



# Helping Your Business: Navigating Online Purchasing Resources

Mr. Byron E. Johnson, C.P.M., Purchasing Officer

Mr. Justin Jousan, Senior Business Systems Analyst

November 7, 2012

# Introduction

- The City of Austin is committed to spending in the M/WBE community – Here’s the top ten departments in FY 11 (complete) and FY12 (year to date):

Department	FY 11 (Final) Amounts			FY 12 (3d Quarter Year To Date) Amounts		
	WBE	MBE	Total (1)	WBE	MBE	Total
Austin Water	\$ 9,499,870.00	\$ 25,863,166.00	\$ 35,363,036.00	\$ 6,289,836.00	\$ 13,212,158.00	\$ 19,501,994.00
Public Works	\$ 2,177,837.00	\$ 9,087,295.00	\$ 11,265,132.00	\$ 331,120.00	\$ 8,047,492.00	\$ 8,378,612.00
Contract Management (2)	\$ 2,455,483.00	\$ 7,786,510.00	\$ 10,241,993.00	\$ 1,189,059.00	\$ 3,761,430.00	\$ 4,950,489.00
Austin Energy	\$ 1,723,545.00	\$ 6,199,793.00	\$ 7,923,338.00	\$ 1,052,327.00	\$ 4,011,857.00	\$ 5,064,184.00
Watershed Protection	\$ 807,524.00	\$ 2,932,447.00	\$ 3,739,971.00	\$ 999,873.00	\$ 2,580,392.00	\$ 3,580,265.00
Aviation	\$ 1,387,202.00	\$ 1,183,750.00	\$ 2,570,952.00	\$ 1,152,666.00	\$ 756,491.00	\$ 1,909,157.00
Parks and Recreation	\$ 635,079.00	\$ 1,727,596.00	\$ 2,362,675.00	\$ 115,146.00	\$ 403,529.00	\$ 518,675.00
Finance and Administrative Services	\$ 753,713.00	\$ 1,161,450.00	\$ 1,915,163.00	\$ 183,302.00	\$ 589,047.00	\$ 772,349.00
Austin Convention Center	\$ 289,889.00	\$ 924,817.00	\$ 1,214,706.00	\$ 46,350.00	\$ 264,397.00	\$ 310,747.00
Austin Resource Recovery	\$ 302,209.00	\$ 451,751.00	\$ 753,960.00	\$ 43,688.00	\$ 402,087.00	\$ 445,775.00

NOTES:

- Sorted by Total FY11 (Final) Amount Descending
- Contract Management Department acquires construction and related professional services acts on behalf of all City departments.

Source: City of Austin FY11 and FY12 YTD "Analysis of Total Payments by Department - Side-by-Side"

# Purchasing Organization

- Byron E. Johnson, C.P.M., Purchasing Officer
- Ms. Denise Lucas, C.P.M., Deputy Purchasing Officer
  - Contract Services
  - IT Acquisition
- Ms. Yolanda Miller, C.P.M., C.P.P.O., Deputy Purchasing Officer
  - Procurement
- Mr. Michael Benson, Chief Administrative Officer
  - Vendor Services
  - Procurement Card Services
  - Business Systems Analysis and Financial System Support
- Ms. Rosie Truelove, Director, Contract Management Department

# The “Process”

- Register
  - Online in Vendor Connection
- Be notified of solicitation opportunities
  - By email provided during registration
  - Advertisement in Austin American-Statesman
  - Note: firms offering to collect bid opportunities for you typically don't have full access to City bid information
- Respond to solicitations
  - Attend our pre-bid and pre-proposal conferences
  - Send us your bid!
- As the low bid or best value proposer, be awarded contracts!

