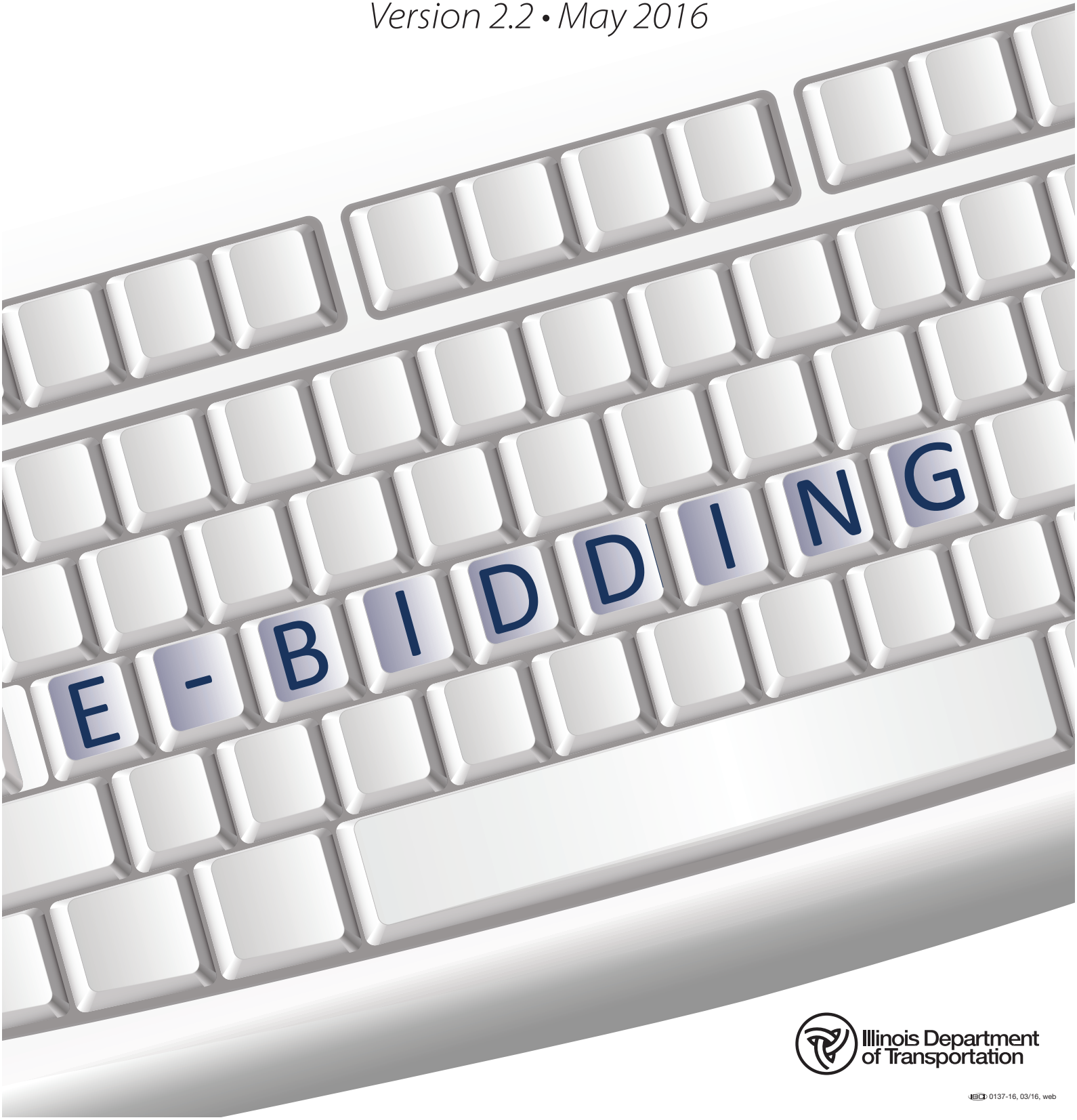
State of Illinois
Illinois Department of Transportation

Vendor Portal User Guide

Version 2.2 • May 2016



Illinois Department of Transportation

0137-16, 03/16, web

Item	Description
Document Title	IDOT Vendor Portal User Guide
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Author	Illinois Department of Transportation
Document Description	This document contains the details of how to use the IDOT Vendor Portal from the contractor point-of-view. It is intended to provide guidance on: • State of Illinois Public Account registration • Use of the Portal • Self-administered functions such as new user approval and role maintenance • Manage company profile information • Association to company(s) • Access to the electronic bidding application (iCX – Integrated Contractor's Exchange)

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Overview

About This Guide

The Vendor Portal was created by the Illinois Department of Transportation for use by companies wishing to use electronic bidding as the "prime" contractor for State of Illinois highway construction projects. The IDOT Vendor Portal requires login by State of Illinois Public Account, confirming the identity of the user. Interfacing with the iCX (Integrated Contractor's Exchange) electronic bidding application, this Portal facilitates submission of electronic bids. This guide will step the user through the process of creating a State of Illinois Public Account, logging into the Portal, registering their company, and additional user role maintenance.

Intended Audience

This guide is intended for use by Companies who wish to use the Vendor Portal to facilitate electronic bidding on State of Illinois highways projects.

System Requirements

In order to log into and view the IDOT Vendor Portal properly, it is recommended that you use Internet Explorer 9+ as your browser.

Technical Support

For help with the IDOT Vendor Portal, please contact Betsy Calcara at 217-782-9332, email Betsy.Calcara@Illinois.gov or call the Plans and Contracts Office at 217-782-7806.

For help with the iCX Application, please call ExeVision directly at 866-304-2844.

Terminology

The following terminology is used in this document and in the IDOT Vendor Portal:

Contractor	An individual or a company wishing to bid a contract with the Agency as the “prime vendor”.
Letting	A process whereby project/contract opportunities are advertised so prospective vendors can bid on them. Contracts are typically “let” by way of the Transportation Bulletin. Vendors respond to a letting with a bid proposal.
Role	A level of security within a software system that determines a person’s access to information and administrative activities. Instead of setting up access for each individual user, the administrator creates a “role” and then simply assigns that role to each user. If a person leaves that role or if security needs of a given role change, it is very easy to make these modifications to the role rather than going through the system user-by-user.
TIN	A Taxpayer Identification Number (TIN) is an employer identification number assigned by the Internal Revenue Service (IRS) when registering a company to do business in the United State.
Contractor #	A number assigned by IDOT to potential contractors.
State of Illinois Public Account	A login account created through a registration process using first name, last name, and email address. The Public Account provides a means of accessing the Vendor Portal site.
Electronic Bidding	An electronic submission of a bid proposal package for State of Illinois highway projects.

Registration

Registration is required for use of the IDOT Vendor Portal. The registration process is as follows:

- All new Vendor Portal users must create a State of Illinois Public Account in order to login
    - Users must provide their first name, last name, and email address
    - Users must create a Username and Password
- Association to Vendor(s)
    - User goes to the "My Profile" menu option and clicks the "New Vendor" button
        - User is prompted to enter the Contractor #, TIN, and Firm Name
            - The Firm Name should match tax records
    - User receives an email confirming association to the chosen Vendor and their role
        - The first user to associate to a vendor is automatically assigned the role of Administrator
    - Additional users are approved or rejected by the Administrator
        - If approved, the user will receive an email stating approval.
        - If rejected, the user will receive an email stating rejection. The email will also direct the user to contact the IDOT Contract's Office for an explanation of the rejection decision.
        - The Administrator will assign roles to additional users
            - Administrator (Owners, Principals, Signature Authority)
            - Users (Estimators)
- Joint Ventures
    - The managing party in the Joint Venture will receive a contractor number with approved bid authorization. User goes to the "My Profile" menu option and clicks the "New Vendor" button. User is prompted to enter the Contractor #, TIN, and Firm Name (Joint Venture name)
        - The first user to associate to the Joint Venture is automatically assigned the role of Administrator
        - If Joint Venture information submitted is correct, IDOT will approve the Joint Venture. User receives an email confirming association to the Joint Venture
        - If rejected, the user will receive an email stating rejection. The email will also direct the user to contact the IDOT Contract's Office for an explanation of the rejection decision.
    - Additional users for the managing party in the Joint Venture or the second company, are approved or rejected and assigned a role by the Administrator
        - If approved, the user will receive an email stating approval.
        - The Administrator will assign roles to additional users
            - Administrator (Owners, Principals, Signature Authority)
            - Users (Estimators)
- Roles
    - There are two roles in the IDOT Vendor Portal
        - Administrator
            - Completes Bid
            - Submits Bid
            - Manages Users
        - User
            - Completes Bid

System Access

Access to the IDOT Vendor Portal is located at:

https://webapps.dot.illinois.gov/VendorPortal/

A valid State of Illinois Public Account is required for login. To obtain your Public Account or reset your login password, go to the IDOT Vendor Portal website address and you will automatically be redirected to the account creation/reset password screens:

https://webapps.dot.illinois.gov/VendorPortal/

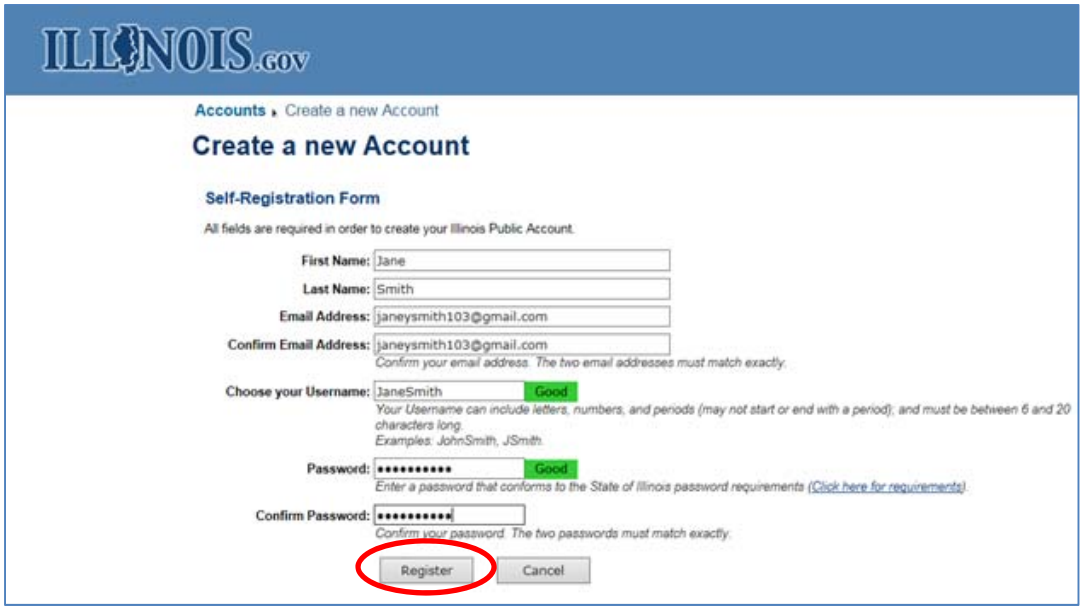
PLEASE NOTE: When creating your Public Account, please use your name. This ID is specific to the individual logging into the IDOT Vendor Portal, not the company!

