



Business User's Manual for the New York State Contract Reporter

**NYS' official source of contracting opportunities
Bringing business and government together**

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Contents

Contents

.....	1
Business User’s Manual for the New York State Contract Reporter	3
Introduction	3
Requirements.....	3
How to Sign up For a Business Account.....	3
Twelve month confirmation	4
Site Navigation	4
Site Resources.....	4
Finding Opportunities	5
My Opportunity Profile	5
Searching NYSCR ads.....	5
NYSCR Daily Issues	6
Sharing an ad.....	6
Bookmarking Opportunities.....	6
Receive Update Notifications for an Ad.....	7
Search the Business Registry	7
Events and Bulletins.....	7
Procurement Reports.....	7
NYS Contract Reporter Business Registry	8
Add your Business to the Business Registry	8
Logging into the Business Registry.....	8
Adding Contractor Ads.....	9
Categories /Classifications (Reference)	9
Ad Types (Reference)	11

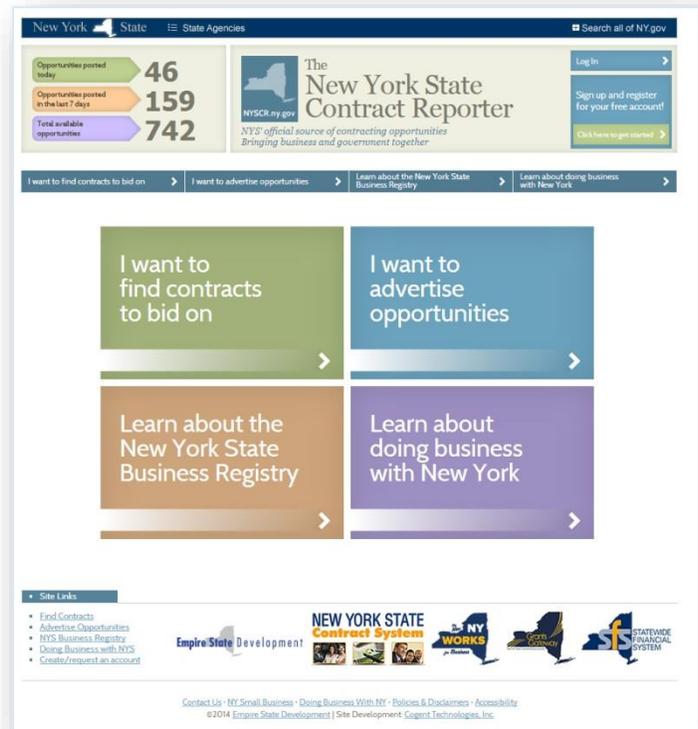


Business User's Manual for the New York State Contract Reporter

Introduction

Welcome to the New York State Contract Reporter, New York's official website of state procurement activity. All state agencies, authorities, state universities and public benefit corporations advertise bid opportunities valued at \$50,000 or more on this website. In addition, many New York municipalities, museums, libraries, and elementary and secondary schools, as well as eligible not-for-profits, advertise bid solicitations on the NYS Contract Reporter.

In addition to bid advertising, the NYS Contract Reporter offers free bid notification service, plus a Business Registry resource that lists companies doing business with New York State. Prime contractors can use the Registry to maximize their connections to subcontractors and suppliers.



NYS Contract Reporter

All NYS Contract Reporter services are free but you must register to access the site's resources and sign up for bid notification messages. You can also complete an expanded registration to add your company to the Business Registry.

Requirements

Anyone can register with the NYS Contract Reporter. All services are free.

The NYS Contract Reporter website has been tested to work with IE 8.0 and above (compatibility view disabled), Firefox, Chrome (latest version), and Safari. Cookies and JavaScript must be enabled. Additional technical requirements can be found in the **FAQs** under **Site Resources** drop menu.

How to Sign up For a Business Account

Navigate to **www.nyscr.ny.gov**. Select **Click here to get started**. Select **Create my account** under **Business Entity Account**. There are four steps to creating an account.

Step 1, Terms of Service: Read, and then if appropriate, agree to the *Terms of Services* by checking the confirmation



A tutorial on **Business User Account Overview** is available in [Tutorials!](#)



box. Select **Next**.

Step 2, Create Login Account: Enter your email Address. Choose a Username and Password. Enter the verification text. Select **Next**.

Step 3, Enter Account Information: Enter your name, contact information, and demographic information. Select **Submit**.

