

**FAQs - NYS Contract Reporter  
NYS Office of General Services  
Purchasing Forum  
May 18<sup>th</sup> & 19<sup>th</sup>, 2011**

**1. What does Daily publication mean?**

Ads that are successfully submitted for publication from Monday through Thursday are published the following weekday morning. Once submitted, ads are available for editing and/or deletion up until 11:59 pm, at that time they are collected by the NYSCR for publication. Ads that are submitted on Friday, Saturday or Sunday are published early Monday morning, and are available for editing up until time of publication. You cannot choose a later date for publication, the system auto-publishes on this schedule.

After publication, ads cannot be deleted from the system. An ad can be archived prior to the due date, and ads can be edited by the NYSCR System Administrator. Uploaded document attachments cannot be edited. Contact the NYSCR for more information.

**2. I need access to the NYSCR – new to the NYSCR or transfer from another agency or facility**

Generally state agencies and authorities already have an account with the NYSCR, and an agency administrator at your agency can add you as a user to the system so you can submit ads. Agency administrators are responsible for updating the roster of users for your agency. An administrator can add, delete, or modify agency locations/offices in addition to specific account users.

You can contact your Finance Office or your Purchasing Office to determine who your NYSCR Agency Admin for bid proposals is, and discuss your need for bid placement with that individual. Do not complete the “agency application” form on the NYSCR site. Do not complete a “new registration” application as that is for access to view published ads. You can always contact the NYSCR for help.

If you are a municipality, check with the NYSCR through “contact us” link to determine if your municipality has an account with the NYSCR. If the answer is no, you will be instructed to go to the website: [www.nyscr.org](http://www.nyscr.org), and click on “agency application” under Public Links in the right hand navigational menu. Complete and submit the online application for approval. More than one person in a municipality, and more than one location (office) can be added: e.g. Public Works, and Town Clerk.

**3. How do I submit my ad for publication?**

You will sign in with your user name (email address) and case sensitive password as an "agency" type user.

When you want to enter a bid solicitation (RFP, IFB, RFQ, etc.), click on "manage solicitation submissions" then "add a record" and complete the submission form. We suggest that you draft your ad text in Word and then copy and paste that language into the space provided for solicitation details.

Do not paste into any data field (e.g. contract term, location, etc.) other than the description text box, only that box has been designed to accept text from Word or similar software. Do not paste text from an email into the description text box without "scrubbing" the text through Notepad first. If a Word document has had a lot of editing during creation, scrub it through Notepad. Do not use a Word document with complex formatting, the NYSCR system will strip unique formatting and colored fonts to give a unified look to the ads.

When you have completed the form to submit your solicitation and click on "submit", you will first see a pop-up box asking if the date is correct; you will then be shown your ad on a review screen where you can proof read your ad for correctness; if correct, click on "save" and you will see a print friendly screen that will inform you that your ad was successfully submitted to the NYSCR and you will be issued an ad number.

If you do not see this page, or if you are in doubt, click on "manage solicitations submissions" again and any ads that were successfully submitted will appear in a list, and will be available for editing up until time of publication (11:59 pm on day of insertion, except Fri/Sat/Sun has until 11:59 pm on Sun for Monday publication). If you don't see it pending publication, and you didn't receive a message telling you it was received by the system, it was not successfully submitted to the NYSCR.

The NYSCR submission page offers an optional feature that permits uploading of "RFP Documents" as attachments to an ad. This optional feature allows for the uploading of bid specifications or other bid documents. Up to eight (8) separate files can be attached. First you would need to save the file to your computer, a PDF file is recommended, and use a file name that DOES NOT contain any characters such as # or % in the file name. To attach the file(s):

1. Type the name of the link you want to appear in the ad (e.g. Bid Specifications) in the Title box – ***NOTE: You MUST create a title for the attachment or it will not display in the ad.***
2. Click the "File" box
3. Click the "Search" button, a directory of your computer files will open, select the file you want copied to the ad, and click "open" button in the directory box, the file will be copied by the NYSCR system, and the Title will be the name of the link.