To create a State of Illinois Public Account for new users:

1. Click "Public Account"

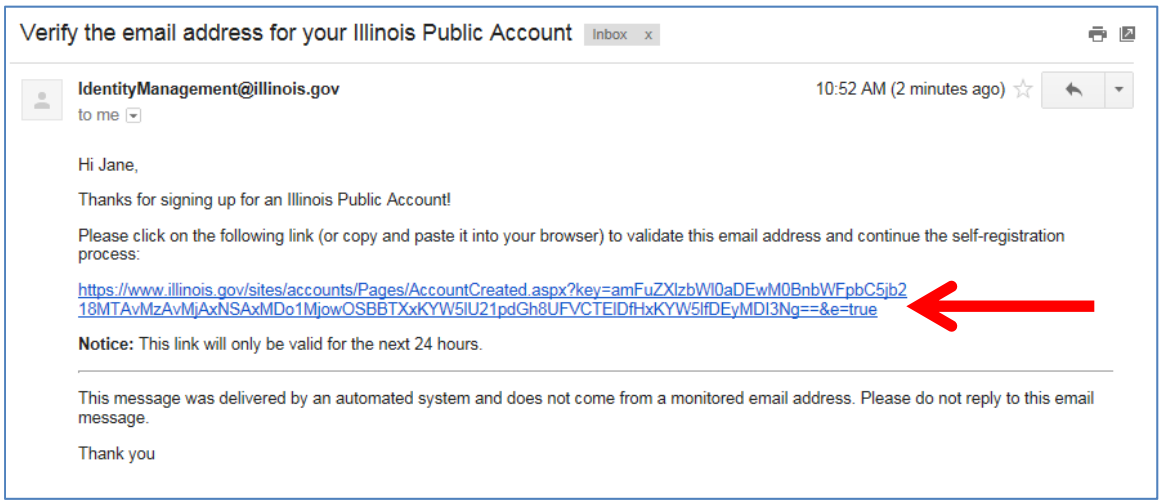
2. Click “Create a new account”

3. Enter your First Name
4. Enter your Last Name
5. Enter your Email Address
6. Confirm your Email Address by entering it again
7. Choose your Username
8. Create a Password (Note: Click “Click here for requirements” to review the password complexity requirements.)
9. Confirm your Password by entering it again
10. Click “Register”



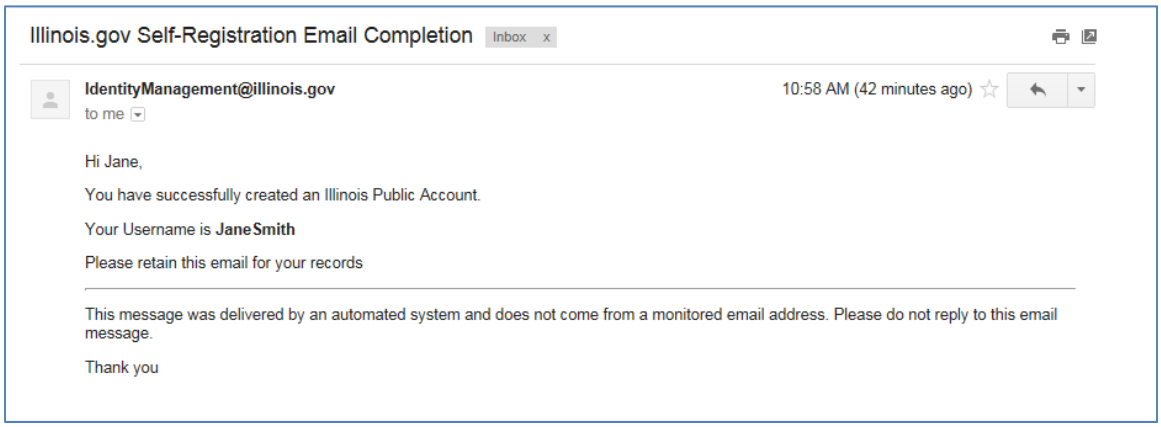
11. A confirmation email has been sent to the email address you provided above

Click the link provided in the confirmation email to continue the self-registration process



12. Click “Continue”

You now have a State of Illinois Public Account. You will receive an email identifying the Username you created.



Illinois.gov Self-Registration Email Completion Inbox x

IdentityManagement@illinois.gov 10:58 AM (42 minutes ago)

to me

Hi Jane,

You have successfully created an Illinois Public Account.

Your Username is **JaneSmith**

Please retain this email for your records

This message was delivered by an automated system and does not come from a monitored email address. Please do not reply to this email message.

Thank you

Unable to Access Public Account

In the event you do not know your password **AND** the email account you used when creating the account is not accessible, contact IDOT immediately. This situation requires intervention by the Illinois Department of Central Management Services.

Betsy Calcara
Betsy.Calcara@Illinois.gov
217-782-9332
Or
Call the Plans and Contracts Office at 217-782-7806

Password Reset

If you forget your password or it has expired, you can reset your password from the IDOT Vendor Portal login screen at:

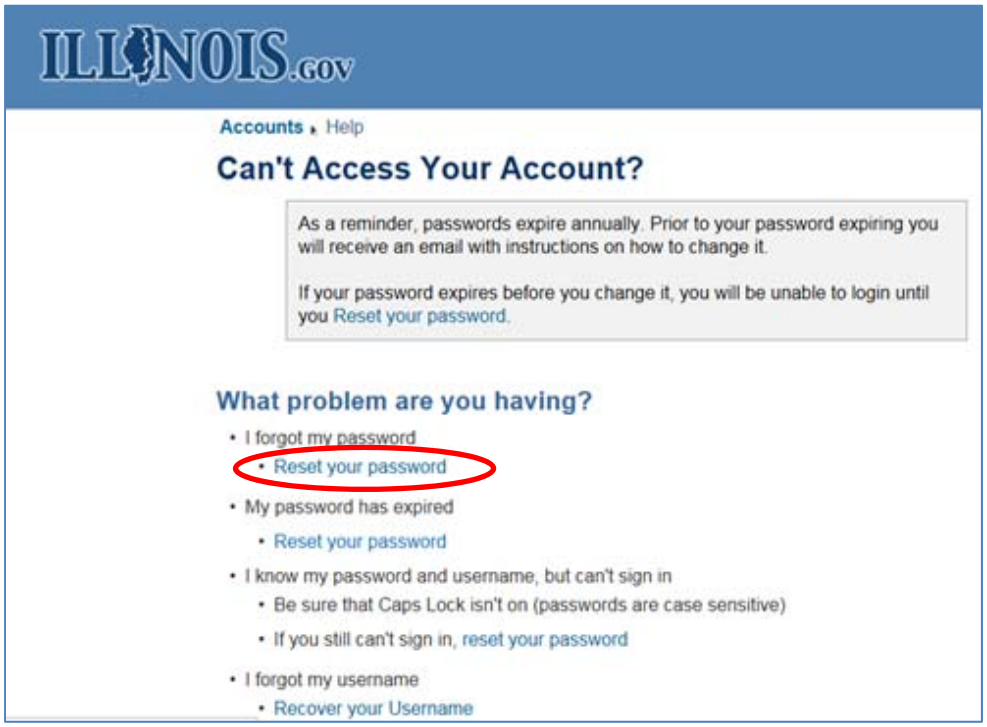
https://webapps.dot.illinois.gov/VendorPortal/

To reset your password:

1. Click "Public Account" (Note: This screen may not display if it is cached in your browser history.)

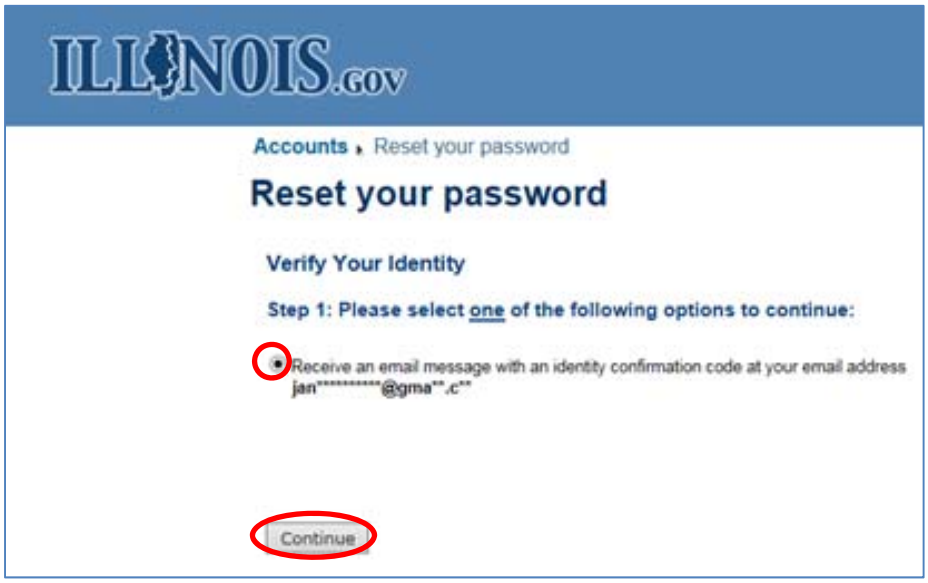
2. Click “Can’t access your account?”

