Instruction Document for the NYS Vehicle Marketplace: Authorized User (Buyer)

Revised: 2/21/20

* For other information visit the [Authorized User](#) section on the Negometrix help page.

_____

Table of Contents

_____

Definitions

Archived Solicitations: Solicitations that have been archived by OGS NYS Vehicle Marketplace Staff.

Awarding Phase: Is the phase of a Solicitation when Buyers can enter their Purchase Order information (Formerly Form C).

Buyer: Refers to the NYS Vehicle Marketplace Authorized User.

Closed Solicitations: Refers to all the Solicitations that are closed for bidding.

Colleagues: Refers to coworkers that have been added into the system.

Compare/Select: Refers to the screen where the Authorized User can compare the bid offer(s) that they have received.

Evaluation Phase: Is the phase where Buyers can evaluate their results.

Offer Phase: Is the phase where the Supplier can submit their bids.

Offer: Refers to the Supplier's bid submission.

Offers/Applications: Refers to the screen where the Buyer can view the Supplier profile and obtain the Supplier contact information. Also, the Pricing Sheets and Questionnaires that were filled out by the Supplier are located here.

Participants: Refers to the entities that have access to one or more phases of a Solicitation (e.g., Buyers, Suppliers, and OGS)

Preparation Phase: Is the time period in which the OGS NYS Vehicle Marketplace Team is preparing the Solicitation for Publication.

Pricing Sheets: Refers to the table that the Supplier will need to complete in order to submit pricing information for a Solicitation (Formerly Form B).

Question & Answer: Refers to a section of the Solicitation where Buyers and Suppliers can ask and answer questions.

Questionnaires: Refers to the questions that the Suppliers need to answer in order to complete in order to submit a complete response to a Solicitation (Formerly Form B).

Request: Refers to the Vehicle Request Form (Formerly Form A) that the Buyer will fill out and submit for a vehicle.

Schedule: Refers to the schedule that is set for when each phase of the Solicitation will happen.

Solicitation: Refers to the Mini-Bid.

**Supplier:** Refers to the NYS Vehicle Marketplace Contractor (Dealer).

_____

How to Request a Vehicle

1. To request a vehicle the Vehicle Request Form will need to be filled out and submitted.

   Vehicle Request Form

   Welcome to the New York State Vehicle Marketplace

   a. You will be prompted to log into the Negometrix Platform if not already logged on.

2. Once there fill out the form by answering the questions.

   a. The form will not move forward until all of the required fields are filled for that section. Required fields are marked with an Asterisk (*)., Once they are filled out, the **Next** button at the bottom of the screen will be enabled.

   b. Use the **Previous** button on the bottom of the screen to go back to other sections.

   c. <mark>Please Note</mark>: If you cannot see the buttons at the bottom of the screen, and you are unable to scroll further, you may need to adjust the zoom level on the browser being used.

3. At any point during the process you may save your form to go back to it. Click on the green **Save** button in the blue box to the right of the screen that is located above the "Need Assistance?" information.
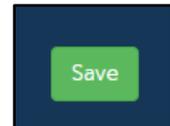
   Save

   a. This will generate a system email that will send a link to the request that is being worked on. A message will appear at the top of the screen after the form has been successfully saved.

   b. <mark>Please Note:</mark> **Once a request has been submitted, you will NOT be able to make any changes to the request, unless requested to by OGS.**

4. **At the end of the form, Final Check** appears and, once clicked, allows the Buyer to check everything before hitting the **Submit** button. To make changes, click on the **Previous** button to go back and make the changes that are necessary. Hit the N**ext** button until the **Final Check** screen appears. Then click the **Submit** button at the top of the screen.

5. Once the form is submitted and has **Successfully Sent** a system email will be sent. Also, there will be a notification will appear at the top of the page that says **Successfully Sent**.

   ✔ Successfully sent.
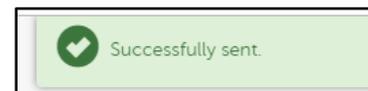
   a. <mark>Please Note:</mark> **Once a request has been submitted. you will NOT be able to make any changes to the request, unless requested by OGS** (see instructions below).

   b. You will receive notification when your request is posted to the system as a Mini-Bid (Solicitation).

      i. **Please Note**: The Solicitation number that you will use when referring to the Solicitation is located in the **No.** column in the **Solicitation** tab when logged on to the platform.

| Flag	No. ▼	Published on	Name
●	1758	-	**(6) Test Cars** (Test/Demo)
●	1755	-	**(2) Midsize Sedans- TEST** (Test/Demo)

