New York State eMarketplace

A Guide for Non-Statewide Financial System Users

NEW YORK STATE OF OPPORTUNITY.™

Office of General Services

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1. Getting Started

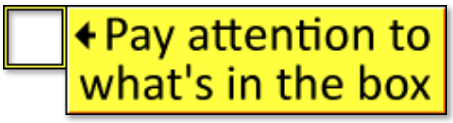
1.1 What is the eMarketplace?

The NYS eMarketplace is an online shopping website administered by the Office of General Services and hosted by Perfect Commerce. It is your gateway to a more efficient, streamlined, and modern purchasing experience. With the ability to accept Purchase Cards (P-Cards) and transmit your purchase orders electronically, the NYS eMarketplace makes purchasing from Preferred Sources and OGS centralized contracts easier than ever before.

1.2 How to Use This Guide

This guide provides information on how to navigate and use the eMarketplace. This guide is designed for authorized users who do not use the Statewide Financial System (SFS) and access the eMarketplace directly through Prefect Commerce. There is a separate user guide for SFS users.

This guide includes screenshots of the eMarketplace with focus indicators like the one shown below. These are added to bring your attention to one or more of the items described in the guide.



1.3 Creating an Account

All authorized users of OGS centralized contracts are eligible to use the NYS eMarketplace. If your organization is already registered as an authorized user of OGS centralized contracts, simply complete the registration form on the Procurement Services website and a NYS eMarketplace account will be configured for you. You will receive your login credentials by the end of the next business day.

If your organization is not yet registered as an authorized user, you must complete an eligibility application to receive an authorized user number. The PDF application can be found online at: http://nyspro.ogs.ny.gov/sites/default/files/EligibilityApplicationForm.pdf.

If you are unsure if your organization is registered as an authorized user, please contact Customer Services at Customer.Services@ogs.ny.gov or (518) 474-6717.

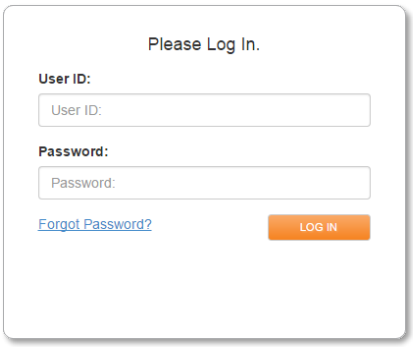
1.4 Disabling Pop-ups

Before logging into the eMarketplace, please make sure to allow pop-up windows in your web browser for this site. You may use the following links for instructions on how to disable pop-ups:

Internet Explorer | Mozilla Firefox | Google Chrome

1.5 Logging in

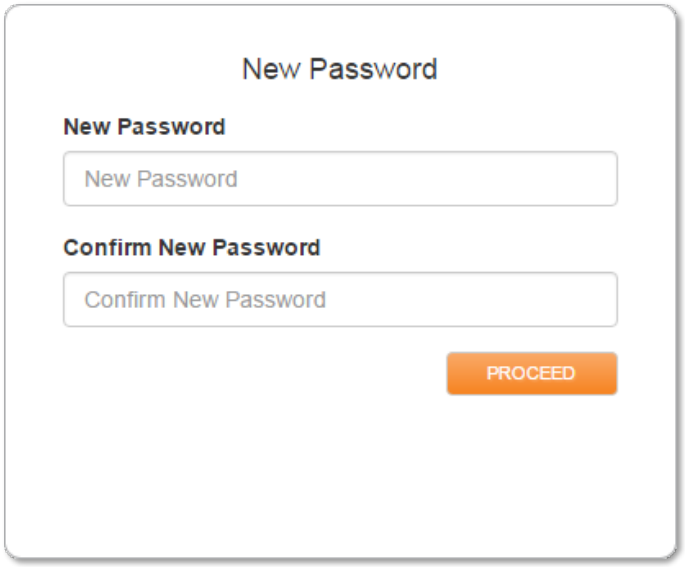
Log into the NYS eMarketplace website at https://secure.perfect.com. Enter your User ID and Password and click the *Log In* Button.



1.6 Resetting Your Password

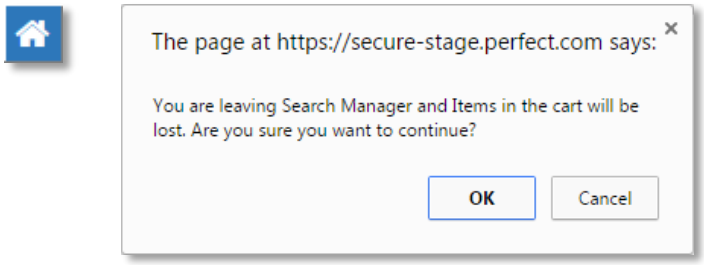
If you forget your password, click the "Forgot Password?" link to reset your password by way of email. Clicking the link will bring you to a page that asks for the User ID and email address that is associated with your account. Enter these two pieces of information, then hit the *Proceed* Button. You will soon receive an email that includes a link to reset your password.

The password reset link will be valid for 24 hours. If you do not click the link within 24 hours, you will need to repeat the password reset process. After you click on the link, it will open a browser window where you can create a new password. You will need to enter your new password twice in order to set it and the click the *Proceed* button.