You will see these links at the bottom of your ad in the preview screen and in the final confirmation page. Once uploaded and published, these files cannot be edited or removed. Prior to publication, you can delete the ad and resubmit.

One advantage to using this feature is that the system captures the name and contact information for any viewer opening the ad. This is then offered to you as a downloadable Excel file, so you can keep track of activity and contact these potential bidders. Contact the NYSCR if you have any questions about this feature.

**PLEASE NOTE: if you upload attachments to the ad, do not save the file with any special characters in the file name (e.g. #, %, &, commas, etc.) The upload will not display properly.**

**Pertinent information regarding outside consultants and ad submission:**

Please DO NOT put an outside consultant's name and contact info in the data fields for Contact #1. An outside firm can only be added as Contact #2, and can also be referenced in the ad as the person to contact for the project. Putting in any info for Contact #1 other than the authorized municipality causes problems with the ad; searching and archiving of the ad are established by the Contact #1 data fields.

**4. How do I know if my ad was successfully submitted?**

After you hit the "Save" button for the last time, you should see this (sample) message:

Print this page for your records.

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**Your Record Has Been Saved**

**Ad Number: 1543490, Date Entered/Updated: 9/29/2004 8:53:12 AM**

**Click Here to return to the main Submissions screen.**

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You can print out this page and/or you can elect to have an email sent to confirm by clicking on the "Send Email Button." You can also view your ad under "Manage Solicitation Submissions", where the ad will remain available for editing or deletion up until time of publication (11:59 pm for ads submitted Monday – Thursday; 11:59 pm Sunday for ads submitted on Friday, Saturday or Sunday, for Monday publication).

If you did NOT get a confirmation, email, or could not locate your ad under "manage solicitation submissions," the ad was not successfully received by the Contract Reporter.

Infrequent users of the NYSCR site will often stop at the first page (Verify Submissions) page thinking they have finished, when a final "save" button must be clicked to reach the "confirmation page" that assigns a unique NYSCR issued number to the ad.

**5. I cannot complete my ad submission (see instructions for submission and pointers below)**

The site has been enhanced for security purposes, and the online working time for agencies has been increased. An inability to complete an ad submission may be caused by security or firewall

software preventing communication with the site. Follow these steps, and if you are still unable to submit your ad for publication, contact your IT staff for assistance:

1. Delete your browser history including all temporary internet files and cookies
2. Go to the site from a fresh search or type the address: [www.nyscr.org](http://www.nyscr.org) directly into the address line
3. Do not paste into any text box on the online submission form other than the description text box, you can import electronic "tags" from HTML or Word that the system views as a security breach.
4. If your Word document has been edited significantly, "scrub" the document through Notepad (to find: click on "start", then programs, then accessories, then Notepad) and paste from Notepad into your online submission form.
5. Make sure that you complete all datafields on the form and when you submit, and then have to save a second time (from "verification" page) to reach the confirmation page that affirmatively confirms your successful submission.

If you have trouble with a submission, do not hesitate to contact the NYSCR for help.

## **6. What is an Agency Administrator? How is that different from an "Agency User"**

You will find a list of your agency's NYSCR Administrators when you log onto the NYSCR website, on the Agency Home Page. Look for the list under the "Grants & NOFAs" box to the left of your screen. You may have to scroll down to view the list.