_____

Resubmission of a Vehicle Request

1. If corrections are needed to the **Vehicle Request Form** you will receive an email stating that your request has been reopened.
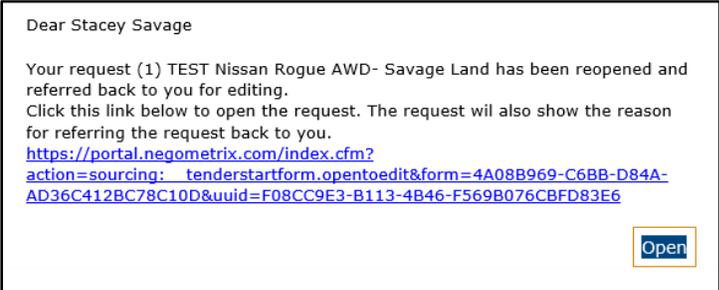
    a. Click on the link in the email and the request form will reopen and allow you to edit the form as requested by OGS.

        i. There will be a pale blue box at the top of the screen that will give you instructions on what needs to be corrected on the form.
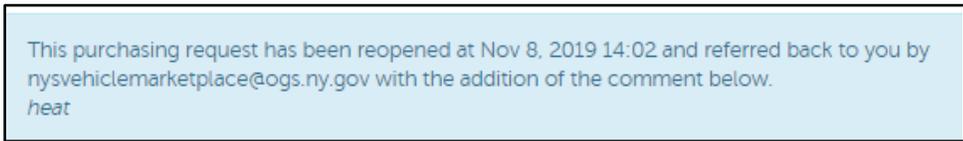
        ii. <mark>**Please Note:**</mark> You will need to change the question that states "Identify what your request is" from "A New Request" to "A Resubmission". You will also need to fill out the "Previous Reference Number(s)". This is located at the top of the right-hand side of the form.
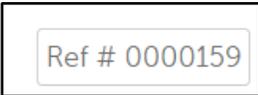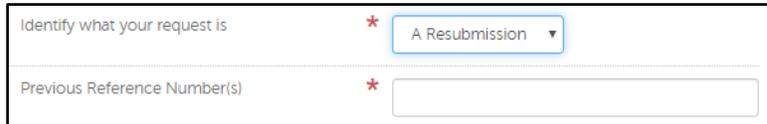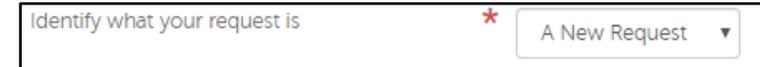
    b. Once everything has been changed, the Vehicle Request Form will need to be resubmitted following the same procedure described above in How to Request a Vehicle.

        i. On the **Final Check** page it will show all the changes that were made on the form and will also show what the previous version was. To view what the change was click on the red **Changed** hyperlink next to the new answer to the question.
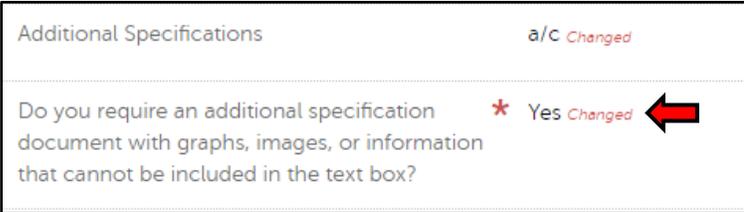
            1. A new window will appear showing what was changed and what version the answer was a part of.

_____
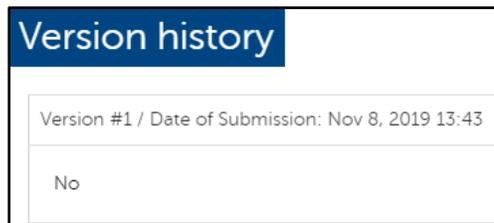
To View Other Solicitations on the Platform

1. To view the results for all of the Solicitations you will need to go to the Public Profile for NYS Office of General Services.

   a. <mark>**Please Note:**</mark> You do not have to be logged into the System to see these.

2. Here you will see all the current Solicitations that are opened and all the ones that are closed, as well as the results of all Solicitations.