3. Click “Reset your password”

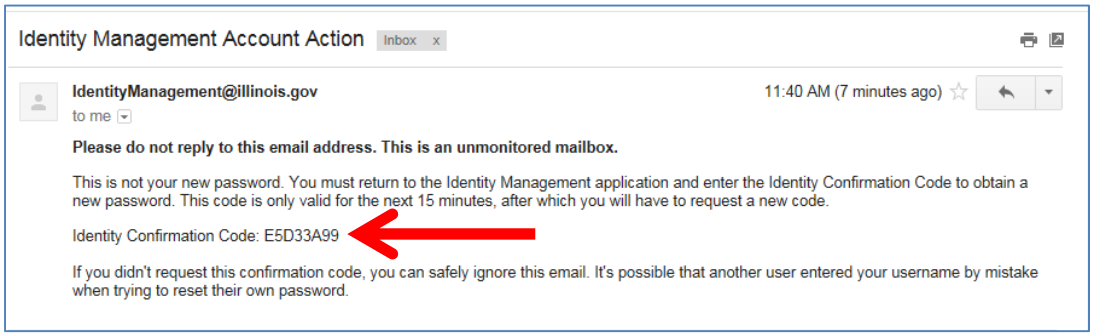


4. Enter your Username
5. Enter the image code provided
6. Click “Continue”

7. Click “Receive an email message with an identity confirmation code at your email address”
8. Click “Continue”

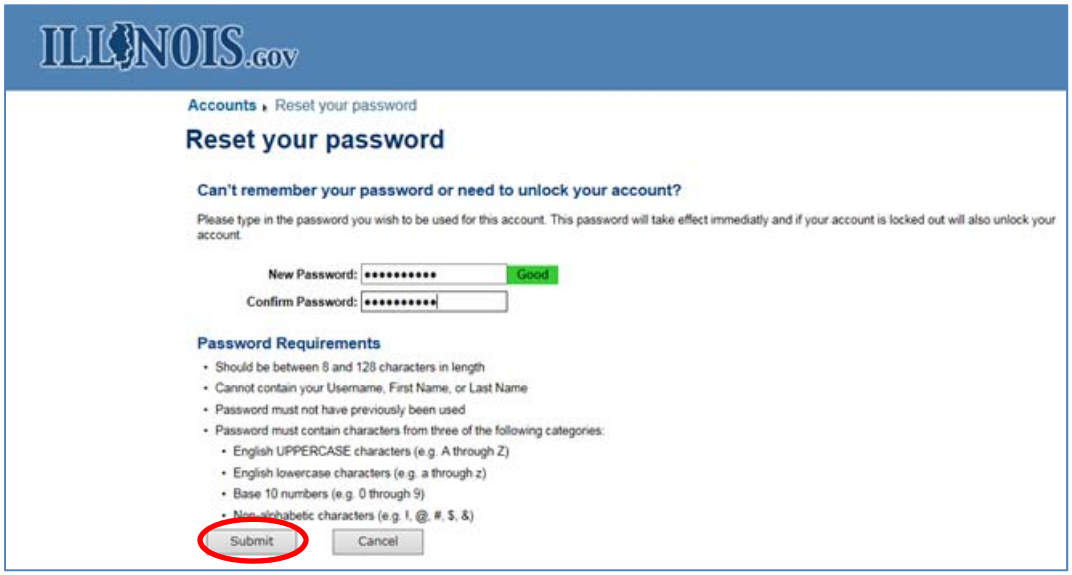


9. Copy the Identity Confirmation Code received in the password reset email



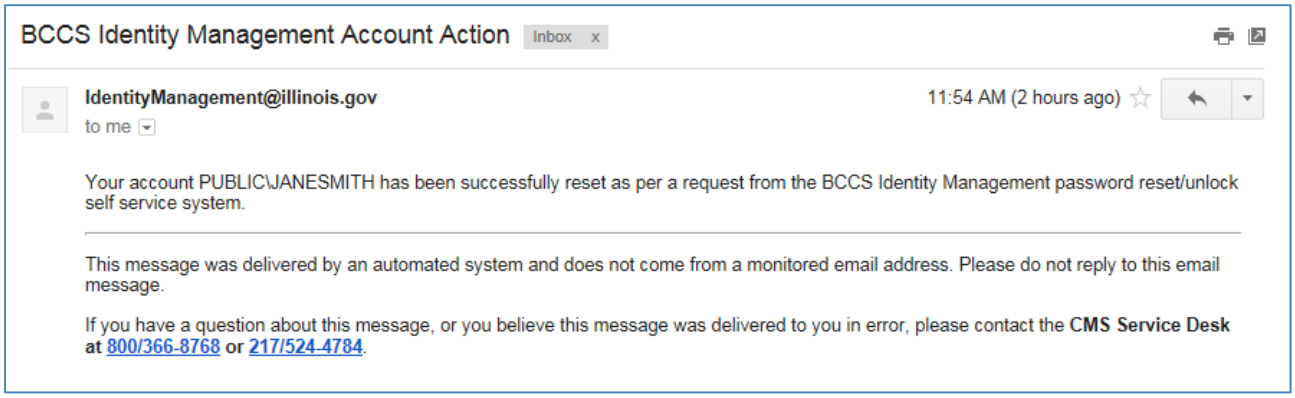
10. Paste the Identity Confirmation Code
11. Click “Continue”

12. Enter a New Password
13. Confirm the New Password by entering it again
14. Click “Submit”



Your account password is successfully reset. A successful password reset message displays on the screen.

A successful password reset email is received.



Vendor Portal Login

Once you have created your State of Illinois Public Account, you are ready to login to the Vendor Portal.

To login to the Vendor Portal:

1. Go to https://webapps.dot.illinois.gov/VendorPortal/
2. Click "Public Account" (Note: This screen may not display if it is cached in your browser history.)

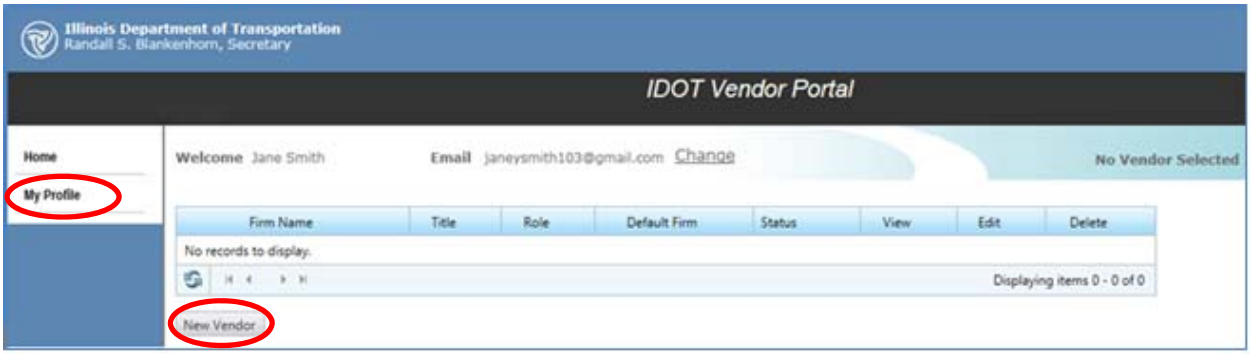
3. Enter your Username and Password
4. Click "Sign in"

Initial Vendor Registration

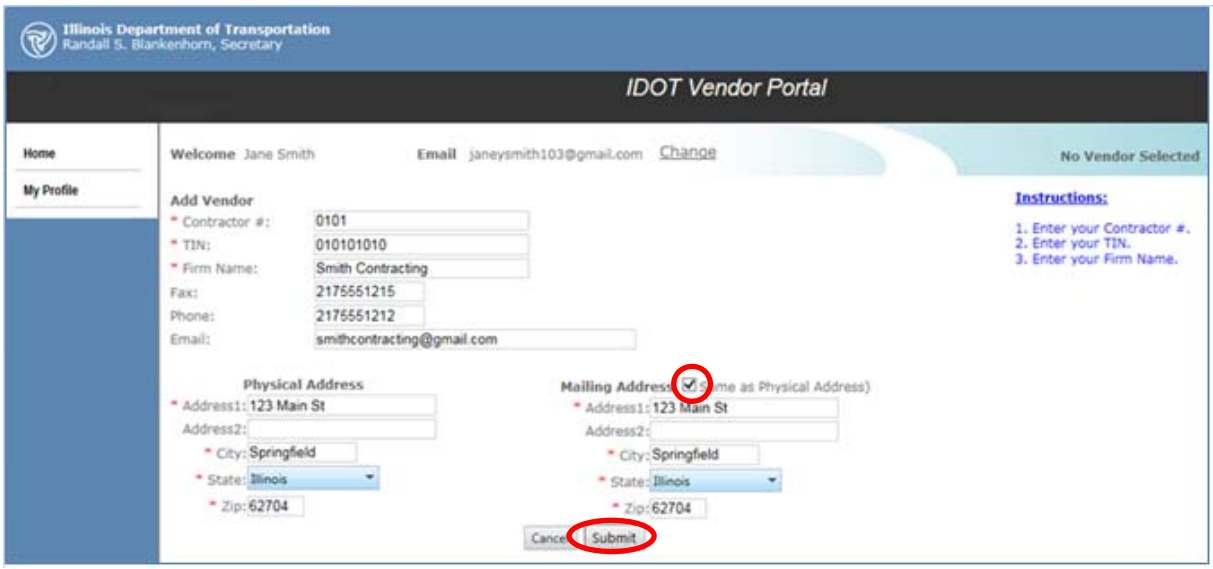
You are now ready to register your company. The first person to associate to your company should possess signature authority. As the first person, you will automatically be assigned the role of Administrator.

To register your company:

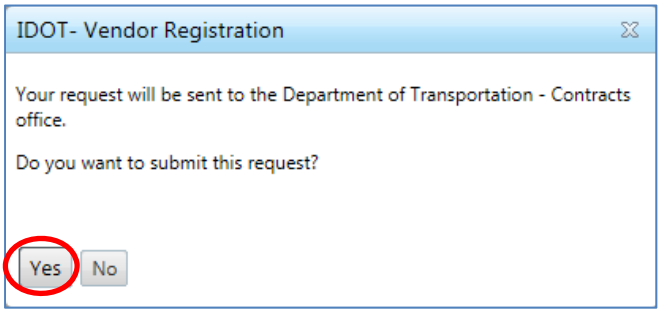
1. Click “My Profile”
2. Click “New Vendor”



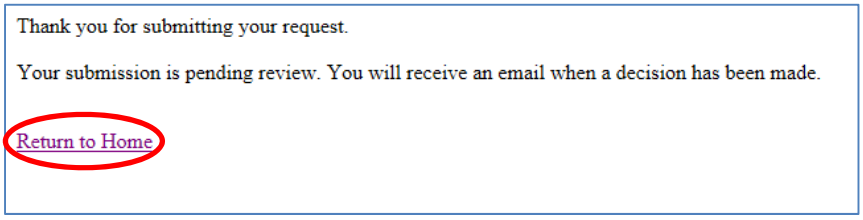
3. Enter you Contractor # and then press Tab on the keyboard
4. Enter your TIN
5. Enter your Firm Name
6. Enter your Fax number
7. Enter your Phone number
8. Enter your Email address
9. Enter your Physical Address
10. Enter your Mailing Address if it is different than your Physical Address
    a. Click “Same as Physical Address” if both addresses are the same
11. Click “Submit”



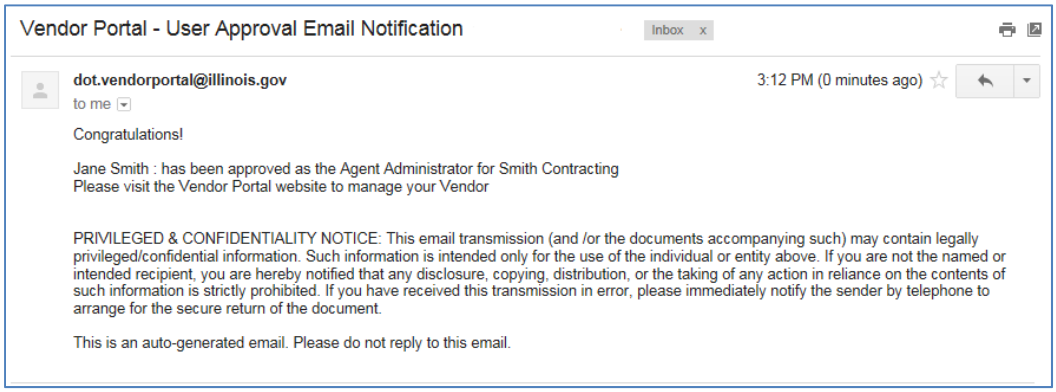
12. Click “Yes” in the message to submit the request