Step 4, Send Activation Code: An activation code will be sent to the email you provided. Select the link provided in that email and enter the provided *Activation Code*.

Once your account has been activated you will be able to log into contract reporter and start searching for bid opportunities. Upon logging into your account for the first time, you should create an opportunity profile, turn on eAlerts to receive daily email notifications of ads matching your profile and, in not already listed, add your business to the business registry.

Twelve month confirmation

All NYS Contract Reporter users must confirm every twelve months that their account information is correct and current. You will be prompted to review your account information 30 days, 7 days, and 1 day prior to your account expiring.

Failing to log in and acknowledge that your account is current beyond the twelve month cycle will place your account into an inactive state. An inactive account will no longer generate email alerts. Inactive accounts may be deleted from the system after a period of time. You will need to [contact the NYS Contract Reporter](#) to re-activate an expired account.

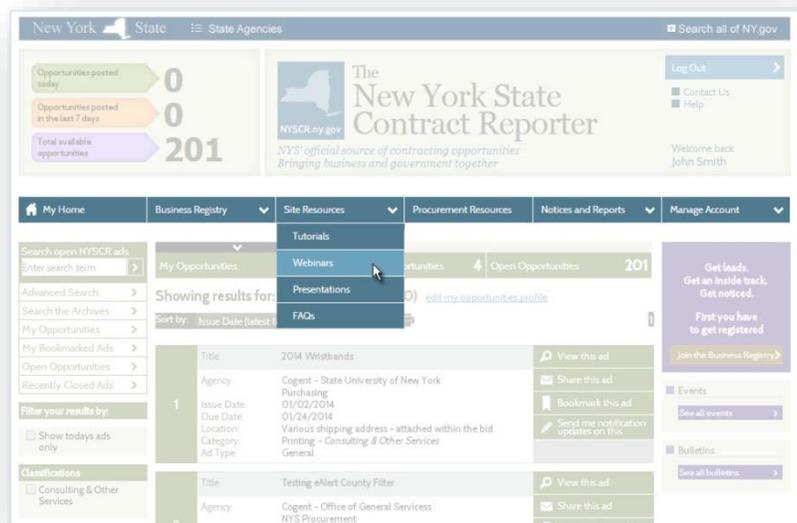
Site Navigation

Once logged in, the main drop menu will be available. All available functions are accessible from the main drop menu. Navigation links to the left and right of the page will change depending on context.

Site Resources

Site Resources are available from the main drop menu. Be sure to check back regularly, as additional content will be added as resources allow.

A number of **Tutorials** are available. These short presentations explain various features and functions of the NYS Contract Reporter.



Main drop menu / Site Resources drop menu



A collection of **Webinars** are posted providing an overview of the various features and functions of the NYS Contract Reporter.

A collection of **Presentations** are posted providing an overview of the various features and functions of the NYS Contract Reporter website.

The FAQ question lists various Frequently Asked Questions.

Finding Opportunities

The NYS Contract Reporter provides a robust set of tools for finding the right opportunities for your business.

My Opportunity Profile

Upon obtaining your account the first task you should accomplish is to define your *Opportunity profile*. The sections of your profile include:

Categories: Select up to 16 categories/classifications in which you are interested. A listing of current (as of publication of this document) categories/classifications can be found at the [end of this manual](#).

Counties: Select either state wide or those individual counties for which you would like to receive ads.

Ad Types: Select the type of ads that would interest you. A listing of current (as of publication of this document) ad types along with definitions can be found at the [end of this manual](#).

eAlert Notification: Select *Yes* to receive eAlert notifications. If enabled, You will receive a daily email listing all new ads posted to the NYS Contract Reporter that match the criteria you set up in in the previous three sections.

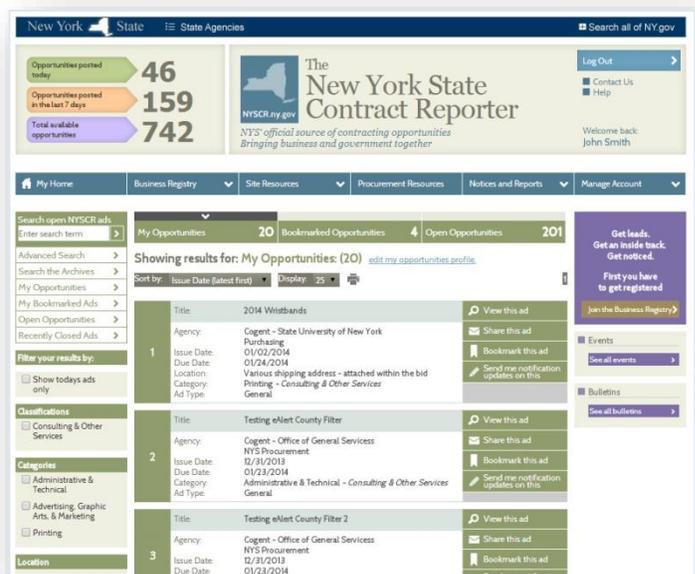
These settings can be changed at any time from the Main Drop Menu. Select **My Opportunity Profile** from the **Manage Account** drop menu. Make your changes and then select **Update My Profile**.