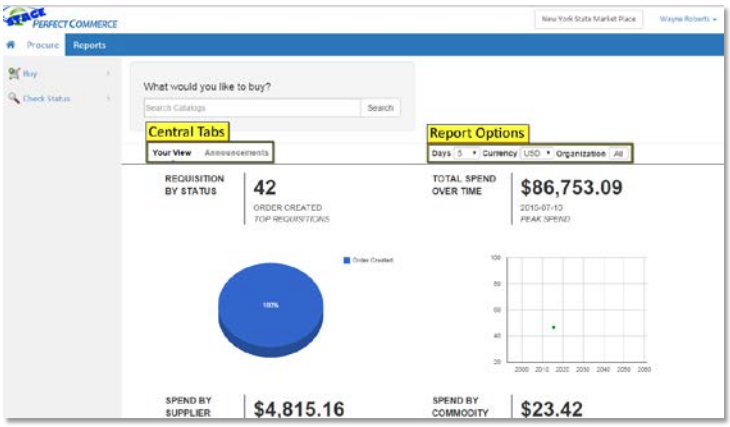
2. NYS eMarketplace Homepage

The NYS eMarketplace homepage is your starting point for the site, immediately offering you summary information and providing links to make new purchases, review existing ones, and generate reports. You can return to this part of the site by clicking the house icon, but you will lose anything in your *Cart* if you do so.



2.1 Activity Overview

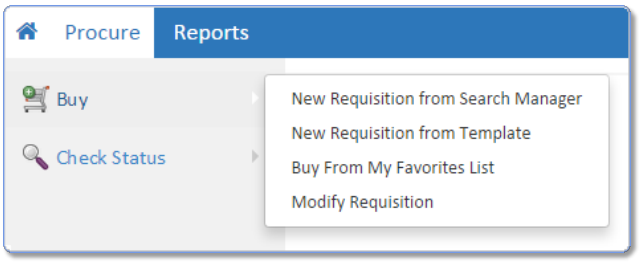
When you first log into the eMarketplace, the *Your View* tab will appear on the homepage, which allows you to see summary and detail information about your purchases. Located in the center of the page are a set of tabs which allow you to choose between the Your View Screen and a screen which shows you recent announcements. Located to the right of the *Central Tabs*, you also have a set of options where you can choose how much information to include in your report.

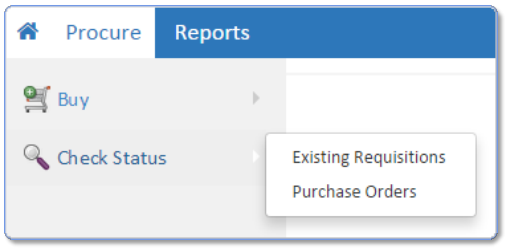


2.2 The Procure Menu

The *Procure* menu appears in the top left of each page of the eMarketplace and allows you to quickly begin a requisition or check the status of previous or current orders. Clicking on it will display two sub-menus: *Buy* and *Check Status*.

The *Buy* menu allows you start a *New Requisition from the Search Manager*, a *New Requisition from a Template*, purchase an item from your *Favorites List*, or *Modify a Requisition* that is currently open. These will be covered in more detail later in the guide.





Below the *Buy* menu, you will find the *Check Status* menu. The *Check Status* menu allows you to check the status of an *Existing Requisition* or of a *Purchase Order*. These will also be covered in more detail later in the guide.

2.3 The Reports Page

Like the *Procure* Menu, the *Reports Menu* also appears in the header at all times. Clicking on the menu will bring you to the *Reports Page*, which allows you to generate various detail and summary reports about your past purchases.

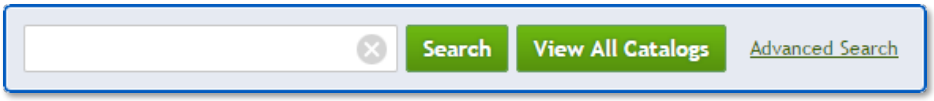
3. <u>The Search Manager</u>

The *Search Manager* is the heart of the eMarketplace site. It displays all of the products that meet your search criteria, as well as basic information about the items, such as the manufacturer, price, lead time, and a short description.

A component of the site that you'll find only in the *Search Manager* and the *Requisitions* sections is the *Requisition Bar* located at the bottom of the page. Completely separate from your *Cart*, this bar lets you know details about your current requisition, such as the name, when it was created, how many items are in it, and the total cost of all those items. The *Requisition Bar* is populated the moment you submit you *Cart* and those items are added to a Requisition.

3.1 Searching and Navigation

To reach the *Search Manager*, click on *New Requisition from Search Manager* within the *Procure* menu, or type your search query directly into the *Search Box*.



