Pricing: 0.0000 USD

[Hide Line Detail](#)

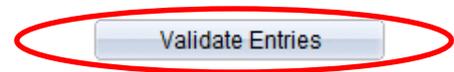
★ Bid Required Line Comments/Files

Line	Description	Unit	Your Unit Bid Price	Your Total Bid Price	
1	★ Actuarial and Consulting Services: Injured Workers Costs	STD	<input type="text"/>		Bid 

At any point in the bid response process you may save an in-progress bid and resume completion at later time. When your bid response is complete, submit for consideration.

[Return to Event Search](#)

- The Event Details page provides a space for the bidder to enter a Unit Bid Price.
- The Total Bid Price for all Line Items is automatically calculated.
- Add comments and attachments by clicking on the conversation bubble icon at the end of the Line Item.
- Use the Validate Entries button to ensure that all required questions have been answered.





Validate Your Entries and Submit Your Bid

City of Boston

Home | Report A Problem | Sign out

Favorites | Main Menu > Manage Events and Place Bids > View Events and Place Bids

New Window | Help | Customize Page | http

Welcome, Boiler Up
User: Purdue Pete

Event Details

! Response required. You must enter a response for General Question 1 - The City of Boston is subject to ...

Event Name:	Draft Actuarial Services Request	
Event ID:	BOSTN-0000000022	
Event Format/Type:	Sell Event	RFX
Event Round:	1	
Event Version:	1	
Event Start Date:	12/15/2011 10:32AM EST	
Event End Date:	12/30/2011 09:20 AM EST	

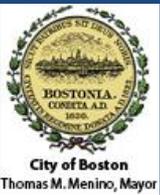
[View/Add General Comments and Attachments](#)

[Hide Additional Event Info](#)

Description:

The City of Boston (the City), acting by and through its City Auditor (the Official), hereby requests sealed proposals from interested and qualified parties (Offerors) to provide actuarial and consulting services for the calculation of actuarial liabilities, and associated normal costs for injured workers costs, which consists of workers compensation benefits and claims, police & fire injury pay and indemnifications, as defined by Governmental Accounting Standards Board (GASB) in Statements No.10 and any related technical bulletins and pronouncements. The RFP contains both price and technical evaluation criteria. Price and technical proposal information shall be kept separate in either online response or hard copy shipments. A nonrefundable proposal deposit for twenty dollars (\$20) in the form of a check payable to the City of Boston must accompany the technical proposal if sent in via an envelope packet.

- You will receive a message if you have omitted an answer to any required question.
- Once all of the required information is populated, the bid is submitted to the City of Boston with a click of the Submit Bid button!



Bid Confirmation

City of Boston

Home | Sign out

Favorites | Main Menu > Manage Events and Place Bids > View Events and Place Bids

New Window Help Customize Page http

Bid Confirmation

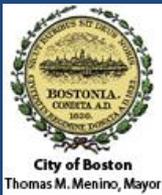
Your bid has been successfully submitted.

Bid ID:	1	Bid Date:	12/19/2011 6:15:41PM EST		
Event ID:	0000000022	Draft Actuarial Services Request			
Event Format:	Sell Event	Round:	1	Version:	1
Start Date:	12/15/2011 7:32AM PST	End Date:	12/30/2011 09:20 AM		

Your Total Price: 1,500,000.00 USD

OK

- The Bid Confirmation page shows the bid details and confirms that the bid was successfully submitted.
- The bidder will also receive a confirmation email that includes a copy of the bid package with the bidder's submitted responses!



How Can I Get More Information?

- **Register** your organization to use the Supplier Portal at:
 - <https://www.cityofboston.gov/Procurement>
- **Visit** the Procurement website often for more information, recorded tutorials on the new features, and future updates from the City of Boston.
- **Stop By** the Vendor Help Desk located in City of Boston Purchasing Department for help with using the new system.
 - One City Hall Square, Boston MA 02201 Room 808
- **Still have questions?** E-mail us at Vendor.Questions@cityofboston.gov