"Agency administrators" in the NYSCR system have all the capabilities of an Agency User, and also have enhanced capabilities and responsibilities:

- a. An Administrator is responsible for maintaining the roster of users and locations for their agency, they can add, delete or modify all user and locations. When a person in the system is transferred, promoted, or retires, it is important that their account information is updated. The Administrator logs on to the site, clicks on "Manage Accounts" or "Manage Locations" depending on the information that needs to be changed. The administrator completes or edits the online account. Once the form is completed or edited, clicking "add", "delete", or "update" user will save the desired changes.
- b. Please note: a location (office or regional facility) must exist for a user before a user account can be created. Check to see that the location exists in the database for the agency.
- c. It is a responsibility of an administrator to create another administrator when they transfer or retire from state service. It is recommended that agencies have sufficient number of administrators in their roster of users. An administrator should be a person familiar with the NYSCR system, and familiar with procurement rules and regulations.

## **New capabilities for Administrators (since June 2010):**

### **Edit a published ad:**

An Agency Administrator can edit any part of a published ad, *except* uploaded RFP documents. We leave it to the agency to determine if the change materially affects the procurement. If you want to edit an ad:

1. Log onto the NYSCR site
2. Click on “manage solicitation submissions”
3. Select the ad from the list – “published” appears next to published ads
4. Read the instructions and disclaimers – scroll down to view the submission form
5. Make the changes to the ad, and remember to “submit” to save the changes

Changes appear immediately in the NYSCR and a statement is added that the ad was edited by the Agency Administrator with name/agency name/date/time of the edit. Check your published ad to make sure that you followed all steps to submit the edits to the NYSCR for publication

### **Archive an ad before the due date:**

1. Log onto the NYSCR site
2. Click on “manage solicitation submissions”
3. Select the ad from the list – “published” appears next to published ads
4. Read the instructions and disclaimers
5. Scroll down to the bottom of the submission form and click “archive”
6. Click “okay” when the system requests verification that you want to archive the ad

The ad is immediately removed from “open” solicitations and is archived as part of the public record.

You are welcome to place an announcement that the solicitation has been cancelled, please remember that announcements appear on the site for the time period you select, but it is helpful if you make the period no less than a week so the NYSCR system accepts it properly. That announcement is not archived and does not become part of the public record.

**You cannot edit attached documents (upload RFP documents) once they have been published**  
**PLEASE NOTE: if you upload attachments to the ad, do not save the file with any special characters in the file name (e.g. #, %, &, commas, etc.)**

## **7. How can I view archived ads?**

Log onto the website: [www.nyscr.org](http://www.nyscr.org), click on the “Archived Solicitations” link and you can view all issue of the NYSCR going back to 1998. Or, if you click on “search archives” tab, you can search by keyword, category or agency. The date range on the search defaults to one year, including the current (today’s issue). If you want to change the date range, click on the month/year double arrows (3 months), or single arrows (1 month) to reach the appropriate

month/year. Click on the day in the month to highlight and lock in the new date range, or it will default to one year.

## **8. How do I contact the Contract Reporter when I need help?**

Due to the number of inquiries, the fastest method of contacting the Contract Reporter is through the website at [www.nyscr.org](http://www.nyscr.org) by clicking on "Contact Us." You can ask us to call you, but make sure you provide us with your phone number, with your extension if you have one, and tell us what your problem is. Many problems can be solved by checking information available on the site, FAQs, and following directions provided to you in response to your "Contact Us" inquiry. However, if an emergency requires immediate attention, you can call our office at: 518-292-5100.

## **9. Publication of Grant Notices**

Effective 3/1/09 the NYSCR restored the capability for state agencies and authorities to publish grants and notices of funds availability in the NYSCR. The NYS Comptroller has published G-Bulletin 217 on the requirements of grants publication:  
<http://www.osc.state.ny.us/agencies/gbull/g-217.htm>

**10. Agency/authority needs to place "sole source", single source, or an exempt ad in the NYSCR. Agencies must have an exemption from the NYS Comptroller, Authorities self-exempt in accordance with their internal procurement rules and regulations.**

### **Agencies:**

Advertising of procurements including sole source, single source and otherwise exempt procurements must be placed in the NYSCR under "manage solicitation submissions"; they will *not* be approved as announcements, which are not archived and do not become part of the public record, if you submit as an "announcement" the submission will be deleted and you will be contacted to place the ad properly for publication and archiving.