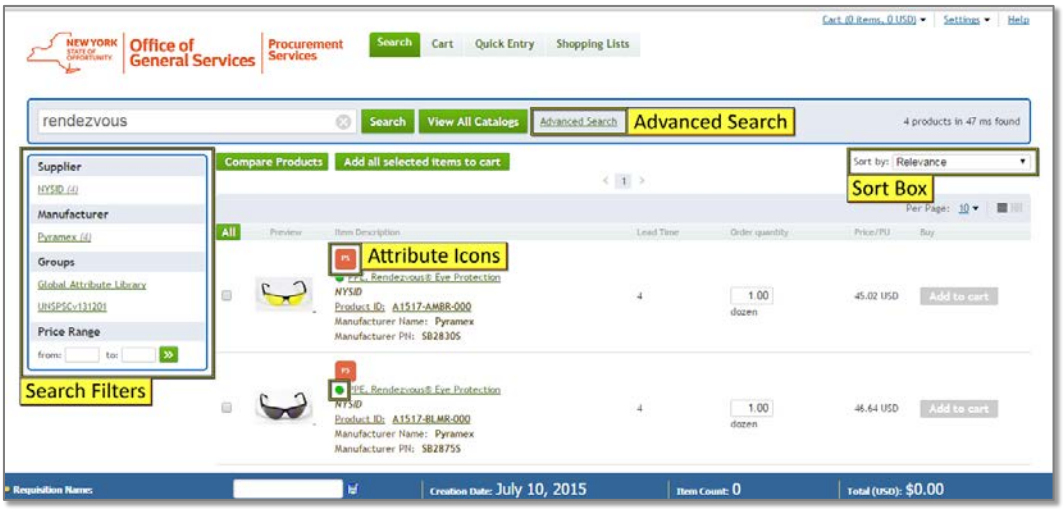
Use the *Search Box* to look up items in a multitude of ways. Know the name of the item you are looking for? The model number? The type of item it is? Just do a search for it.

For example, when searching for a pair of safely glasses, you may choose to type in "glasses", or the manufacturer, the name of the product model, or the manufacturer’s product number. The more specific the information you provide, the more likely you’ll narrow down your results to the exact item you are looking for.

3.2 Search Results

For example, doing a search for "Rendezvous" brings up a list of four pairs of safety glasses in the *Search Manager*. The *Search Manager* also includes a box in the top-right corner to sort your results, as well as a *Filters Pane* off to the left side to narrow down your results to exactly what you are looking for.

Looking at the search results, you will see that each item has various information listed, including an image of the item, the manufacturer, a product identification number and the unit of measure. There are also various *Attribute Icons* associated with each item that will let you know special details, such as whether free shipping is available or if the item comes from a preferred source vendor. Certain items may also include a green dot before the item name, which indicates that it is the leading preferred source provider for that item.



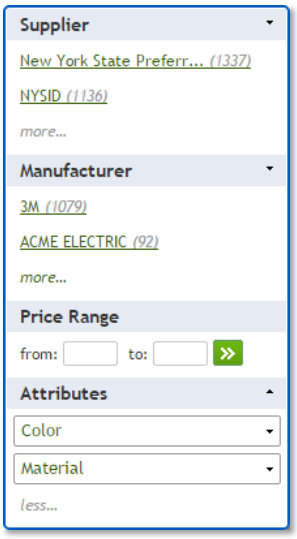
3.2.1 Attribute Icons

The following is a list of all icons you may encounter on products in the NYS eMarketplace. These icons are assigned to the products by the supplier when they submit their catalog.

- Green*
- Recycled**
- Chemical
- Identifying Kit Products
- Free Shipping
- Additional Shipping Info Available
- Shipping (Freight) Charges
- Preferred Source
- Service-Disabled Veteran
- MWBE (Minority/Woman Owned Business Enterprise)
- Biohazard
- Corrosive
- Environmental Danger
- Explosive
- Flammable
- Harmful
- Oxidizing
- Radiation
- Hazmat

* The *Green* icon is used by suppliers to identify and market their products. This icon does not indicate compliance with specifications developed under Executive Order 4.
** The *Recycled* icon is used by suppliers and should be applied to products in compliance with FTC guidelines for environmental claims.

3.3 Filters



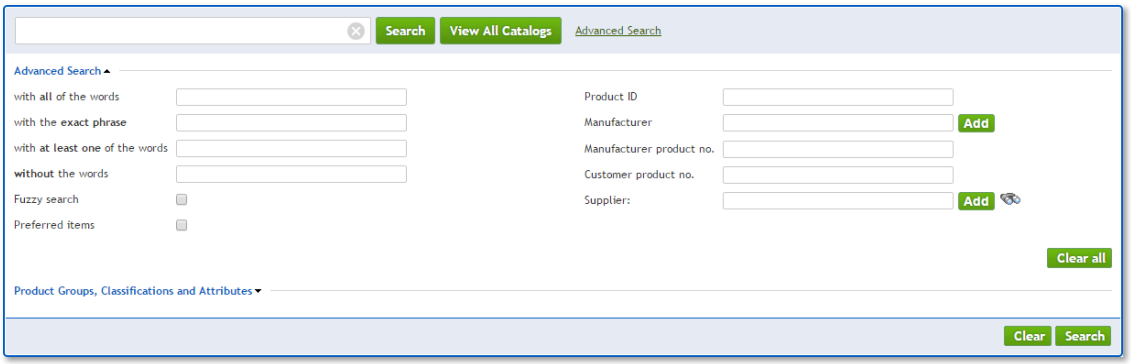
The *Filter Pane*, found on the left side of the page, allows you to narrow your search results by various categories.