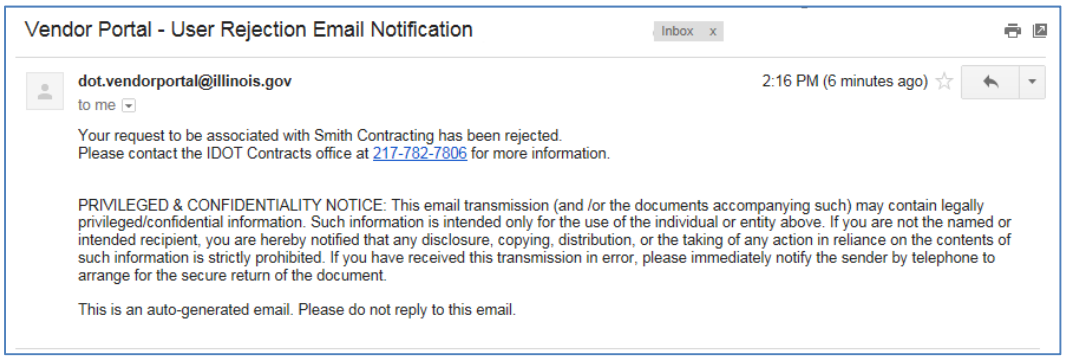
13. Click “Return to Home” in the message confirming that your request was submitted



14. The IDOT Contracts Office will receive notification of your request, and will either approve or reject your request
    a. If your request is approved, you will receive a confirmation email



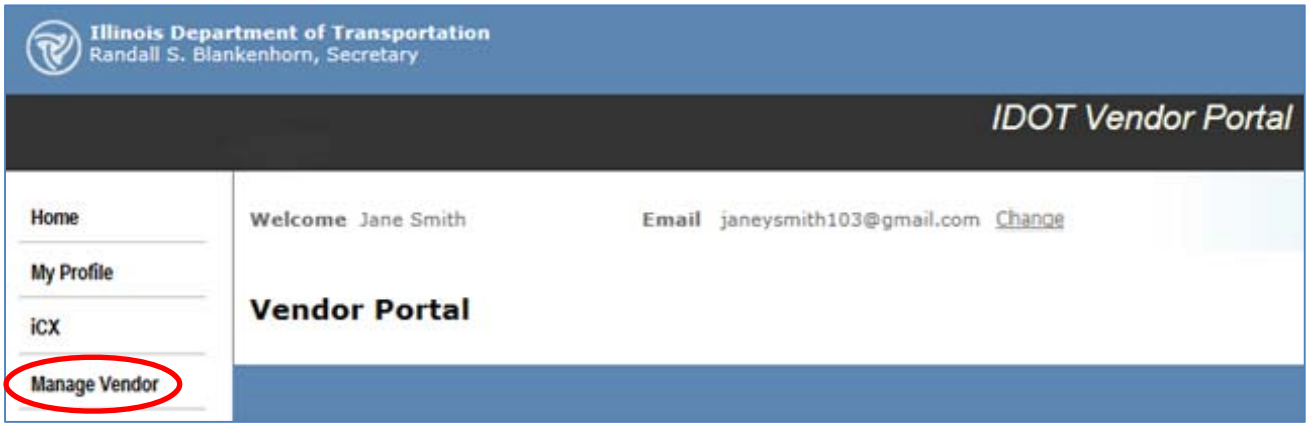
    b. If your request is rejected, you will receive a rejection email



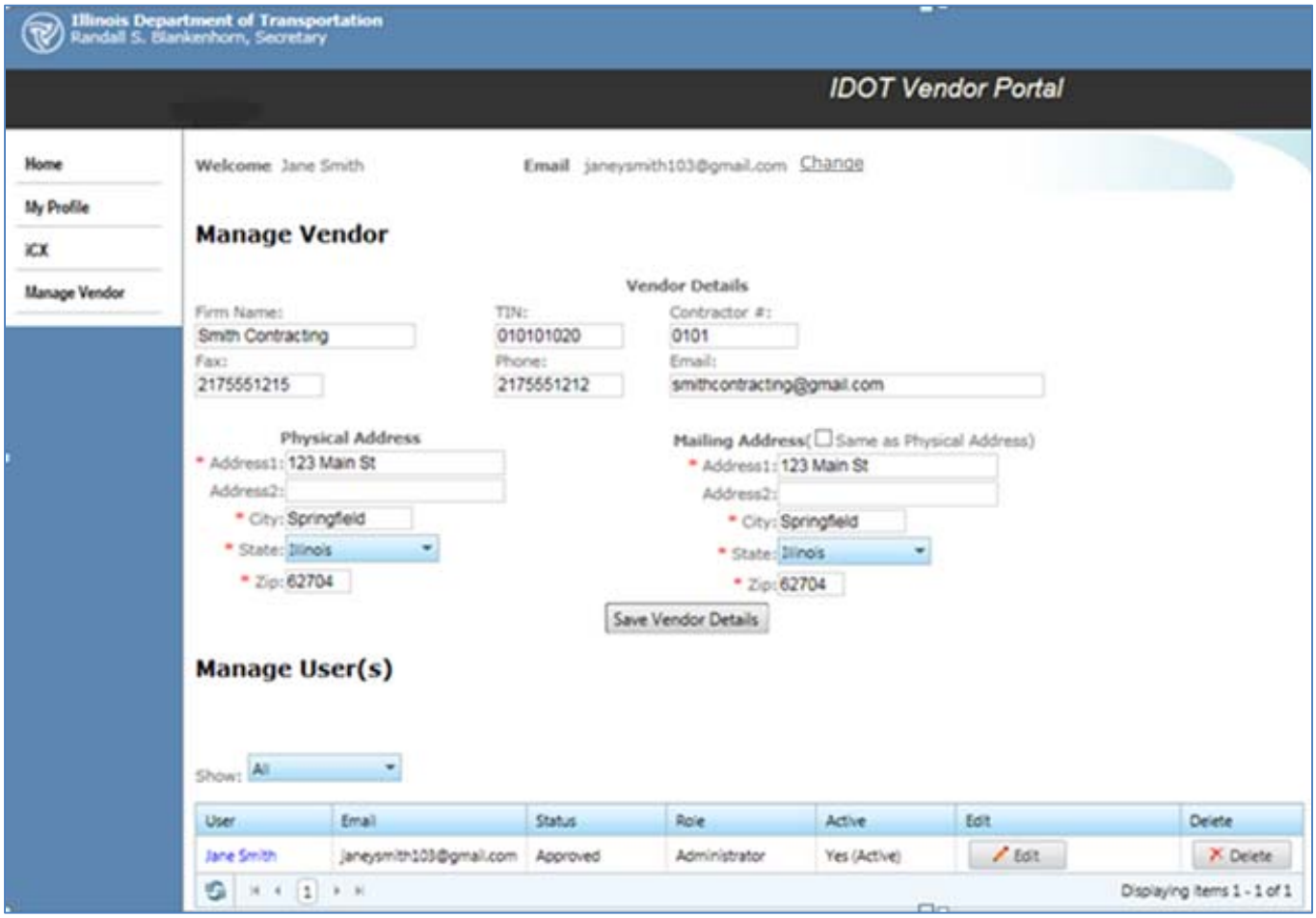
Manage Vendor Details

To view your company's details:

1. Click "Manage Vendor"



Your company's information and associated users will display in the fields.



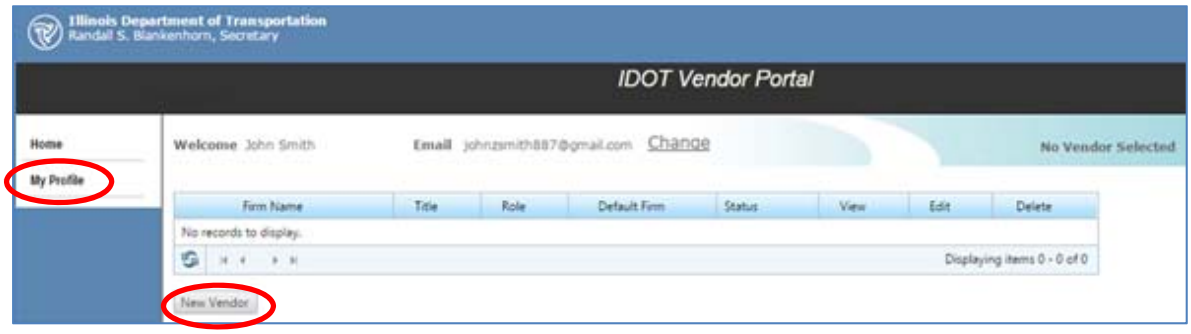
User Registration

If your company is registered and approved by IDOT, other users from your company may now register. **If users do not have a State of Illinois Public ID, they must create one for themselves.**

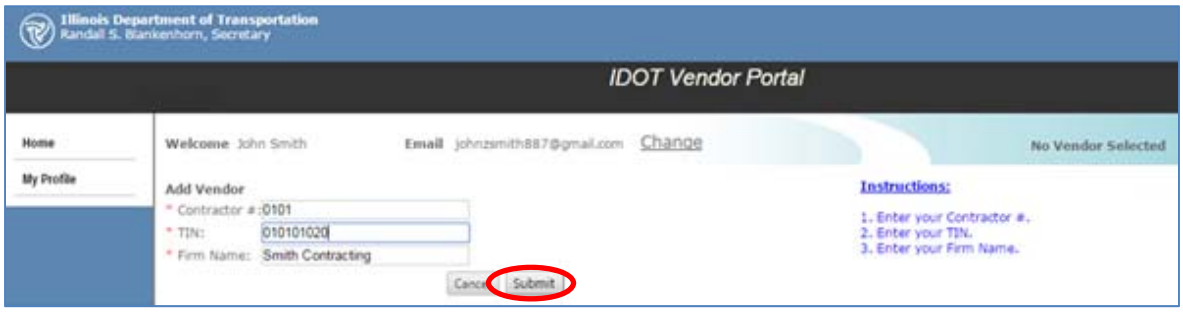
It is now your company's Administrator(s)' responsibility to manage user associations to the company.