To ensure you receive all future NYS Contractor messages, you should adjust your security settings and add www.nyscr.ny.gov as a *Trusted Site*. You may need to have your IT staff assist you.

Searching NYSCR ads

Successfully logging into the NYS Contract Reporter brings you to the *My Home* page. A Business User's *My Home* defaults to the search results based on your *opportunity profile*. Your search options are listed below:

Search open NYSCR ads: Enter a keyword into the search field located on the top left. Select





the search button or hit enter. Keyword searches are performed within ad titles, descriptions and contract numbers.

Advanced Search: Selecting this displays the *Advanced Search, Open Ads* options in the center of the page. You can refine your results by *Search Term, Agency, Classification, Categories, County, Ad Type,* and *MBE/WBE/DBE Contracting* goals.

Search the Archives: This allows for searching archived ads only. It has the same utility as the *Advanced Search* option, but adds a date range filter.

My Opportunities: Displays search results based on your opportunity profile. This is the same as selecting **My Home** from the top menu.

My Bookmarked Ads: Displays the ads you have bookmarked. How to bookmark ads is described later in this document.

Open Opportunities: Displays all open ads, without any filter constraints.

Recently Closed Ads: Displays all closed ads, listing the most recently closed first.

Quick Filters: Additional filters are available on the left side. Selecting checkboxes will constrain your results to those items selected. Filters available include: *Show todays ads only, Classifications, Categories, Location, and Ad Type.*

NYSCR Daily Issues

The *NYSCR Daily Issues* is a pdf document published once a day. It contains a listing of all ads published on the day of issue. The *NYSCR Daily Issues* for the last three weeks are available on the right side when using the search utilities. Simply select a specific day and your browser can display or download the document.

Sharing an ad

To share an ad with another person select **Share this ad** to the right of an ad listing. This opens the *Share this ad* dialog. You can either copy the provided link and email it to another person using your own email software or fill out a form and have the NYS Contract Reporter send an email with a link to the ad.

1	Title:	Water Supply Study at the NYS Facility	View this ad
	Agency:	Cogent Public Authority	Share this ad
	Issue Date:	12/12/2013	Bookmark this ad
	Due Date:	01/24/2014	Send me notification updates on this
	Location:	1 Main Rd.	
	Category:	Architectural, Engineering & Surveying - Consulting & Other Services	
Ad Type:	General		

Sample Ad

Bookmarking Opportunities

Bookmark an ad by selecting the **Bookmark this ad** located to the right of an ad. Select **Yes** to the bookmark confirmation dialog.



View bookmarked ads by selecting **My Bookmarked Ads** located on the left side of the Search Screen. Remove ads from you bookmark list by selecting **Remove bookmark**, and selecting **Yes** to the confirmation dialog.

Receive Update Notifications for an Ad

Add an ad to your notification list by selecting the **Send me notification updates on this** located to the right of an ad listing. Select **Yes** to the confirmation dialog. You will now receive an email notification when content or the status of this ad changes.

To view a listing of ads you have selected for notification, select **My Ad Notifications** from the **Manage Account** drop menu. Ads can be removed from this list by selecting **Remove update notification for this ad** located to the right of each ad and then selecting **Yes** to the confirmation dialog.

Search the Business Registry

Select **Search the Registry** from the **Business Registry** drop menu. The default listing applies no filter restrictions, resulting in all business to be listed. Search filter options include:

Search term: Enter text to search company name and bio.

Classifications Filter: Select any combination of Commodities, Consulting & Other Services, Construction Professional Services, or Construction.

Categories Filter: Select any combination of NYSCR Categories.

County Filter: Utilizing our interactive map, choose which counties you prefer.

2012 North American Industry Classification System (NAICS) Codes: Using the NAICS search utility, select the code numbers you want included.