# How do we help you?

- In October, 2011, the City made a single financial portal available to the public.
- This portal is Austin Finance Online, and it contains
  - Vendor Connection, where you can:
    - Register your business
    - Update account information, such as email address
    - Manage solicitation notifications
    - View your firm’s commercial relationship with the City, including prime- and sub-contracting information – exclusive to your information
  - Contract Catalog
  - eCheckbook
- AFO won the Award for Excellence from the **Government Finance Officers Association** for 2012, and received an Honorable Mention award from **Government Computer News**
- AFO contains an unbelievable amount of “market intelligence”

# How do I get to AFO?

- It can be accessed from the City's main Internet page:
- <http://www.austintexas.gov>
- Scroll to the bottom of the page, and...
- Click Austin Finance Online!

# Austin Finance Online

The screenshot shows the Austin Finance Online website. At the top left is the 'austintexas.gov' logo. The main header reads 'Austin Finance Online' with the subtitle 'City of Austin - Financial Services'. Below this is a banner image of the Austin skyline and a bridge over a river. A navigation menu contains the following items: HOME, FINANCIAL DOCUMENTS, CONTRACT CATALOG, eCHECKBOOK, UNCLAIMED PROPERTY, OFFICES, VENDOR CONNECTION, and FAQ. The main content area features six icons: Financial Documents (stack of papers with a dollar sign), Contract Catalog (magnifying glass over a document), eCHECKBOOK (laptop with a dollar sign), Unclaimed Property (safe with a dollar sign), Offices (globe), and Vendor Connection (person icon). To the right, there are three sections: 'Contract Catalog' with a sub-header and a description; 'What is New' with a list of recent updates; and 'User Guide' with a link to the user guide.

**austintexas.gov**

**Austin Finance Online**  
City of Austin - Financial Services

HOME FINANCIAL DOCUMENTS CONTRACT CATALOG eCHECKBOOK UNCLAIMED PROPERTY OFFICES VENDOR CONNECTION FAQ

**FINANCIAL DOCUMENTS**

**CONTRACT CATALOG**

**eCHECKBOOK**

**UNCLAIMED PROPERTY**

**OFFICES**

**VENDOR CONNECTION**

**Contract Catalog**  
A listing of current contract activity with the City of Austin.

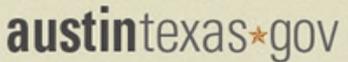
**What is New**

- AFO Wins National Award for Financial Transparency!
- Comprehensive Annual Financial Report 2011
- 2013 Proposed Budget
- Local Presence
- No Contact List
- Payment Register
- Citizen Surveys
- Council's Budget Questions

**User Guide**

- Austin Finance Online User Guide

# AFO – Vendor Connection



## Austin Finance Online

City of Austin - Financial Services

HOME FINANCIAL DOCUMENTS CONTRACT CATALOG eCHECKBOOK UNCLAIMED PROPERTY OFFICES **VENDOR CONNECTION** FAQ

MAIN CREATE ACCOUNT OPEN SOLICITATIONS CLOSED SOLICITATIONS

### Welcome to Vendor Connection!

Vendor Connection provides a public clearinghouse to view detailed information about current business opportunities with the City of Austin. This site allows vendors to create Subscriber accounts to subscribe to solicitations and download solicitation documents. Vendors may also register to be notified of any new business opportunities based on commodity codes that they select.

**START HERE**

#### New Vendors

Anyone may create an account to subscribe to solicitations. Companies may also register to be notified about future business opportunities with the City based on commodity codes that they select. Registering requires providing additional information such as Legal Name and Tax ID.

**CREATE ACCOUNT**

#### Existing Vendors

Vendors that already have accounts with Vendor Self Service (VSS) are converted to Vendor Connection. However, they still need to activate their account by resetting the **password**. Not sure if you already have a registered account, **search here**.