For example, you can choose to view items by specific suppliers or manufacturers, within a specific price range, or even containing specific attributes, such as the *Color* or *Material*. Simply click on a link in the *Filter Pane* to narrow your search results.

Some filter categories may contain many selections so click on the *more...* text at the end of the section, or the arrow in the category title, to expand the list and view the additional filters.

3.4 Advanced Searches

The *Advanced Search* option allows you to perform a more specific product search. Clicking on *Advanced Search* will expand the search bar and allow you to use additional fields and controls, such as an exact phrase, excluding words, searching only specific suppliers, or even if the item should be from a Preferred Source. Once you have filled in any information that pertains to your search, click the *Search* button located at the bottom-right corner of your screen and your results will appear in the *Search Manager*.

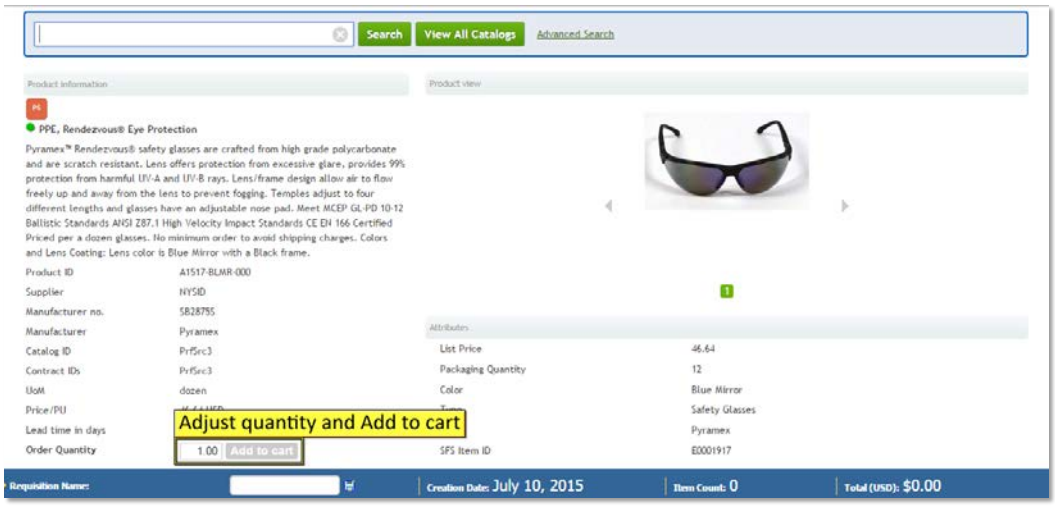


3.5 Product Details

From the *Search Manager,* hover over the thumbnail image or the product title. A message balloon will appear with additional details about the product.

Additional product information is also available in the *Product Details* page. Click either the thumbnail image or the product title to be brought to a page that gives you a better look at the item, a longer description, the attribute icons and various other details.

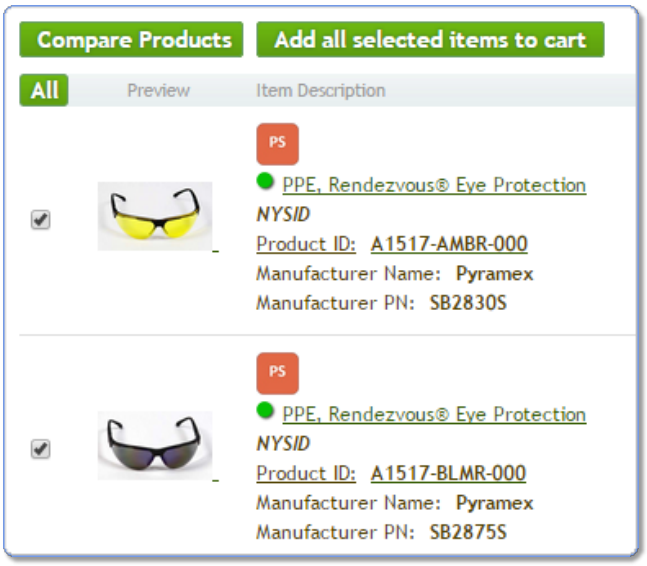
You can also add the item to your cart directly from this page by adjusting the quantity (if need be) and clicking the *Add to cart* button at the bottom of the page.