User must log into the Vendor Portal:

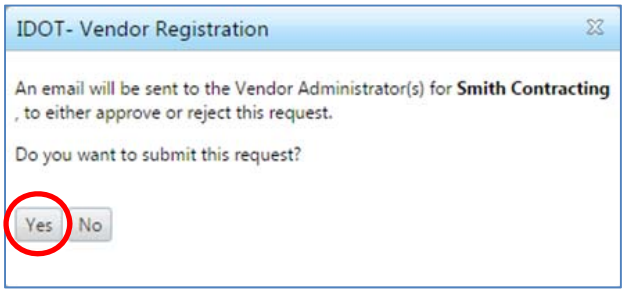
1. Click "My Profile"
2. Click "New Vendor"



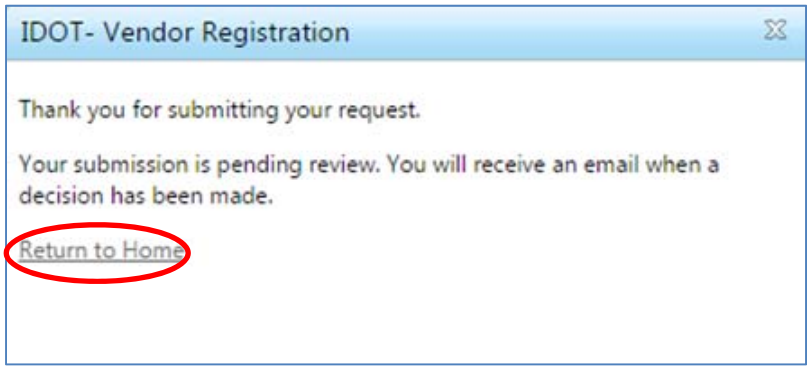
3. Enter your Contractor # and then press Tab on the keyboard
   a. The Firm Name will automatically populate because the company has already been registered
4. Enter your company's TIN
5. Click "Submit"



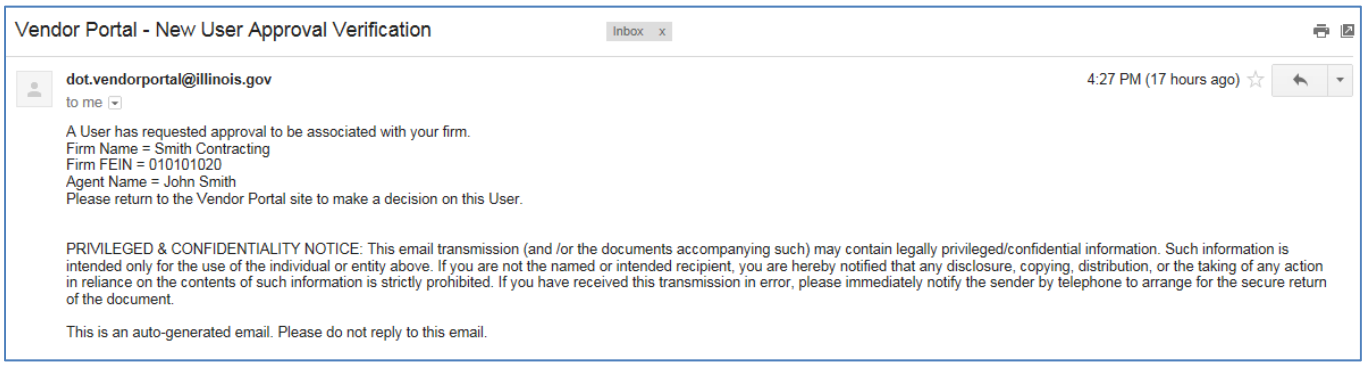
6. Click “Yes” in the message to submit the request



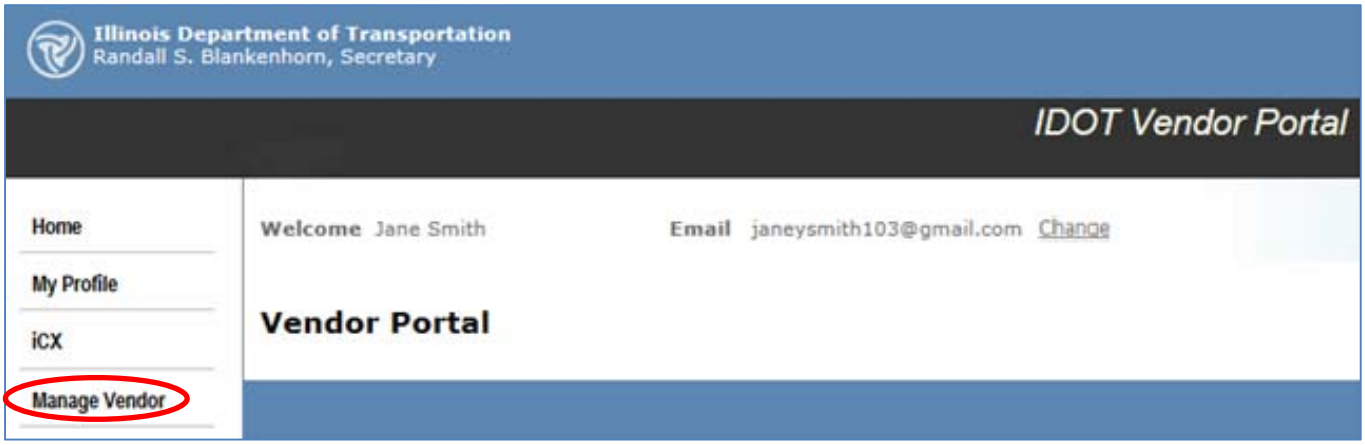
7. Click “Return to Home” in the message confirming that your request was submitted



8. The Administrator within your company will receive an email notification of your request to be associated to the company

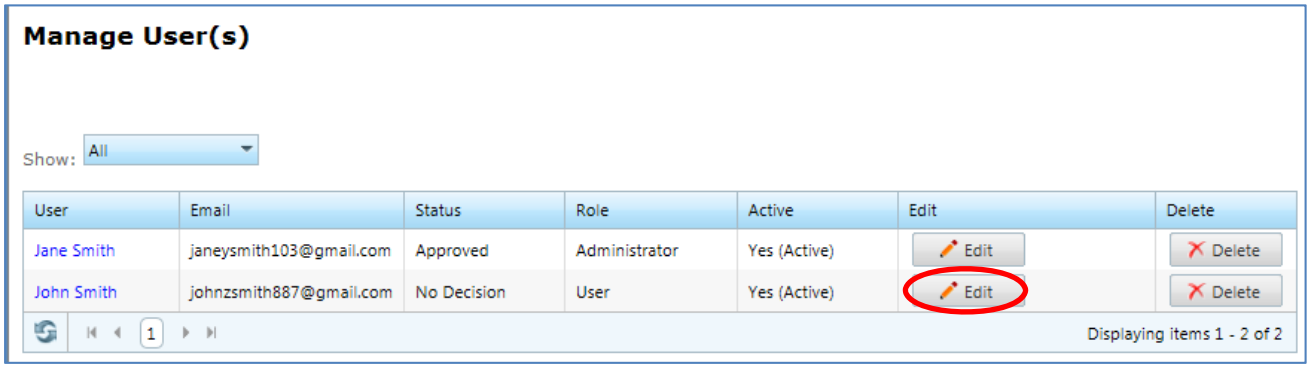


9. The Administrator logs into the IDOT Vendor Portal and navigates to the “Manage Vendor” menu option

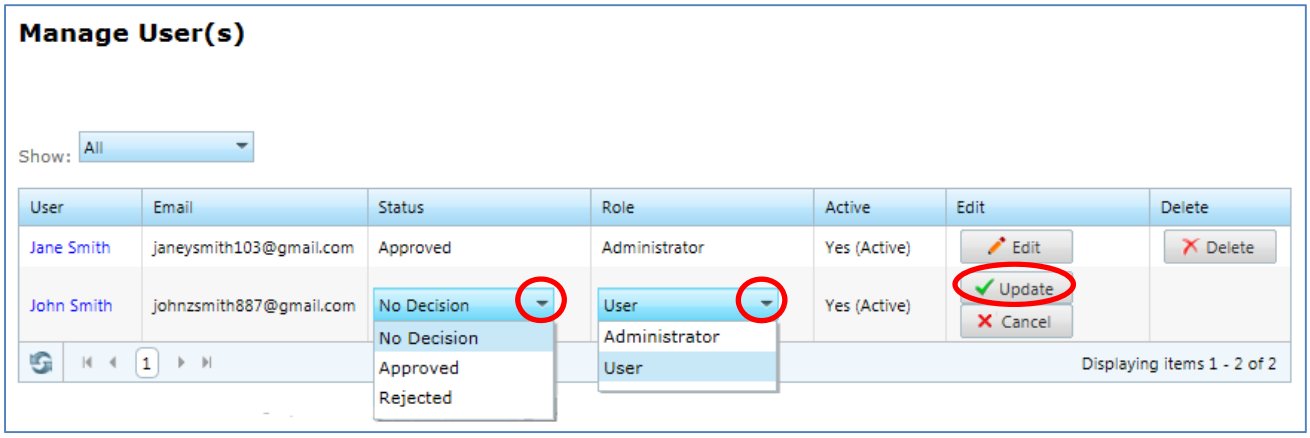


In the Manage User(s) portion of the Manage Vendor screen, the new user’s name and email address appear in the grid. To approve the user:

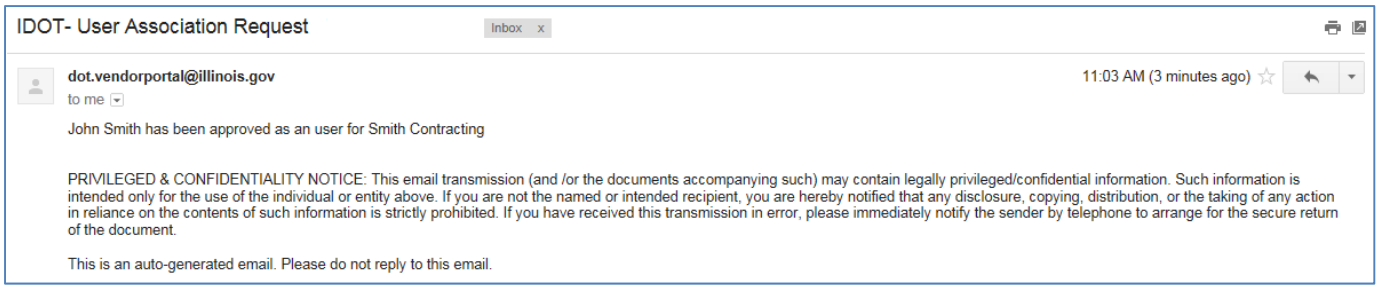
1. In the Edit column, click “Edit”



2. In the Status column, click the drop down arrow
3. Click “Approved” (or “Rejected” if necessary)
4. In the Role column, click the drop down arrow
5. Click the appropriate Role (Note: If the user request was rejected, there is no need to choose a role.)
6. In the Edit column, click “Update”



The user association request is now approved (or rejected if necessary). The user will receive an email notification of the approval (or rejection).