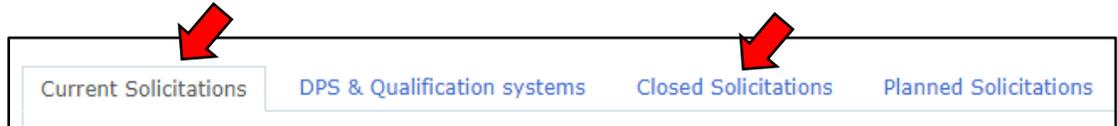 | Current Solicitations | DPS & Qualification systems | Closed Solicitations | Planned Solicitations |
   |---|---|---|---|

   a. If you click on any of the Solicitations listed, you will be able to see all information that has been posted for that Solicitation, including the Specifications and the results when published.

   b. To look at a different one, click on the **Back to Public Buyer Profile** hyperlink at the top left-hand side of the screen. It will bring you back to NYS Office of General Services public page.

   Back to public buyer profile

Solicitation Creation

1. Once the request has been submitted to the OGS NYS Vehicle Marketplace team, OGS will then create the Solicitation and publish it to the platform on your behalf. Once this is done the system will send you an email letting you know it is done and what your Solicitation number is.

   a. The Solicitation will now appear in the **Solicitations** tab.

   b. The number you receive in the email will correspond to the number that is in the number column in the **Solicitation** screen. This is the Solicitation number that is associated with your request. You will need this number when inquiring about that Solicitation.

No. ▼	Published on	Name
1664	-	(2) Chevrolet Equinox LS AWD- Savage World (Test/Demo)

   c. There is a column for **Phase,** this will inform you what phase the Solicitation is in:

   i. **Preparation Phase:** This is where the Solicitation has been created, it is not opened yet to receive bids from the Dealers (Suppliers)

   ii. **Offer Phase:** This is where the Suppliers are bidding on your vehicle(s).

   iii. **Evaluation Phase:** This is where the Buyer would evaluate the offers and talk to the lowest bidder to ensure they meet their specifications.

   iv. **Awarding Phase:** When you have made your purchase decision, you can inform the Supplier in this phase.

_____

Messages

Go to message

1. The system could send an automated email alerting you that you have a **New Message**. This will be in the subject line of the email. Click on the to **Go to message** hyperlink at the bottom of the email.

    a. This will automatically open the message that was received in the platform.

Evaluation of a Solicitation

1. OGS will alert you with a system generated email that the Solicitation is closed and is ready to **Evaluate**. The buyer will be able to review all the offers that came in for their vehicle request.

    a. The email will have a link that goes to the platform to view the results.

        i. You will need to be logged on to the platform and click on the **Compare & Select** tab at the top of your screen. This will bring you to where you can see your offers.

        ii. Make sure that the secondary tab is on the Evaluation tab. This will allow you to see all the offers from the Suppliers.
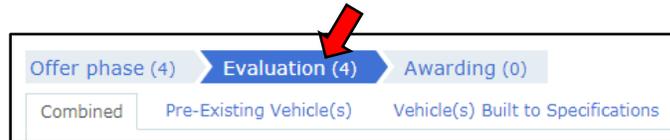
        iii. Depending on what type of request you had determines what your screen will look like. If you did a combined request you will have options to look at all of the offers together, or just the Pre-Existing offers, or just the Built to Specification offers.

            a) The system will automatically rank the offers from lowest to highest price. It will also show you what **Pricing Sheet** the Supplier has used for their offer.

            b) You can view more information about their offer, by viewing the **Questionnaire** they filled out.

                1) To do this you will click on the Supplier's name. It will bring you to another screen which will have the questionnaire that the Supplier filled out. It will also show you what **Pricing Sheets** they have filled out.

                2) This page will allow you to view their responses to the **Questionnaire**, that way you know if there are any deviations or comments that the Supplier has made about their bid.
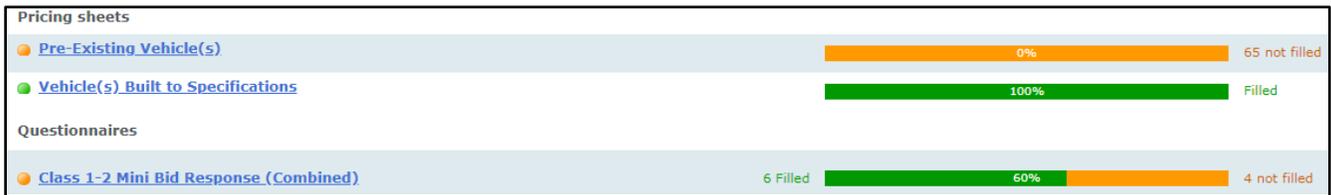
_____

     I. To view this, click on the hyperlink to their **Questionnaire** that they have answered.

🟠 Pre-Existing Vehicle(s)	13 Filled	20%	52 not filled
🟢 Vehicle(s) Built to Specifications		100%	Filled
Questionnaires			
🟢 Class 1-2 Mini Bid Response (Combined)		100%	Filled

     1. A new screen will appear, and it will show you what groups of questions they have answered based on the type of request you made (Built to Specification, Pre-Existing Inventory, or Both- which will consist of both Questionnaires).