**ACTIVATE ACCOUNT**

#### Account Login

Username

Password

**Login**

Create Account  
Retrieve Username  
Reset Password

#### Contact Information

Central Purchasing  
Contract Management

Watch the video tour of what you will find in **Vendor Connection**

NEWS PURCHASING SERVICES STANDARD BID DOCUMENTS BID OPENING WEBINAR

# How can Vendor Connection help my business?

- Solicitations
- Account Maintenance
  - Registration
  - Certification
- Manage commodity codes
  - Basis for notification of solicitations
- Manage solicitation updates
- Reports about the commercial relationship between your business and the City:
  - Contracts as prime- and sub-contractor
  - Payments as prime- and sub-contractor

# Vendor Connection Login

**Account Login**  
Username   
Password   
  
  
[Create Account](#)  
[Retrieve Username](#)  
[Reset Password](#)

NOTE: Test Vendor Displayed

**Vendor** **RCA89INC - RAY1093500**

As a **Registered Vendor**, you may subscribe to solicitations(FAQ link), download solicitation attachments(FAQ link), and add/update commodities for notification(FAQ link). You are also eligible to be awarded a contract.

HOME

**My Subscribed Solicitations**

Solicitation Number / Description	Due Date	Action
<b>IFB 7400 TESTVENCONN_STHUR</b> Inventory, Shirt Uniform Apd Tactical L/S 65/35 Poly/Cotton	08/18/2011	unsubscribe 

**Account**  
[Home](#)  
[Contact/Password](#)  
[Business](#)  
[Addresses](#)  
[Commodities](#)  
[Summary](#)  
[Additional Accounts](#)

**Reports**

# Solicitations

- View solicitations that you have subscribed to, and for a short time period, solicitations that you visited or viewed without subscribing to.

As a **Registered Vendor**, you may subscribe to solicitations(FAQ link), download solicitation attachments(FAQ link), and add/update commodities for notification(FAQ link). You are also eligible to be awarded a contract.

HOME

## My Subscribed Solicitations

Solicitation Number / Description	Due Date	Action
<b>IFB 7400 TESTVENCONN_STHUR</b> Inventory, Shirt Uniform Apd Tactical L/S 65/35 Poly/Cotton	08/18/2011	unsubscribe 
<b>IFB 8200 SAP0151</b> Hydraulic Lift Cylinder Replacement For Loading Dock	07/29/2011	unsubscribe 
<b>RFQ 5600 TESTTHURSDAY3</b> 837080 Annual Maintenance Datacard Sp75 N10395 - T Penington <b>FOR SBE CERTIFIED VENDORS ONLY</b>	08/08/2011	unsubscribe 

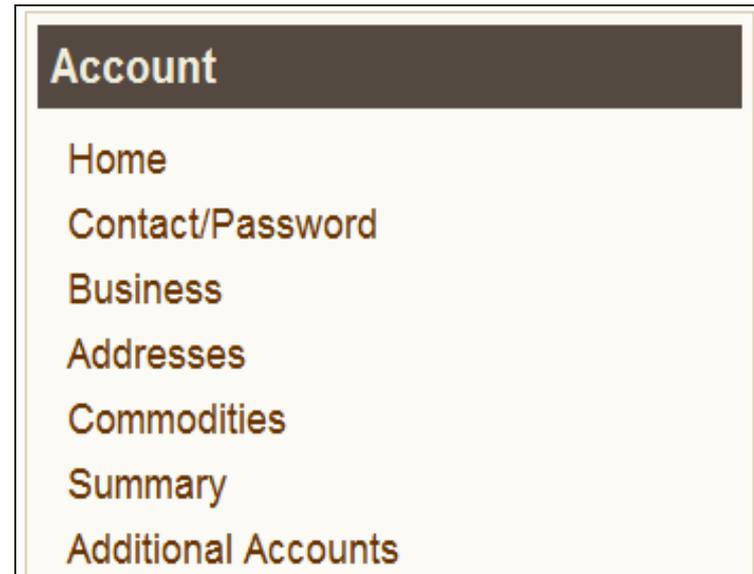
## Visited Solicitations

Solicitation Number / Description	Category	Due Date
-----------------------------------	----------	----------

# Account Maintenance

- Once you are signed in to your account, you can easily access elements of information and provide updates.