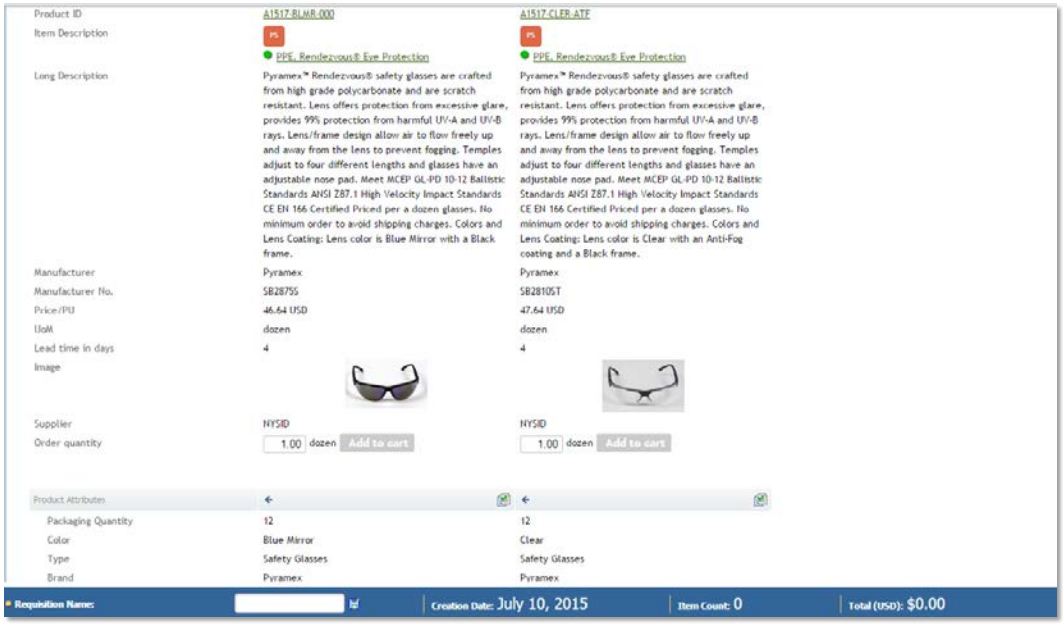


3.6 Comparing Products

The *Compare Products* feature allows users to analyze multiple products in one view. On the *Search Results* screen each item has a checkbox to the left of the thumbnail. Check two or more products and then click the *Compare Products* button.

This will bring up a screen that shows you the details of the products side-by-side. Should you decide to purchase from this screen, the *Quantity* box and *Add to cart* button can be used to move the items into your cart.





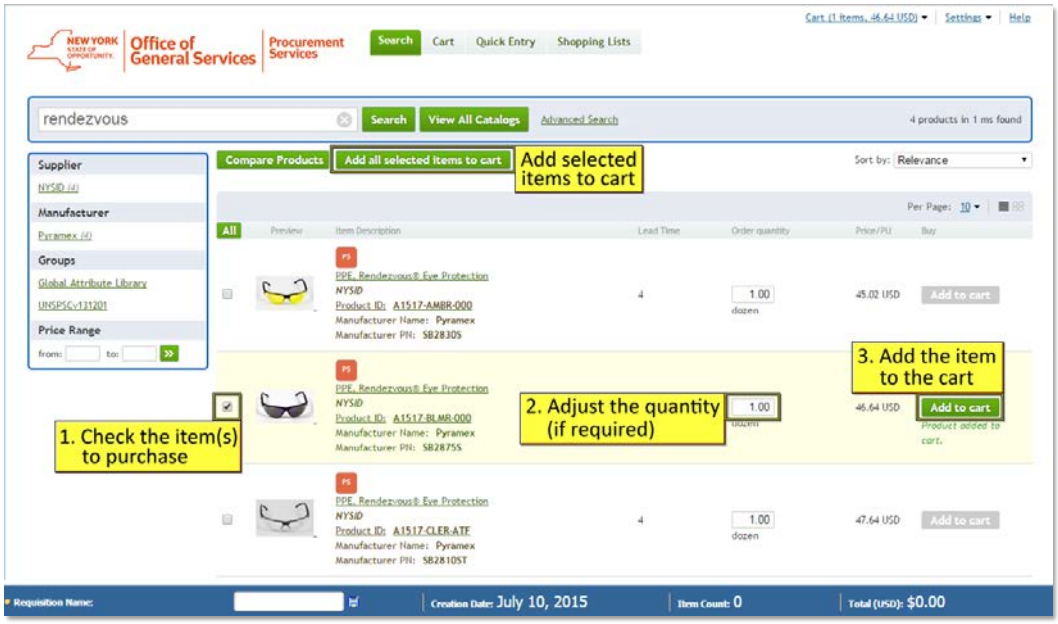
3.7 Adding Items to Cart

Adding an item to your cart can be done no matter where you are on the eMarketplace, even from the *Search Results* screen.

To purchase an item from the *Search Results* page, change the *Quantity* of the item (if you need to) and then click the *Add to cart* button.

If you would like to add multiple items to your cart at the same time (per the picture below), check the box next to each item and hit the *Add all selected items to cart* button. A message will appear to inform you that the item was successfully added to your cart.