6 Filled	60%	4 not filled	
Groups of questions		Number of questions	Answer status
1.1. 🟠 Pre-Existing Inventory Vehicle(s)		4	4 questions not filled
1.2. 🟢 Built to Specifications Vehicle(s)		6	Filled

     2. Click on the hyperlink for the **Questionnaire** you would like to review.

      a. The questions will appear with their answers.

   c) **Please Note:** Not all price sheets and questionnaires may be completed by the bidder. It all depends on the type of offer that was submitted. Ex. The below screenshots show that there were several items not filled out. On *Screenshot 1* the Dealer (Supplier) did not place an offer on a Pre-Existing vehicle and therefore did not fill out any forms related to Pre-Existing vehicles. *Screenshot 2* shows a Dealer (Supplier) who offered both Pre-Existing and Built to Specifications vehicles. The Pre-Existing looks appears to not be fully filled out. However, this isn't the case. They filled out the information for 1 vehicle.

     1) Also, the **Questionnaire** shown will change based on what the request is for.

Pricing sheets			
🟠 Pre-Existing Vehicle(s)		0%	65 not filled
🟢 Vehicle(s) Built to Specifications		100%	Filled
Questionnaires			
🟢 Class 1-2 Mini Bid Response (Combined)	6 Filled	60%	4 not filled

Screenshot 1

|			
🟠 Pre-Existing Vehicle(s)	13 Filled	20%	52 not filled
🟢 Vehicle(s) Built to Specifications		100%	Filled
Questionnaires			
🟢 Class 1-2 Mini Bid Response (Combined)		100%	Filled

Screenshot 2

_____

Tentatively Awarding/Non-Awarding/No Award of a Solicitation

1. Once you have reviewed your Specifications and talked to the Supplier to confirm that the vehicle offered meets your Specifications, you can alert the Supplier about your purchasing decision through a system generated email.

2. To Tentatively award, Non-Award, and/or No Award a Mini-Bid, the offers from the applicable Suppliers will need to be moved to the **Awarding** phase.

   a. You will need to click on your Solicitation.

   b. Then click on the **Compare & Select** tab and then the **Evaluation** tab.

   c. Select as many Suppliers as necessary by placing a checkmark in the box all the way to the right of their name.

      i. Then on the bottom of the screen click on the button that says **Inform** and go to the option **Inform Suppliers**.
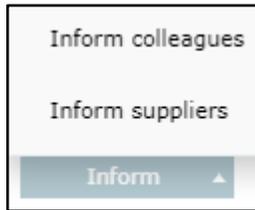
      a) A new window will pop up allowing you to choose which template message you would like to send to the selected Supplier(s).
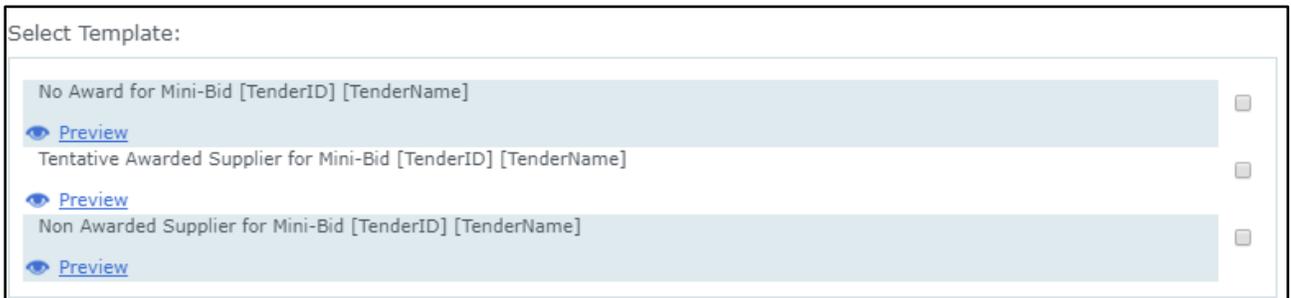
         1) Once a template message is chosen click on the **OK** button at the bottom right-hand side of the window.