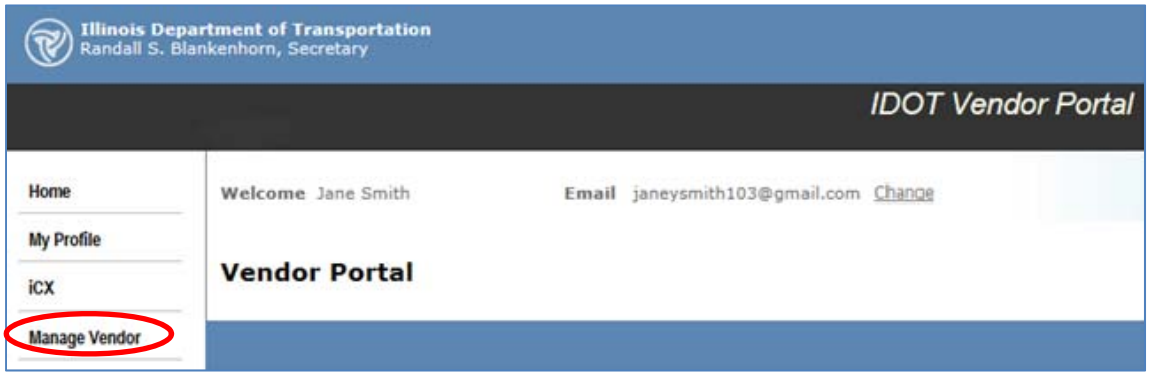


User Management

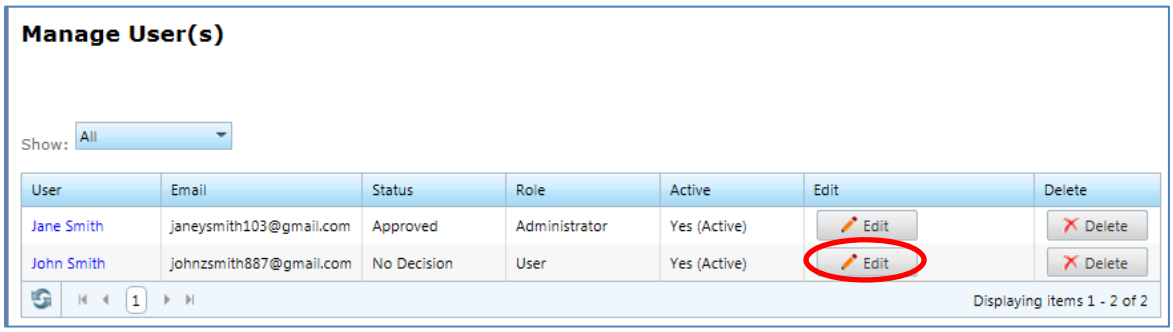
If you are an Administrator for your company, you are responsible for managing users. If a user is already associated to your company and needs their role to be changed, or a user needs deleted, you can do these actions through the Manage Vendor/Manager User(s) screen in the Vendor Portal. **It is imperative you manage users immediately who leave your company!**

To change a user's role:

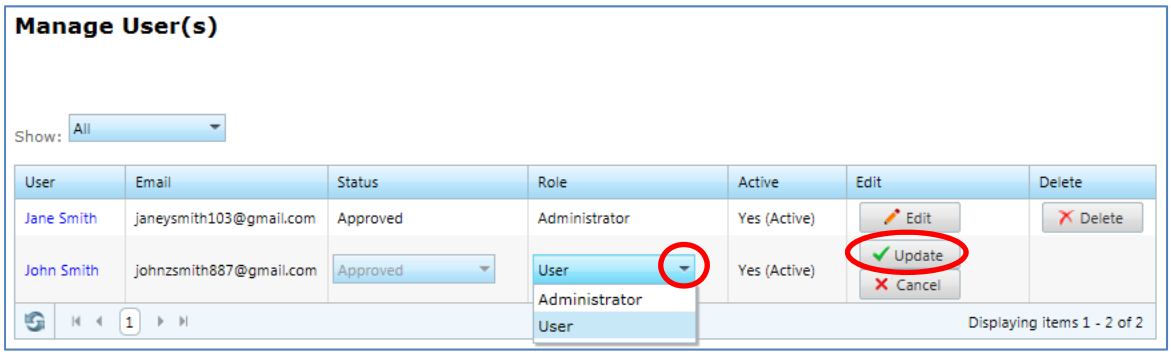
1. Click "Manage Vendor"



2. In the Edit column, click "Edit"



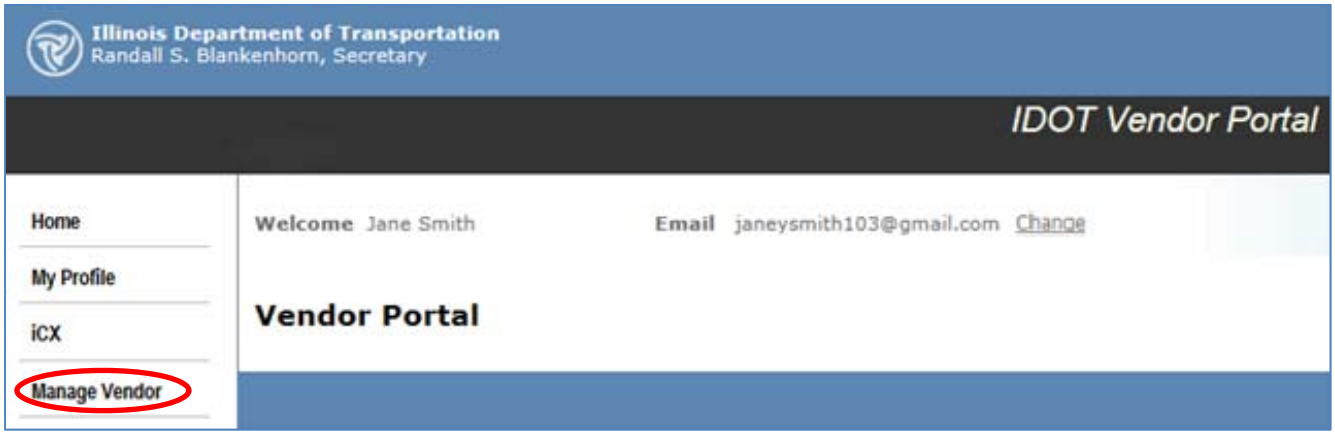
3. In the Role column, click the drop down arrow
4. Click the appropriate Role
5. In the Edit column, click "Update"



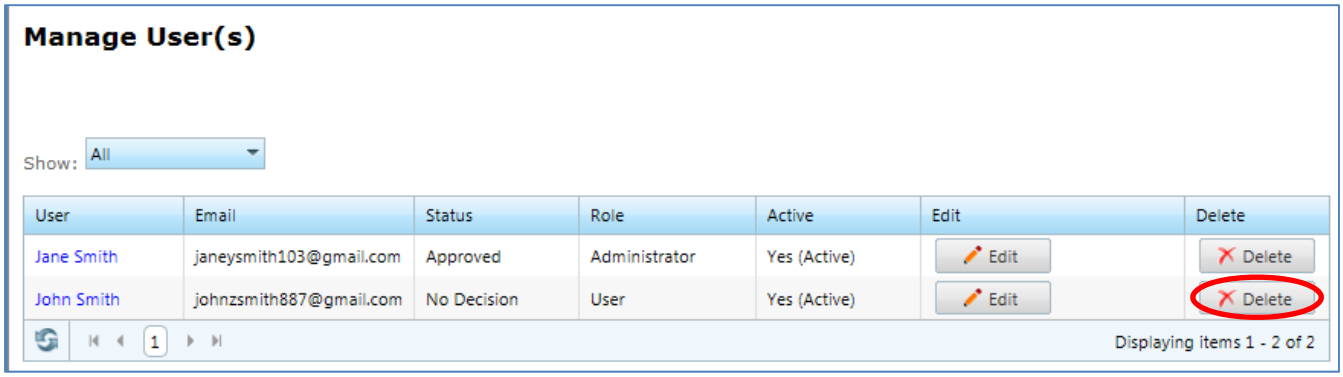
The user's Role is now changed.

To delete a user:

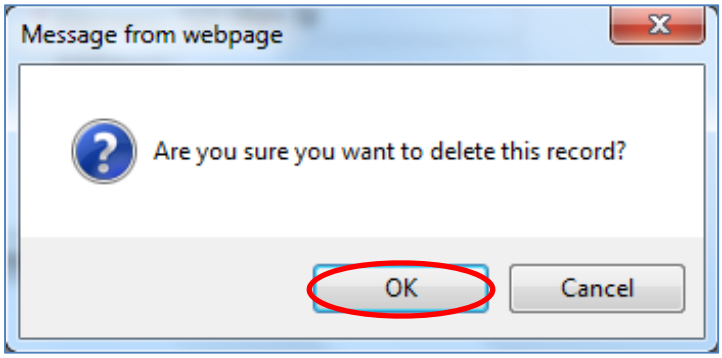
1. Click “Manage Vendor”



2. In the Delete column, click “Delete”



3. Click “OK” in the message to confirm the delete (or click “Cancel” to cancel the delete)



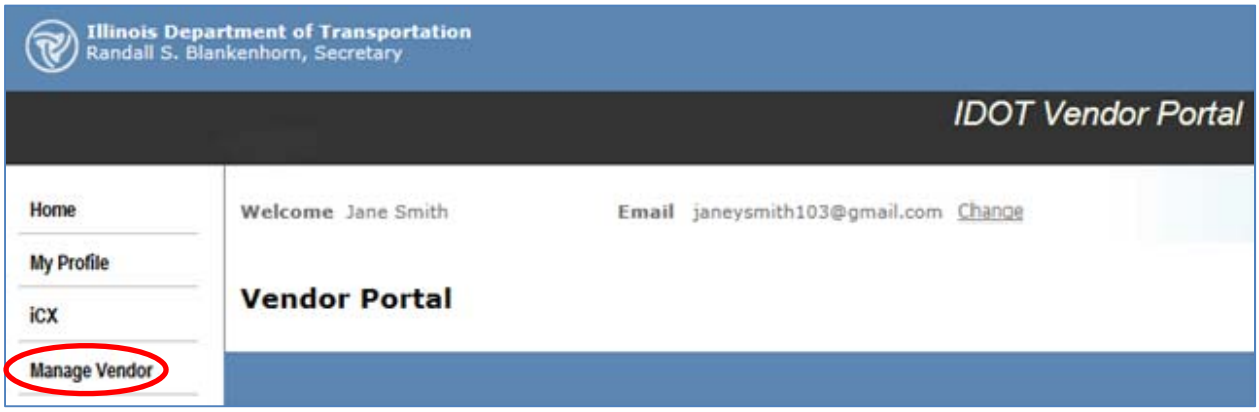
The user is now deleted and is no longer listed in the Manage User(s) grid.