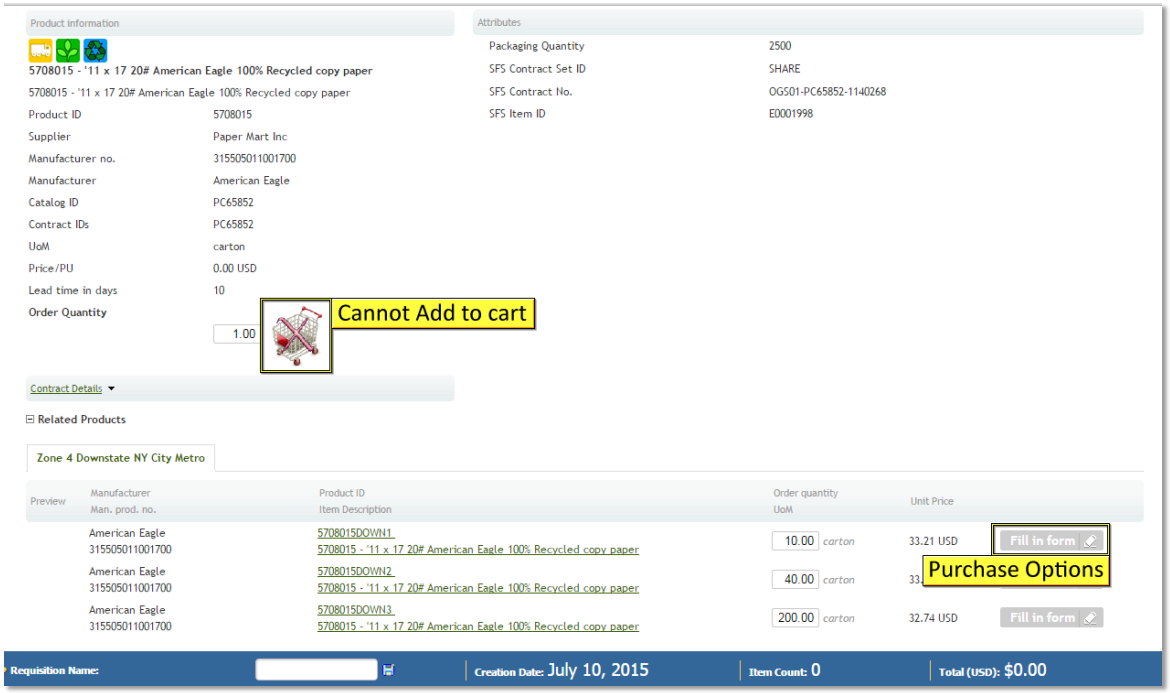
The link to your *Cart* in the top-right corner of the screen will also change to reflect the price of item(s) you just added.



3.7.1 Form Items

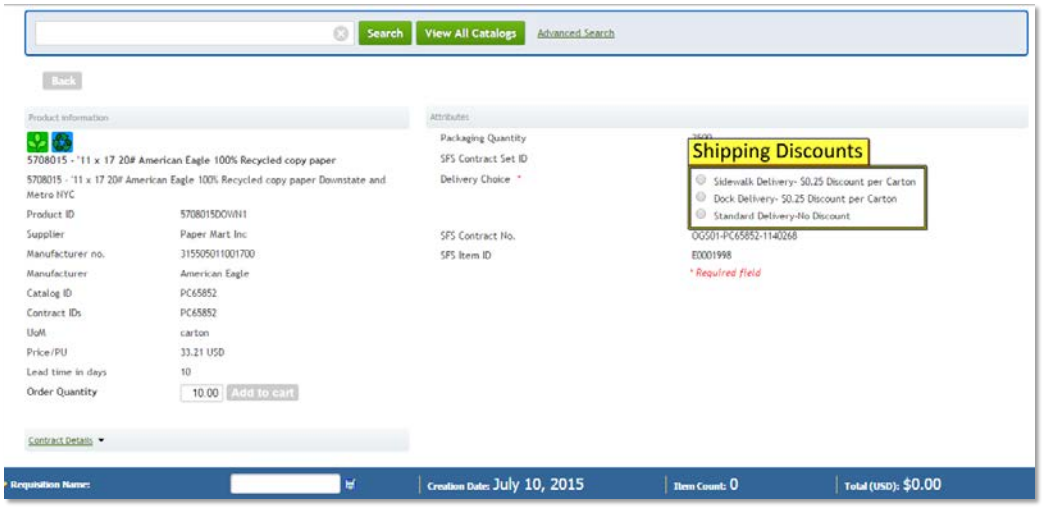
As you search for products, you may notice that some items have different icons where the *Add to cart* button should be. These represent a different process for adding an item to your cart.

A button labeled *Fill in form* or an image of a pair of gears indicate that the buyer must make a selection or customize certain aspects of the product before adding it to their cart. These selections could relate to shipping, zone selection, product customization, or quantity discounts. Clicking on the icon in the *Search Results* page will display the *Product Details* page where those selections can be made.



In the above example of a carton of copy paper, you can see two differences from the *Product Details* page. First, the *Add to cart* button is missing and instead there is a cart icon with a red x indicating that you cannot add the item to the cart yet. The other change is that there is a special tab at the bottom of the page offering different pricing options for not only the zone you are purchasing for, but for the quantity that you are purchasing.

In this instance, the product price depends upon on the delivery location and the quantity of the paper being purchased. Instead of adding the item to the cart from this page, choose the quantity tier from the bottom the page and click the *Fill in Form* button. You will be taken to another version of the *Product Details* page as shown below.