         2) This will bring up a new window that allows you to edit and send the message. Click on the blue **Send** button at the bottom right-hand side of the window.

      b) Repeat these steps until all the Suppliers have been notified.

_____

Reporting Results

1. Log onto the Negometrix platform

   a. Click on the Solicitation that needs to have this information inputted.

   b. Then click on the **Compare & Select** tab and then the **Awarding** tab.
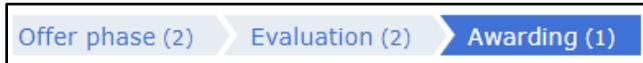
   i. If necessary, adjust the final price that was paid per vehicle, and the quantity purchased, by clicking on the **Edit** hyperlink in the light blue area at the top right-hand side of the screen. You may have to click on "Compare & Select" again in order for the **Edit** features to appear.

      a) Fill in both boxes with the necessary changes. **Please Note:** Both the "Revised Price" and the "Revised Quantity" fields must be completed in order for the revision to calculate properly.

      b) Then click the blue **Save** button in the bottom right-hand side of the screen once done entering in the information.

   ii. To fill in the **Purchase Order**, or other ordering document, information click on the **Edit Purchase Order** hyperlink on right-hand side of the screen.

      a) If no purchase order was issued, click on the **No** option and, in the description, add a note describing why no purchase order was issued. Then click on **Save**.

_____

b) If a purchase order was issued click on the **Yes**, then add the date it was issued. Also, add the PO number, or other internal code that identifies your ordering document. Then click on **Save**.

* Purchase order issued:

◉ Yes ○ No

Issued on:

_____ 📅

Required field

Purchase order number:

_____

Cancel   Save

Archived Solicitations

1. Once the Solicitation has been awarded or not awarded and the **Report of Use** information has been entered, the OGS NYS Vehicle Marketplace team will archive the Solicitation.

   a. To view the archived Solicitations, click on **Solicitations** tab on the right-hand side of the screen.

   b. Then click on the **Archived Solicitations** tab on the left-hand side of the screen.

Current Solicitations   Planned Solicitations   Archived Solicitations

   i. All of the Solicitations that have been archived will automatically move here.

   ii. They will also still be available to view and refer too if necessary.

How to Receive an Export of the Solicitation

1. To have everything that is associated with a Solicitation downloaded, first select the applicable **Solicitation**.

2. Click on the **Compare & Select** tab.

Offers/Applications   Evaluate   Compare & Select

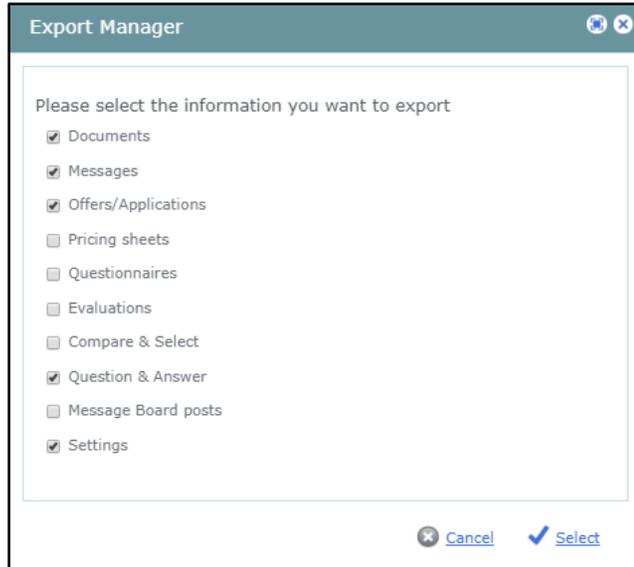3. At the bottom left-hand side of the screen there is a button that says **Exports**, click on that button.
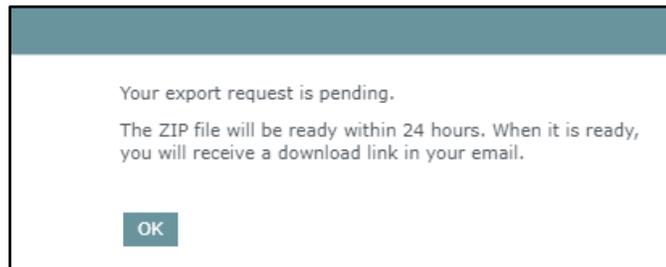
Exports ▲

   a. Options will appear.

      i. To receive everything that is associated with your Solicitation, click on the **Request a zip-export for this solicitation** option.