If you are an agency with an exemption from the Office of the State Comptroller, you choose option A under "exemptions"; the requirement for a due date is cancelled (appears in the ad as "n/a") and the ad appears for one week in the NYSCR. The notice of exempt procurement is then archived as part of the public record. This allows the public to search and view past procurement activity of this type. When the ad is published as an agency exempt ad, this language will appear with the ad:

*Consistent with Chapter 862 of the Laws of 1990, the agency named below is exempt from initially publishing this particular contract opportunity in the procurement opportunities newsletter, i.e., the NYS Contract Reporter.*

## **Authorities/corporations:**

Advertising of procurements including sole source, single source and otherwise exempt procurements must be placed in the NYSCR under "manage solicitation submissions"; they will *not* be approved as announcements, which are not archived and do not become part of the public record, if you submit as an "announcement" the submission will be deleted and you will be contacted to place the ad properly for publication and archiving.

If you are an authority, choose option B under "exemptions", the requirement for a due date is cancelled (appears in the ad as "n/a") and the ad appears for one week in the NYSCR. The ad is then archived as part of the public record. This allows the public to search and view past procurement activity of this type. When the ad is published as an exempt ad for a state authority, this language will appear with the ad:

*In accordance with Subdivision 5 of Section 2879 of the Public Authorities Law, the agency named below shall prepare a publicly available report no less frequently than annually which will list this contract opportunity and all other procurement contracts which were exempt from publication in the NYS Contract Reporter.*

## **11. Publication of Procurements under an agency's Discretionary Authority**

If an agency expects to exercise their discretionary authority for a procurement, that procurement must be advertised as an open competitive item in the NYSCR for the statutory 15 day advertising period. This is the Dept. of Economic Development's interpretation of the Office of the State Comptroller's rules with respect to advertising of discretionary authority procurement. In the event you have questions regarding specifics of procurement process, be sure to consult OSC for an official opinion. In addition, the NYS Procurement Council has issued an advisory bulletin on Discretionary Purchases, which includes model language for advertising discretionary purchases in the NYS Contract Reporter.

<http://ogs.state.ny.us/procurecounc/pdfdoc/DiscretionaryPurchasingGuidelines.pdf>

## **12. How to post a contract award, timing of award posting:**

For timing and details of the posting, you should confer with your finance and/or counsel's office. The law (Economic Development Law Article 4-C) says:

*At the time the agency determination of intent to award a procurement contract is made, each agency shall submit to the commissioner for inclusion in the procurement opportunities newsletter, (a) for procurement contracts let by the invitation for bid process, the result of the bid opening including the names of bidding firms and the amounts bid by each; (b) for procurement contracts let by the request for proposal*

*process, the names of firms submitting proposals and the proposal selected as the best value offer; and (c) for all other procurement contracts, the name of the proposed awardee.*

To post bid results on the NYSCR, log onto the site: [www.nyscr.org](http://www.nyscr.org); click on "post bid results" under "agency links", select the ad you want to post results for, and follow the instructions on the submission form. The instructions and description text box do not appear until the type of solicitation to be posted is selected. Then the specific instructions for that type of solicitation contract bid results posting appear. The posting can be updated, and you can upload an attachment that displays as a link to open the posting details (eg: Bid Results is the text, forming the link to open the details). This is useful in the case of a multiple results. If you have cancelled a procurement, or the advertising resulted in no award, this can be inserted into the bid results posting, confer with your counsel or finance office if you are uncertain of the posting content.

You can view your bid results posting under Site Links, and "bid results", use the search to locate the posting.

### **13. Agency has continual problems submitting and communicating with the NYSCR site:**

If you have significant or continual problems, you need to contact your IT staff. This problem can be caused by firewalls and/or security and your IT staff may have to set permissions to allow clear communication with the NYSCR website.