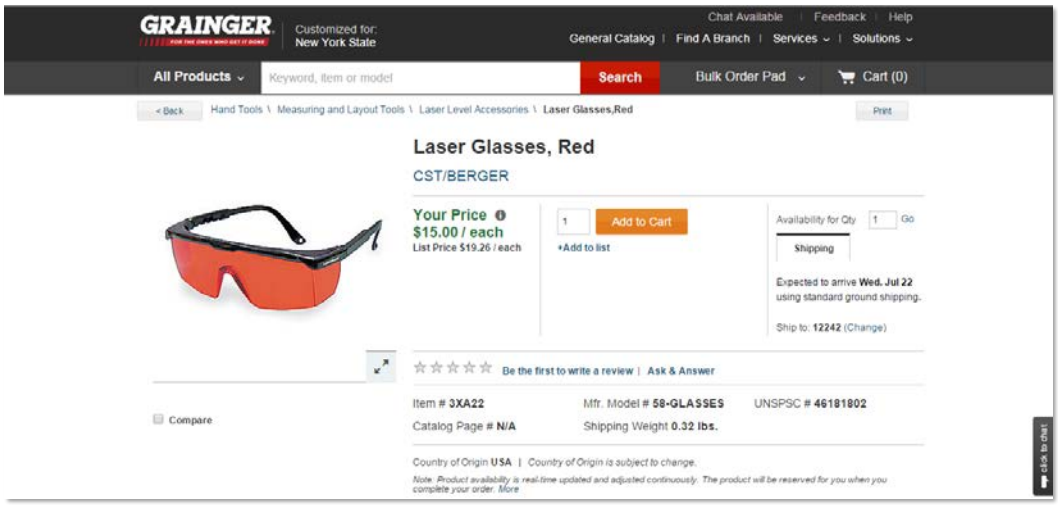


On this page, enter the desired quantity and add the item to the cart. If the product has different shipping options or discounts, they can be selected here. Products that require choices in color or material will also appear on this page.

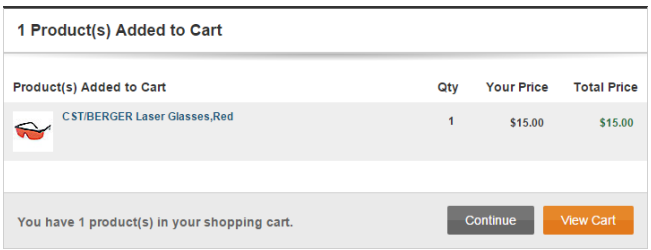
3.7.2 Punchout Items

The globe icon represents *Punchout Items* in the eMarketplace. *Punchout Items* have the product details stored on the supplier's own website. The search results display in the *Search Manager*, but when the item is selected the user is taken to the supplier's website. That redirects the user to the supplier's website in order to add the item to your cart. There the user can add the item to their cart and bring that cart back into Perfect Commerce. Any item that has a globe button is part of a round trip catalog. Only some of the largest and broadest centralized contracts will appear as round trip catalogs.

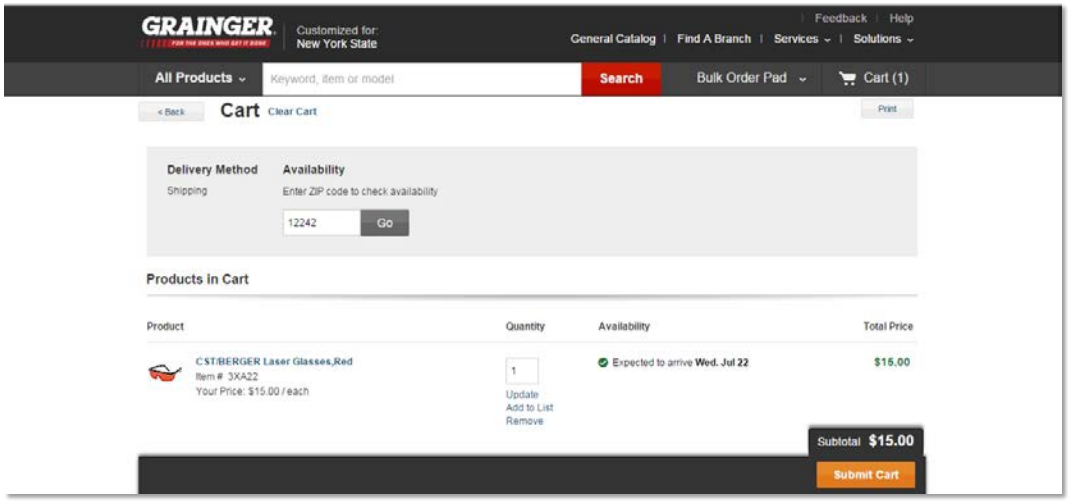
For an example of *Punchout Items*, do a search for "glasses" and then use the filter to narrow the supplier to "WW Grainger." You will see a pair of red laser glasses. Click on the *Punchout Icon* for that item. You will notice that by clicking on the icon, the eMarketplace will send you directly to that item on the WW Grainger website. Here you can view all the details of the item and add it to your cart.



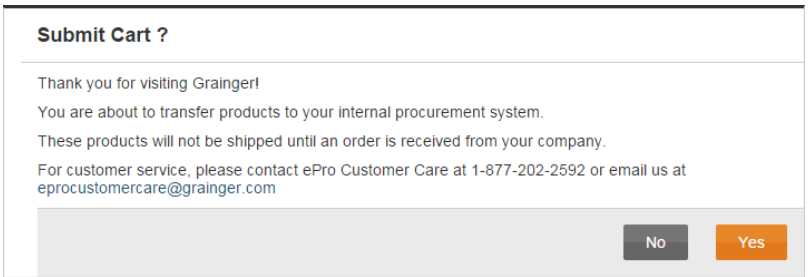
Click the *Add to Cart* button and you'll receive a pop-up window letting you know the item was added.