📊 Export offered pricing sheets of all suppliers

📊 Export Compare & Select

📄 Request a zip-export for this Solicitation

Exports ▲

_____
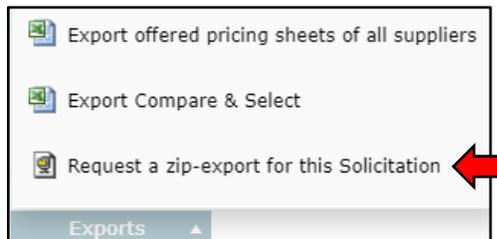
ii. A new window will appear, and it will ask what information you would like. Choose what information you would like and then click the **Select** hyperlink at the bottom right-hand side of the window.

Export Manager

Please select the information you want to export
- ☑ Documents
- ☑ Messages
- ☑ Offers/Applications
- ☐ Pricing sheets
- ☐ Questionnaires
- ☐ Evaluations
- ☐ Compare & Select
- ☑ Question & Answer
- ☐ Message Board posts
- ☑ Settings

⊗ Cancel ✓ Select

a) Another window will appear alerting you that your request is pending and when you will receive a link in your email.

Your export request is pending.

The ZIP file will be ready within 24 hours. When it is ready, you will receive a download link in your email.

OK

b) **Please Note:** This zip file will be ready within 24 hours.

How to Add Colleagues and Set the Necessary Rights

1. Log into your Negometrix account.

2. On the right-hand side of the screen click on the **Company** tab. The default company information and tab group will appear.

   a. Click on the **Colleagues** tab. Once there click on the **Add New** button in the bottom right-hand side of the screen.

   i. A new window will appear where you will enter your Colleagues name and contact information.

   Divisions ▸ Colleagues ▸ Sou

_____

         a)   All fields in this form are <u>mandatory</u>.

      ii.   When you hit the **Save** button the system will generate an email that is sent to your Colleague.

     iii.   <mark>**Please Note:**</mark> Their profile will not be active until they activate their account. They will need to click on the link in the system generated email.

3.   To grant your Colleague rights in the system click on the **Edit** hyperlink to the right of their name.

     a.   Click on the **Security Settings** tab at the top left-hand side of the screen.

     b.   Scroll down to the **Solicitation Level Rights** section and click on the **Edit** button on the right-hand side of the screen.

     c.   In the **Allow All** column to make sure that the following rights are checked:

       i.   Evaluate:

         a)   View "Applications/Offers"

         b)   Show Name of Suppliers

         c)   View Offered Prices

   ii.   Compare & Select:

         a)   Managing Compare & Select, Award Communication and Summary

         b)   View "Compare & Select"

     d.   When finished clicking on the rights click on the save button at the bottom right-hand side of this section.

     e.   Complete these steps for all the Colleagues you are adding.

       i.   To see the other Colleagues, click on the **Profile** tab at the top left-hand side of the screen. This will allow you to see all of the Colleagues you have added.

_____
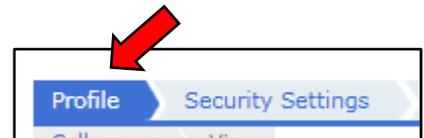
State Agencies

1. In order to request a Purchase Order, the Business Services Center (BSC) requires specific information.
   a. Refer to the *How to Receive and Export of the Solicitation* section.
   b. Always remember to also refer to your procurement guidelines as in what else is needed to obtain a Purchase Order.

2. To receive your State ID from either OGS (light-duty) or DOT (heavy-duty):
   a. Send a screen shot of the **Awarding** screen.
      i. Click on the Solicitation you would like to receive the State ID for. Then click on the **Compare & Select** tab.
      ii. Click on the **Awarding** tab.
      iii. Make sure that all of the *Results* information is filled out. Refer to the *Reporting Results* section if necessary.
      iv. Capturing the screen shot of this screen can be done a couple different ways.
         a) Save a PDF of the screen.
            1) Print the page, but change the printer to *Save as PDF* and click on the save button.
               i. This will ensure all your information is included.
            2) Save the document to your computer. <mark>**Please Note:**</mark> This will need to be resaved anytime you have to make changes for any reason.
         b) Use a snipping tool or other screen capture tool on the computer.
            1) Make sure that when using these tools, the page from the Solicitation name and number all the way to below the Purchase order field is captured in the screen shot.
            2) Save the document to your computer. <mark>**Please Note:**</mark> This will need to be resaved anytime you have to make changes for any reason.
      v. Once everything is gathered that is needed to request the State ID, send the information to the required agency for processing via email.