- Account Home
- Contact and Password
- Business Information
- Addresses
- Commodities
- Account Summary
- Additional Accounts



# Reports

- Once you are signed in to your account, you may view a number of reports that provide information about your firm's commercial relationship with the City.
- Payments
- Awards (individual orders regardless of type)
- Master Agreements (our long term contracts)
- Sub-Contractor Payments
- Compliance Plans

Reports
Payments
Awards
Master Agreements
Sub-Contractor Payments
Compliance Plans

# Payments

- Payments made directly to your firm by the City:

**PAYMENTS**

**Payment Information**

[Back](#)

Show **10** entries Search:

Number	Date	Status	Amount
000000003306342	11/16/2010	Disbursed	\$5,416.59

**PAYMENT DETAIL**

**Check Number: 000000003306342 Date: 11/16/2010**

[Back](#)

Show **10** entries Search:

Order Number	Payment Description	Invoice	Invoice Date	Payment Amount
DO 6100 09051221021	Engineering Consulting	893-09	08/27/2010	\$3,403.19
DO 6100 09051221021	Engineering Consulting	894-10	08/27/2010	\$2,013.40

Showing 1 to 2 of 2 entries [First](#) [Previous](#) **1** [Next](#) [Last](#)

# Awards (Orders)

- View the City's awards (individual orders) to your firm:

AWARDS

Award Information

← Back

Show 10 entries
Search:

Document ID	Rec Date	Clsd Date	Agreement ID	Actual Amt	Closed Amt	Outstanding Amt
DO 6100 10102002109A	10/26/2010		MA 6100 PA080000059	\$8,635.20	\$0.00	\$8,635.20
DO 6100 10102002046						2,800.00
DO 6100 10101101091						2,930.03
DO 6100 10081328492						9,180.00

AWARD DETAIL

Award Details

← Back

**Commodity Line 1**

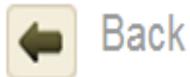
Document ID	DO 6100 10102002109A
Vend Line	1
Commodity	92517 - Civil Engineering
Commidity Description	Civil Engineering
Accounting Line	1
Description	Lower Harris Branch WW Imprv. - Seg. A
Line Amount	\$8,635.20

# Master Agreements

- View any Master Agreements between your firm and the City:

MASTER AGREEMENTS

## Payment Information



Show 10 entries

Search:

Document ID/Description	Begin Date	End Date	Order Total	Purchase Limit
<b>MA 6100 PA110000004</b> Water And Wastewater Pipeline Engineering Rotation List	11/18/2010	11/18/2012	\$0.00	\$7,500,000.00
<b>MA 7400 S040084</b> Water And Wastewater Engineering Services	11/13/2010	11/13/2011	\$2,175,806.32	\$2,239,791.93

# Sub-contractor Payments

- You can view the information reported to us by the prime contractors about your payments as a subcontractor – for each project you participate in.

**SUB CONTRACTS**

**Sub Contract Information**

[← Back](#)

Show **10** entries Search:

Contract	Awarded	Prime Name
CT 10030800809	03/09/2010	Hdr Engineering
CT 10020300673	02/03/2010	Charles N. White Construct

**SUB CONTRACT DETAILS**

**CT 10030800809 - Hdr Engineering Inc / Hdr/Claunch & Miller**

[← Back](#)

Show **10** entries Search:

INV_NO	INV_DATE	PAYMENT_DATE	AMOUNT	AWARD AMT	CERTIFIED	GENDER	ETHNIC	MBEWBE
199774-H	05/25/2010	05/25/2010	\$1,555.67	\$0.00	Y	M	A	MDB
206422-H	07/21/2010	07/21/2010	\$4,202.18	\$0.00	Y	M	A	MDB
213744-H	08/31/2010	08/31/2010	\$859.66	\$0.00	Y	M	A	MDB
227890-H	11/01/2010	11/01/2010	\$1,239.03	\$0.00	Y	M	A	MDB

Showing 1 to 4 of 4 entries

First Previous 1 Next Last

# Compliance Plans

- You can view the Compliance (Subcontracting) plans that your firm is listed upon.