Change Vendor Details

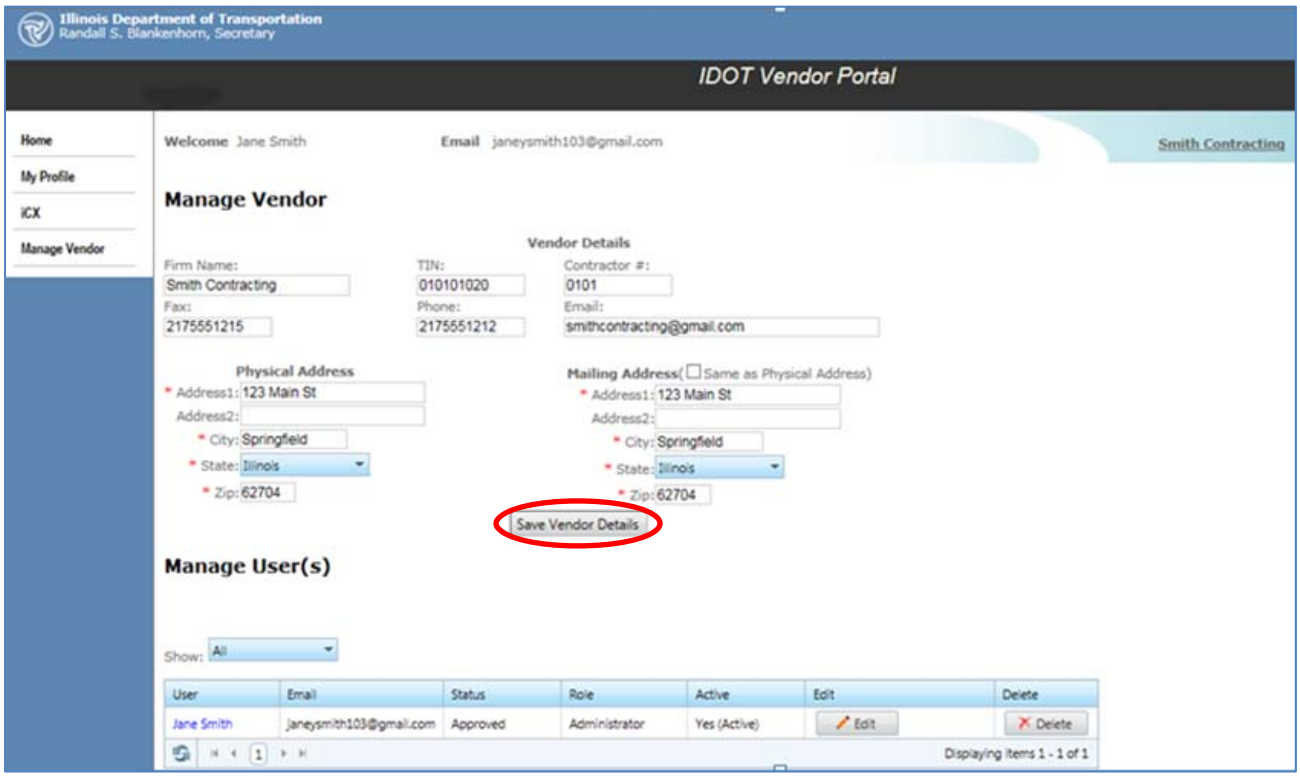
If your company's information changes, you have the ability to change the information in the Manage Vendor screen. *****Please Note: This does not relieve you of the responsibility to notify the IDOT Bureau of Construction, Pre-Qualification Section of these changes.*****

To change your company's details:

1. Click "Manage Vendor"



2. Change necessary information
3. Click "Save Vendor Details"



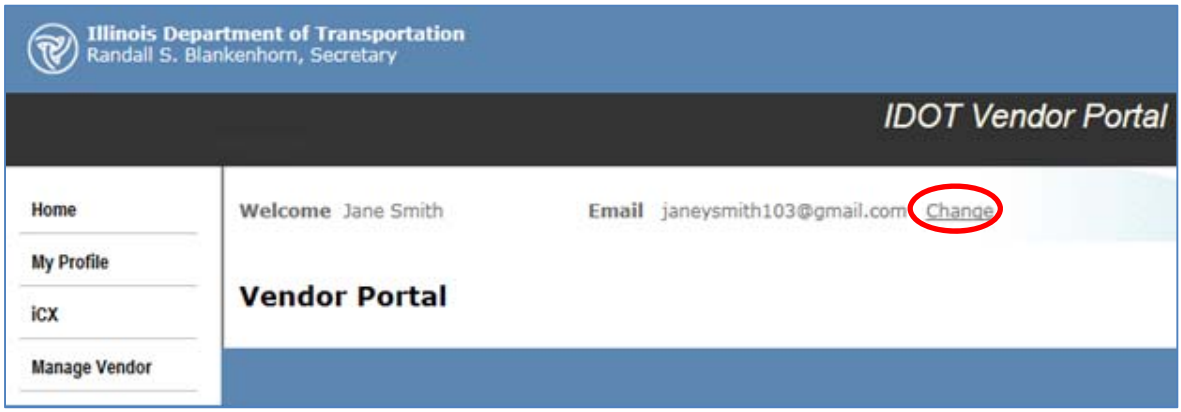
The vendor details are now changed.

Change Account Information

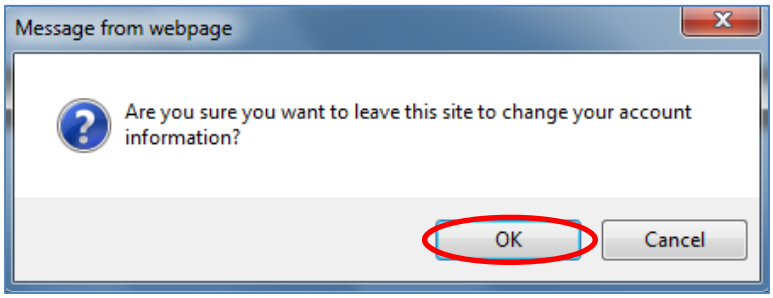
If you need to update your name or email address that you used to set up your State of Illinois Public Account, you may access your account information from the Vendor Portal site to make changes.

To update your account information:

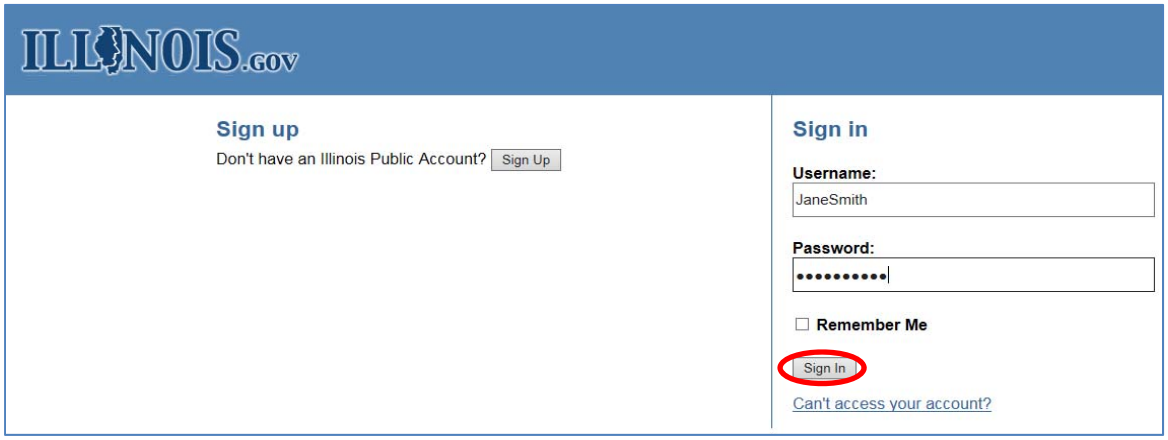
1. Click “Change”



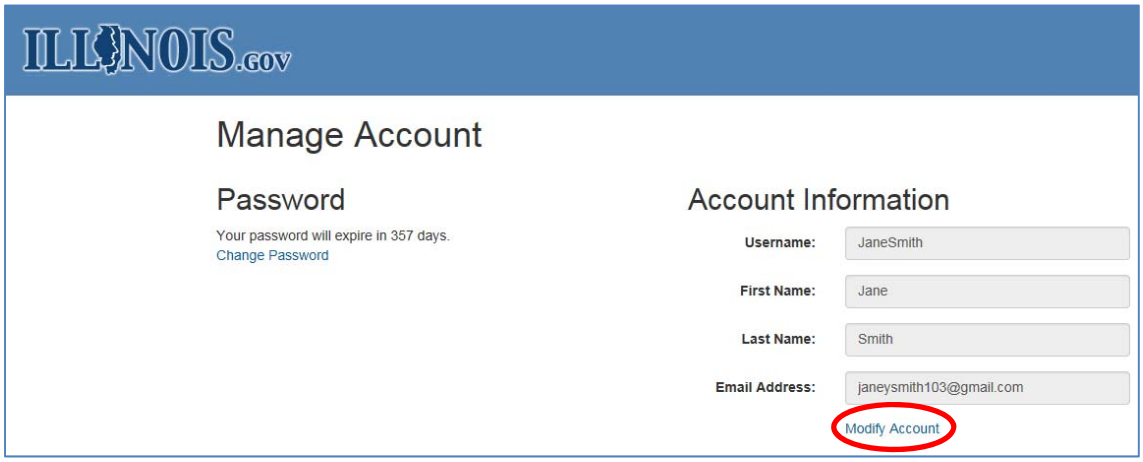
2. Click “OK” in the message to leave the Vendor Portal site



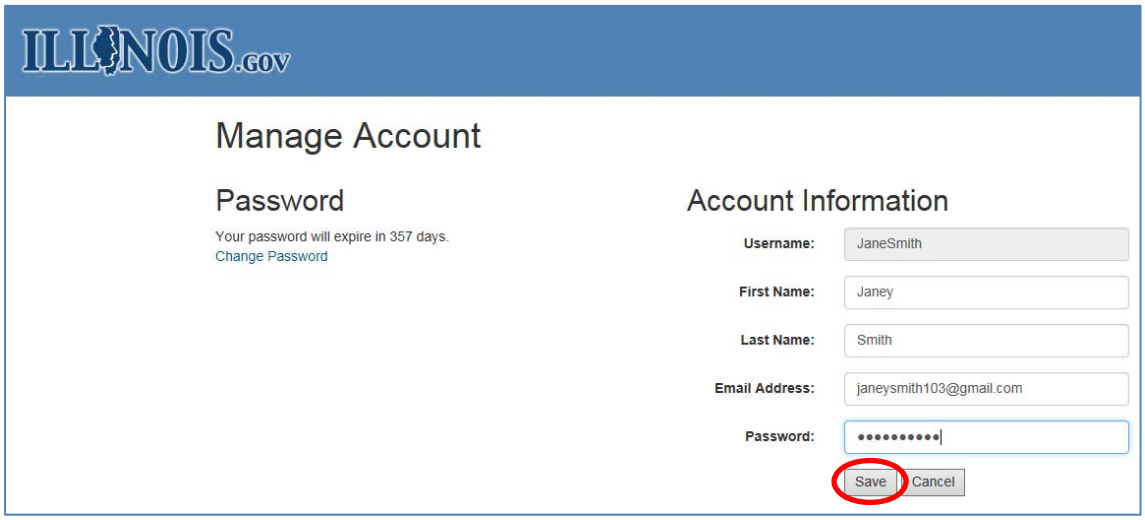
3. Enter your Username and Password
4. Click “Sign in”



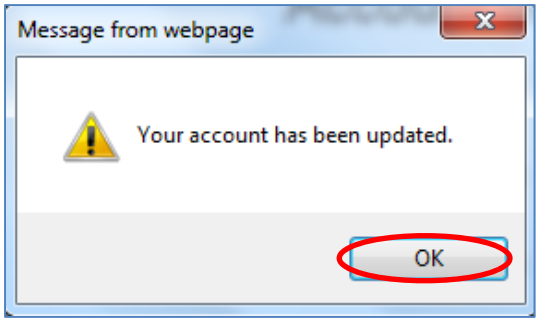
5. Click “Modify Account”



6. Change your First Name,
7. Change your Last Name, and/or
8. Change your Email Address
9. Enter your Password
10. Click “Save”



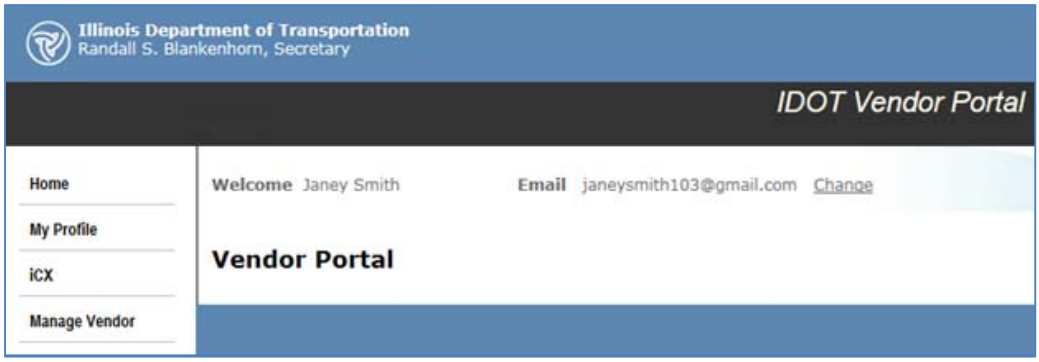
11. Click “OK” in the message confirming your account information change



12. Close the browser window
13. Reopen the browser window
14. Access the Vendor Portal at https://webapps.dot.illinois.gov/VendorPortal/
15. Click “Public Account” – Note: This screen may not display if it is cached in your browser history

16. Enter your Username and Password
17. Click “Sign in”

Your account information is now changed.