Your IT staff should white-list the NYSCR server and permit message delivery from our server:

Messages are sent from: [nyscr@intellisend.net](mailto:nyscr@intellisend.net)

66.109.33.120 is our server address

Please let me know if you continue to have problems so we can help you resolve your access problems..

### **14. How do I upload attachments to my ad, what advantages and disadvantages are there in uploading attached documents:**

You can "upload RFP documents", which can be for any ad including IFBs, during the submission process, or you can upload after the initial ad is entered.

To upload when you insert the ad:

1. Prepare the document(s) that you want to attach and save to your computer – Make sure that you save the file without special symbols or characters in the file name: e.g. **NO #, \$, %, \*, &**, etc. in the file title – the attachment will not display correctly.

2. Enter all information for the ad, and at the end of the submission form you will see a box to upload RFP documents (can be used for any procurement, not just RFPs)
3. You MUST put a title for the attachment in the "Title" box (e.g. "bid specifications", "bid information", etc.) The title becomes the link to open the file
4. Click the "file" box, and then click on the "Select" button. A window will open with a directory of your computer, select the file you want to attach with the name you gave as the title, and click "open" in your directory box. The NYSCR system will COPY the file, and attach it to your ad.
5. You can repeat as necessary, attaching up to 8 files (docs, pdfs, etc. not CAD files) by clicking "add" button and repeating the file naming and selection process. Maximum file size is 50 MB.
6. Click "submit", affirm the date due, the verification page will show the link at the bottom of the draft ad, click save a final time and the confirmation page will show your ad, confirm submission, and show the link at the bottom of the ad.
7. You cannot delete uploaded files. Prior to publication you can delete and reenter the ad. During the original insertion process you can remove an upload, but not once submitted and confirmed by the system.
8. Once you have uploaded documents as attachments, any ad viewer information will be captured by the NYSCR system, and you can download this information "download RFP viewers" link under "manage solicitation submissions".

#### **15. Problems submitting an ad:**

If you get a "run time error" message when submitting, that is usually caused by pasting copied source material into one of the data fields other than the description text box. Do not copy text from Word or an email and paste into a data field (location, contract term, etc.) other than the description text box. You can import electronic "tags" that the system views as a security breach.

If a problem occurs while entering a submission that causes you to return to the start page please do the following:

1. Log the time of the event, browser version and details of the submission you were entering.
2. Contact your IT Department and ask them if any firewall rules were triggered from the IP Address 66.109.33.120 around the time of the occurrence (this is the IP address for the NYSCR server).

3. If you have a continued problem, or if your IT Department needs more information, please send a message through the “contact us” link on the NYS Contract Reporter website: [www.nyscr.org](http://www.nyscr.org)

This problem may be caused by AJAX (Asynchronous JavaScript and XML), a common group of web technologies that some firewalls or security software may perceive as a threat. If your IT Department does see a rule triggered in the firewall logs originating from the IP address mentioned above, work with them to allow an exception to the rule for the NYSCR site.

### **15. Do I need to renew my subscription to the NYSCR?**

No. Ignore the renewal notices – unless you want to pay for “E”Alert service. The NYS Contract Reporter is now free access to view published ads. Agencies and businesses can view and print copies of published ads without a subscription.

All subscribers received our new service: “E”Alert bid notification service, for the balance of their subscription term (plus 6 months free). The renewal reminder is prompting you to renew "E"Alerts, not general access to the NYSCR. Renewal notices are automatically sent from the system, so all subscribers receive these reminders. If you renew your account, you will be renewing the new "E"Alert service.

**All** agency users of the site that were in the agency database on 12/31/09 were automatically enrolled as “registered users” with free access to view published ads. You should see Site Links, along with your Agency Links, in the right hand navigational menu when you log on to the NYSCR as an Agency User. Only one log in, as an agency type user, is needed to access all of your links.

If you don’t see the Site Links along with Agency Links when you log on with your agency access, please contact us to discuss.