COMPLIANCE PLAN

## Compliance Plan Information

 Back

Show  entries Search:

Contract	Award Date	Prime	Description	Subcontract Amount
CT 10030800809	03/09/2010	Hdr Engineering Inc / Hdr/Claunch & Miller	Intergrated Solid Waste Management Master Plan	\$0.00
CT 10020300673	02/03/2010	Charles N. White Construction Company / White Construction Company	Municipal Court and Police Northeast Substation - D.B.	\$4.90

# AFO – The Contract Catalog

The screenshot displays the 'Austin Finance Online' website, specifically the 'Contract Catalog' section. The header includes the Austin City Connection logo and the text 'Austin Finance Online' and 'City of Austin - Financial and Administrative Services'. A navigation menu at the top lists: HOME, FINANCIAL DOCUMENTS, CONTRACT CATALOG (selected), eCHECKBOOK, UNCLAIMED PROPERTY, OFFICES, and FAQ. A secondary menu below lists: MAIN, CONSTRUCTION, GOODS, NON-PROFESSIONAL, PROFESSIONAL, COOPERATIVE, SINGLE SOURCE, and OTHER. The main content area features a grid of icons for 'CONSTRUCTION', 'COMMODITIES (GOODS)', 'NON PROFESSIONAL', 'PROFESSIONAL', 'COOPERATIVE & INTERLOCALS', 'SOLE & SINGLE SOURCE', and 'OTHER CONTRACTING'. To the right, a 'Welcome to the Online Contract Catalog!' message is followed by a search bar with a 'Keyword' dropdown, a search input field, and 'Go!' and '?' buttons. Below the search bar is an 'Additional Resources' section with links for Survey, Vendor Info, Reports, and Help. At the bottom is a 'User Guide' section with a link for 'Online Contract Catalog User Guide'.

# General Functions

- List by one of seven acquisition categories
  - Competitive - Four MWBE Categories
  - Three high-level Non-Competitive Categories
- Provide detailed search capability
- Provide details about:
  - Contracts;
  - Vendors;
  - Goods and services; and
  - Expenditures
- Support data export to Excel – save or print as you need!
- Provide additional reports - as expected!

# Searches

- Allow user to specify search limits:
  - Keyword in Document Description.
    - Document Name
    - Contract ID Number
  - Vendor Name
    - Legal
    - Doing Business As (DBA)
    - City Vendor ID Code
  - National Institute of Government Purchasing, Inc. (NIGP):
    - Commodity Code
    - Commodity Description
    - City-entered purchase description
  - All of the above simultaneously

# Reports

- All Contracts as a simple list
- Top 50 Vendors by Contract Amount
- Contracts Expiring Next 180 Days
  
- Live link to current No Contact List
  - The City's No Contact List is issued by Central Purchasing on behalf of all solicitation issuing entities in the City:
  - Central Purchasing
  - Contract Management Department
  - Economic Growth and Redevelopment Services Office
  - Real Estate
  - Austin Housing Finance Corporation
  - Note: the list was consolidated as of October 1, 2012

# Financial Documents – Purchasing

HOME	FINANCIAL DOCUMENTS	CONTRACT CATALOG	eCHECKBOOK	UNCLAIMED PROPERTY	OFFICES	FAQ
MAIN	BUDGET & FINANCE	<b>PURCHASING</b>	OFFICIAL STATEMENTS	MBE/WBE	PAYMENT REGISTER	

PURCHASING SERVICES

**Procurement Information**

DESCRIPTION	LINK TYPE
Standard Bid Documents	page link
Bid Tabulations	web form
Registered Vendor Search	page link
No Contact List	pdf
Expiring Contracts List	pdf
NIGP Commodity Search	web form