Construction Specifications Institute (CSI) Codes: Using the CSI search utility, select the Division you want to include.

MBE/WBE/DBE Filter: Select to include business that help fulfill Minority, Women and Disadvantage goals.

Events and Bulletins

Events and Bulletins posted by government entities are listed on the right side throughout much of the site. Events and Bulletins can also be view by selecting **Events** or **Bulletins** from the **Notices and Reports** drop menu.

Procurement Reports

State Agencies, SUNY & CUNY Campuses, NYS Public Authorities and Benefit Corporations are required to submit reports of projected procurements on a quarterly and semi-annual basis. These reports



contain forecast procurements between \$5,000 and \$50,000 quarterly and over \$200,000 semi-annually classified by NYS Contract Reporter contracting categories.

Projected Procurement Reports can be accessed by selecting **Procurement Reports** from the **Notices and Reports** drop menu. Reports are divided into Quarterly and Semiannual, sorted by date. Selecting a date range displays *Projected Procurement Report* for that date range.

NYS Contract Reporter Business Registry

The Business Registry is a listing of businesses seeking government contracts in New York. Agencies use this listing when seeking providers. Businesses also use this as a resource when developing relationships between companies and when seeking subcontracts on government projects.

The Business Registry account is a company account, rather than an individual account. All users from a company will use the same username and password to access this account. The Business Registry account holder is responsible for determining who has access to the account. A NYS Contract Reporter business account is required in order to access a Business Registry account.

Add your Business to the Business Registry

Select **Join the Registry** from **Business Registry** drop menu.

The registration process begins with an introduction to the Business Registry. It also reviews the requirements for registering your business. Read this section carefully before starting. Make sure that:



A tutorial on **How to place my company in the NYS Business Registry** is available in [Tutorials!](#)

- You are authorized to register your company with the NYS Business Registry
- Your company is eligible to do business with NYS agencies
- You have your company's DUNS number
- You have your company's NAICS codes
- If applicable, you have your company's CSI codes

The rest of the process you will request information describing your company. Supply as much information as you can. Your company profile will help agencies and other business find your company. This listing is a first impression of your business, so be sure your company profile is accurate and error free. To help others find your business, be sure to include important key words in your company description. Update your company profile when circumstances in your company change.

Logging into the Business Registry

Select **Login to the Business Registry** from the **Business Registry** drop menu. Supply your company's username and password. Select **Login**. Your company Dashboard will be displayed, showing current company ads.



Adding Contractor Ads

Companies listed in the Business Registry can place ads to subcontract portions of government contracts. From the Company Dashboard select **Enter new ad**. This starts the 8 step process to placing a new ad.



A tutorial on **How to place a contractor ad** is available in [Tutorials!](#)

Along with basic information and a description of your opportunity, you will need either the CR Number from the ad associated with this contract, or the agency contact information that will be used to confirm that this opportunity is from a government contract.

Ads are saved once started, and do not need to be completed in one session. Incomplete ads are accessible from the company Dash by selecting **Incomplete Ads**.

Once submitted, your ad may take up to 5 business days to approve. An email will be sent to you notifying you of the status of your ad. Once approved, the ad will be published the next business day.

Ads pending approval can be further edited. Once published, an ad cannot be changed.

Categories /Classifications (Reference)

Below is the current listing of Categories / Classifications utilized in the NYS Contract Reporter.

Category / Classification	Description	Commodities /Equipment	Consulting and other Services	Construction Professional Services	Construction
Administrative & Technical	General Consulting, training, research, evaluation, temporary labor (not IT or medical temp staff), translation, hearing reporting, insurance	X	X		
Agriculture, Forestry, Gardening, Landscaping, lawn maintenance and Snow Removal	Animal feed, farming, plants, tree trimming or removal, sod or lawn placement or maintenance, plowing, shoveling or snow blowing services or equipment	X	X		
Advertising, Graphic Arts, & Marketing	Direct media buying, sponsorships, graphic arts (also see photography & videography)	X	X		
Apparel, Textile & Leather	Clothing, fabric, notions, drapery, upholstery, re-upholstery	X	X		
Architectural, Engineering & Surveying	Architectural, Engineering & Surveying services or equipment	X	X	X	
Construction, Horizontal – Highways & Roadways; maintenance, repair & new construction	Highway, roadway, bridges, construction & maintenance, repair & materials: paving, striping, curbing aggregate, pipe, culvert, concrete, parking lots, paving and sidewalks	X	X	X	X