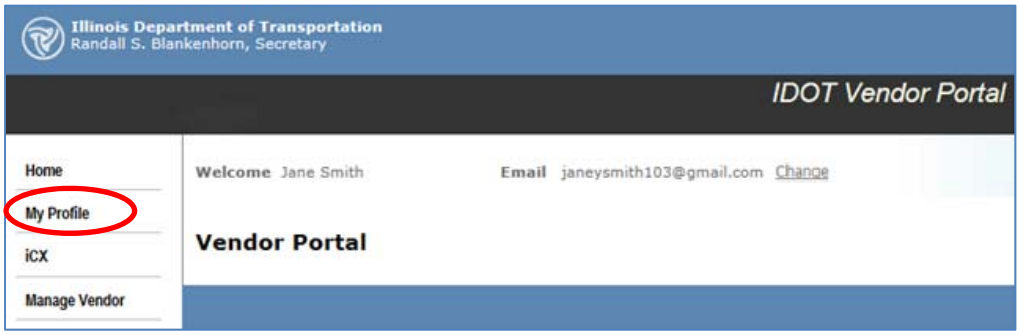


Select a Default Vendor

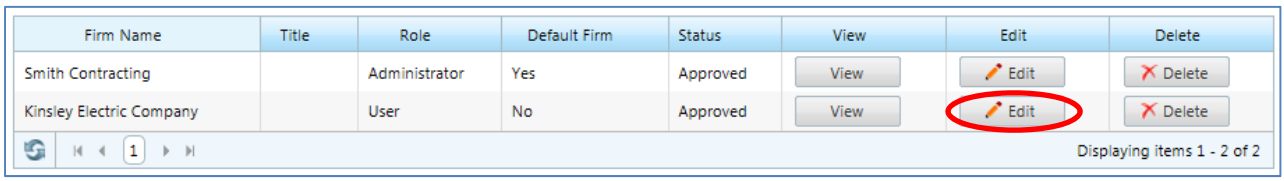
If you are registered to more than one company and would like to have one company selected automatically when you log into the Vendor Portal, you may choose to make that company your default.

To choose a default vendor:

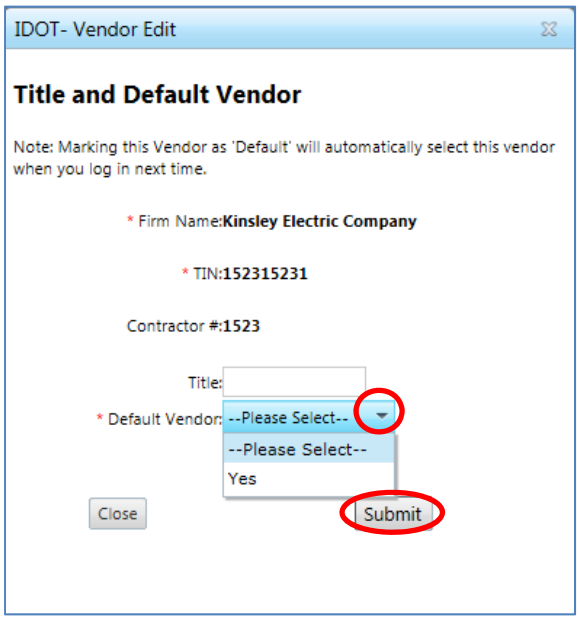
1. Click “My Profile”



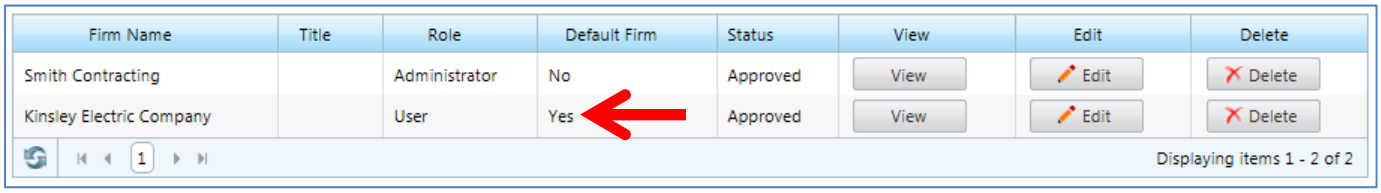
2. In the Edit column, click “Edit”



3. In the Default Vendor field, click the drop down arrow
4. Click “Yes”
5. Click “Submit”



The default company is now changed in the My Profile grid.



Firm Name	Title	Role	Default Firm	Status	View	Edit	Delete
Smith Contracting		Administrator	No	Approved	View	Edit	Delete
Kinsley Electric Company		User	Yes	Approved	View	Edit	Delete

Displaying items 1 - 2 of 2

The next time you login to the Vendor Portal, the new default vendor will display at the top of the screen.

Select a Bidding Vendor

If you are registered to more than one company, prior to accessing the iCX to submit a bid, you must have the appropriate company selected to ensure you are bidding under the appropriate company name.

To select a vendor for bidding:

1. Click the vendor name in the upper right portion of the screen (Note: This may say "No Vendor Selected" if no vendor has been selected yet.)

2. In the Vendor field, click the drop down arrow
3. Click on the company you wish to submit a bid for

The selected company now displays in the upper right portion of the screen.

Joint Venture

When bidding electronically as a Joint Venture, you must register the Joint Venture in the IDOT Vendor Portal using the newly assigned Contractor Number. Please follow the steps below:

1. The managing party for the Joint Venture should register the JV (refer to the **Initial Vendor Registration** section of this Guide for registration instructions, as this process is the same as registering your company for the first time).

2. Manage the association requests from JV members if applicable (Refer to the **User Management** section of this Guide the Approve users and assign role(s)).

3. Be sure to select the Joint Venture prior to accessing the iCX (Refer to the **Select a Bidding Vendor** section of this Guide for instructions).

For more help with Joint Ventures, please contact Betsy.Calcara@Illinois.gov or

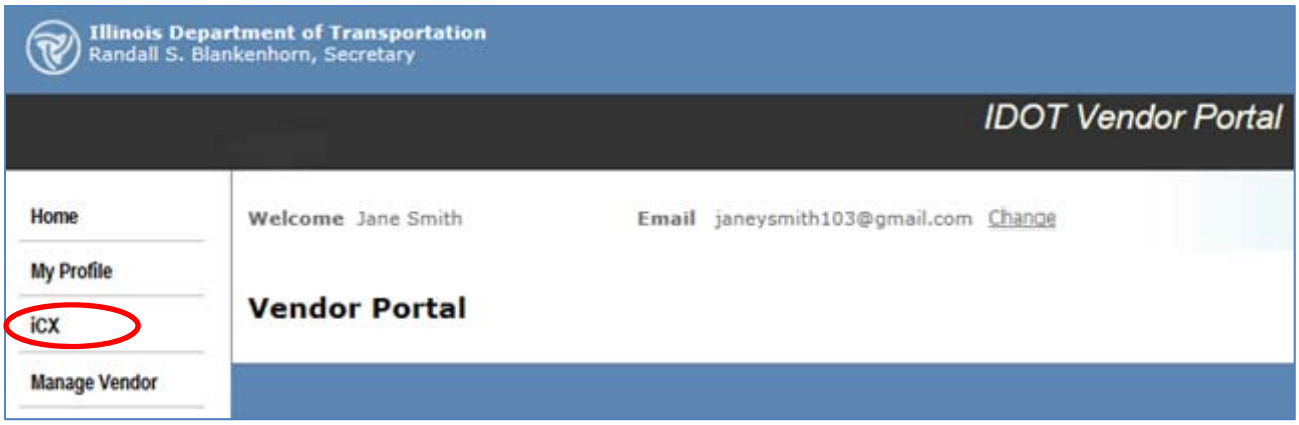
call 217-782-9332

iCX Access

Once you have selected your Vendor, you are ready to go to the iCX (Integrated Contractor's Exchange) electronic bidding application.

To access the iCX electronic bidding application:

1. Click "iCX"



The iCX electronic bidding application will launch in a new window. The Vendor Portal window will stay active.

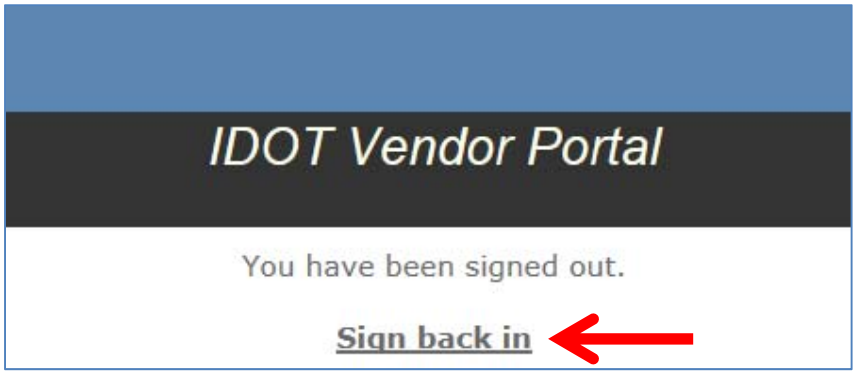
For information regarding the use of the iCX application, please click the "Help" link in the iCX application to access the searchable help files.

For additional help with the iCX Application, or to report a problem, please call ExeVision directly at 866-304-2844.

Vendor Portal Log Out

There are two ways to log out of the Vendor Portal. You can simply close the browser window, or click Logout.

To log out of the Vendor Portal:

1. Click "Logout"

You are now logged out of the Vendor Portal, and can easily sign back in if necessary.