**Policies, Rules & Ordinances**

**Additional Links**

**Vendor Help**

**Additional Resources**

- o Bid Tabulations
- o Vendor Self Service (VSS)
- o No Contact List
- o CLMD No Contact List
- o Construction Procurement Notices
- o Request for Proposals for Social Services

**Contact Information**

Phone: (512) 974-2500  
 Fax: (512) 974-2388  
 Bid Packets: (512) 974-2500  
 Vendor Registration: (512) 974-2018

**Mailing Address**

City of Austin  
 Purchasing Office  
 P.O. Box 1088  
 Austin, TX 78767

**Location**

Municipal Building

# The Checkbook



## Austin Finance Online

City of Austin - Financial and Administrative Services

HOME	FINANCIAL DOCUMENTS	CONTRACT CATALOG	<b>eCHECKBOOK</b>	UNCLAIMED PROPERTY	OFFICES	FAQ
------	---------------------	------------------	-------------------	--------------------	---------	-----

<b>MAIN</b>	DEPARTMENT	CATEGORY	PAYEE	PAYMENT REGISTER
-------------	------------	----------	-------	------------------

The data contained on this website is for informational purposes only and contains expenditure information for the City of Austin. Certain Austin Energy transactions have been excluded as competitive matters under Texas Government Code Section 552.133 and City Council Resolution 20051201-002; therefore, the line amounts may not reflect the total check amount if certain Austin Energy invoices were included on the check.



DEPARTMENT



CATEGORY



PAYEE



PAYMENT REGISTER

### Welcome to the City of Austin eCheckbook

Mouse over the icons on the left for descriptions.

#### What's New

- o Prior Week Payments: 05/29/2011 - 06/04/2011
- o Current Fiscal Year to Date: 10/01/2010 - 06/04/2011
- o Prior Fiscal Year: 10/01/2009 - 09/30/2010

#### User Guide

- o eCheckbook User Guide

#### Top 5 Expense Categories

#### Top 5 Departments for Expenditures in 2010 & 2011

# Market Intelligence

- Purchasing Internet Site
  - Registered vendor information, including commodity codes provided
- Vendor Connection
  - A view into your own commercial relationship with the City
- The Online Contract Catalog
  - Contracts and Orders with vendors
- eCheckbook
  - Payments to vendors

# MI: Purchasing Internet Site

- Access the site to see who competes for City business
- Search by name, commodity keyword, commodity code
- Example: Name contains
  - Trucking
- Example: Keyword
  - Hauling
  - One from the audience
- Examples: Commodity Code
  - 00514 (Abrasives)
  - One from the audience – perhaps someone registered in Texas Combined Master Bidders List (CMBL)

# MI: Online Contract Catalog

- Once you've identified vendors in your market space, you can see what contracts they have.
- Benefits
  - On the tab for a vendor, all the other contracts in the catalog with that vendor are shown.
  - On the tab for a vendor, their registered (and certified) commodity codes are listed.
- Limitations
  - Austin Energy orders and contracts are not available yet
  - Active contracts
  - If the vendor is not "prime", meaning the direct contracting party for the city, you will not see any results. In plain terms, you will not be able to pull up contracts using a subcontractor as a starting place.

# MI: eCheckbook

- Once you've identified a vendor, you can see what we've spent with them.
- Benefits
  - The City does make payments that don't necessarily result from orders and contracts; direct payments, such as advertising, are included.
- Limitations
  - Due to data availability and volume, only October 1, 2009 (beginning of City fiscal year 2010) to date is available.
  - Credit card expenditures are not available.

## For more information:

- Austin Finance Online
  - AIMS Help Line at 974-2467
  - [PurchInfo@austintexas.gov](mailto:PurchInfo@austintexas.gov)
- Vendor Registration
  - Vendor Registration Line at 974-2018
  - [VendorReg@austintexas.gov](mailto:VendorReg@austintexas.gov)