Category / Classification	Description	Commodities /Equipment	Consulting and other Services	Construction Professional Services	Construction
Construction, Vertical – Building construction; rehabilitation & new construction	Building Construction, rehabilitation, & major system rebuilds, including construction, demolition, major repair or replacement of structures and structural systems: HVAC, electrical, roofing, elevators, (For routine repair and maintenance use Facilities- Repair & Maintenance	X	X	X	X
Educational & Recreational	Educational related supplies and consulting, training, assessment, curriculum, research, recreational, and educational equipment and supplies	X	X		
Environmental	Environmental testing, air quality, brownfields, environmental remediation, lead, asbestos or other testing, asbestos removal	X	X	X	X
Facilities, Maintenance, Repair & Building Operations	General facility maintenance: pest control, janitorial, painting, small repairs, lighting, and rubbish removal	X	X	X	X
Financial	Includes: banking, bank card services, leasing, accounting, collection and auditing service	X	X		
Food, Beverages, Commissary, Vending	Bulk food, grocery, commissary, sundries, related equipment and vending machines	X	X		
Freight, Moving & Warehousing	Hauling, moving, long & short term storage, relocation	X	X		
Fuels & Lubricants	Heating oil, gasoline, gasohol, bulk delivery, fleet purchasing cards	X	X		
Information Technology	Software, hardware, IT services, training, IT security, peripherals, AV equipment, IT consulting, storage, cloud computing, hosting services, web design, project management, security systems (also see Telecommunications)	X	X	X	X
Legal & Investigative Services	Legal, investigative, fraud detection	X	X		
Medical/Laboratory Equipment	Laboratory equipment, scientific equipment, medical equipment	X	X		
Medical/Health Care	Medical supplies, health services, prescription drugs, pharmaceuticals, OTC drugs, vitamins, vaccines, hospital services, claims processing, Physician/Nursing/health care services, health care consulting, laboratory services	X	X		
Miscellaneous	Not otherwise classified	X	X	X	X
Office Furniture, Supplies & Equipment	Paper, toner, standard Office supplies, photocopiers, printers, fax machines, maintenance	X	x		
Photography & Video	Photography, video production, training films, microfilm & microfiche (also see Advertising, Graphic Arts, & Marketing)	X	X		
Printing	Business forms, cards, envelopes, letterhead, copy services, distribution, mailing	X	X		



Category / Classification	Description	Commodities /Equipment	Consulting and other Services	Construction Professional Services	Construction
Real Property, Office, Hotel, Conferences/Meeting Space	Broker services, office leasing, conference		X		
Safety & Security	Security guards, first responder supplies and equipment, security systems, police & fire equipment	X	X		
Telecommunications	Telephone communications, radio communications, cellular, pagers (also see Information Technology)	X	X		
Transportation, Bus, Rail, Marine & Aviation	Mass or specialized transportation related construction, consulting, supplies & equipment including, buses, aviation, trains, planes, helicopters	X	X	X	X
Utilities	Electricity, natural gas, propane, water, sewage	X	X		
Vehicles & Equipment	Fleet Equipment & Services - Automobiles & trucks, heavy equipment including: dump trucks, plows, truck attachments such as salt spreaders, front end loaders, backhoes, pavers, road graders	X	X		

Ad Types (Reference)

Below is the current listing of Ad types utilized in the NYS Contract Reporter.

Ad Type	Description
General solicitation	General solicitations are for procurements valued at \$50,000 or more that have not been identified as discretionary.
Discretionary procurements less than \$50,000	Agencies are not required to advertise procurements of less than \$50,000. However, the NYSCR permits agencies to advertise these purchases without adhering to general advertising requirements.
Discretionary procurements between \$50,000 and \$200,000	Agencies are required to advertise discretionary procurements between \$50,000 and \$200,000.
Notice of sole/single source or procurement exempt from advertising	Under certain documented circumstances, a state agency may determine that the goods or services needed are available only from a sole vendor or a single vendor among several.
Continuous procurement solicitation	Agencies may have ongoing needs for particular goods and services, and are continually soliciting for those needs.
Requests for information (RFI) and Requests for Comment (RFC)	Agencies seeking information from the vendor community will issue an RFI or RFC to elicit information and/or comments.
Grant or notice of funds availability	Certain agencies and authorities offer grants or other funds to businesses or communities.



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Ad Type	Description
Announcement of surplus property disposal	Certain authorities and municipalities may offer their surplus property through the NYSCR.