Click *View Cart* to go to your cart on Grainger's website.



Hit the *Submit Cart* button at the bottom of the screen and another pop-up window will appear letting you know that your item is being sent to your eMarketplace cart. Click the *Yes* button to return to the eMarketplace.

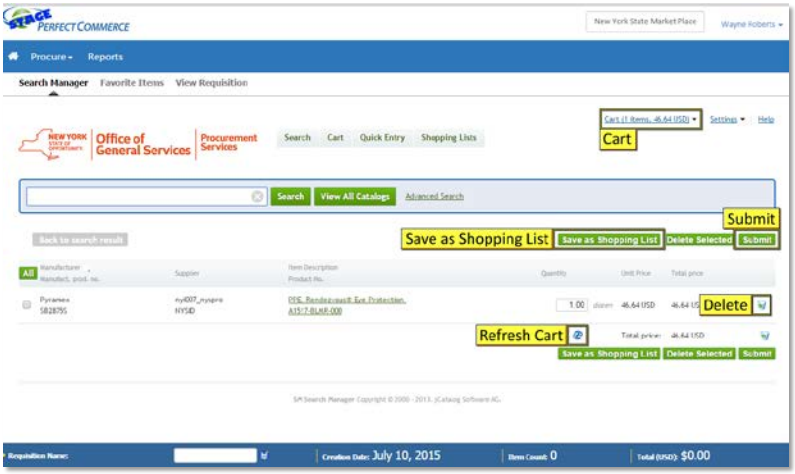


Now you will be automatically re-directed to your *Shopping Cart* in the NYS eMarketplace The *Punchout Item* is now included and will be treated like any other eMarketplace product.

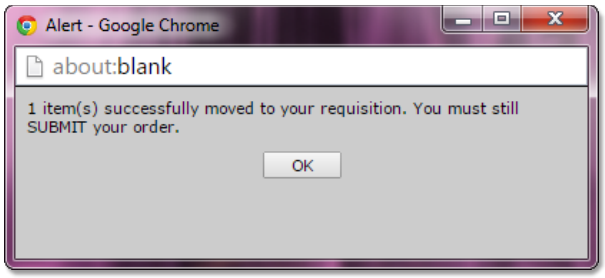
3.8 Your Shopping Cart

To review your Cart, click on the *Cart* link in the top-right. You can update an item's quantity by changing that field and clicking the *Refresh Cart* button. You can also remove any items from your cart by clicking the *Delete* icon at the end of the product line or by placing a checkbox next to multiple items and hitting the *Delete Selected* button.

This is also your opportunity to bookmark any item(s) that you may want to purchase again in the future by putting a checkmark next to them and clicking the *Save as Shopping List* button.

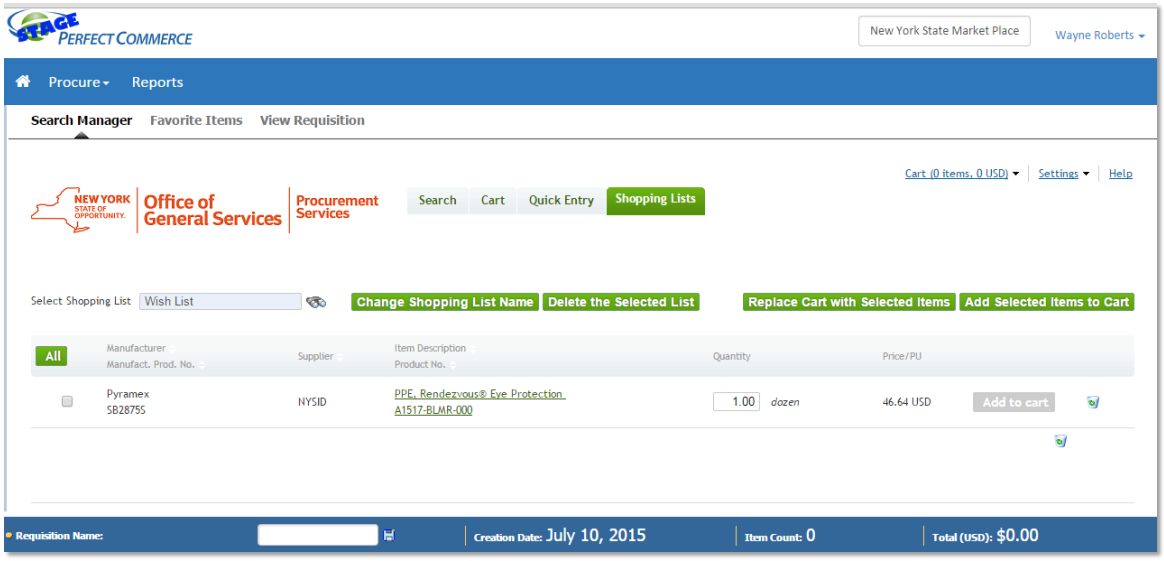


Click the *Submit* button and a window will pop up letting you know that the items in your *Cart* have been transferred to a requisition.

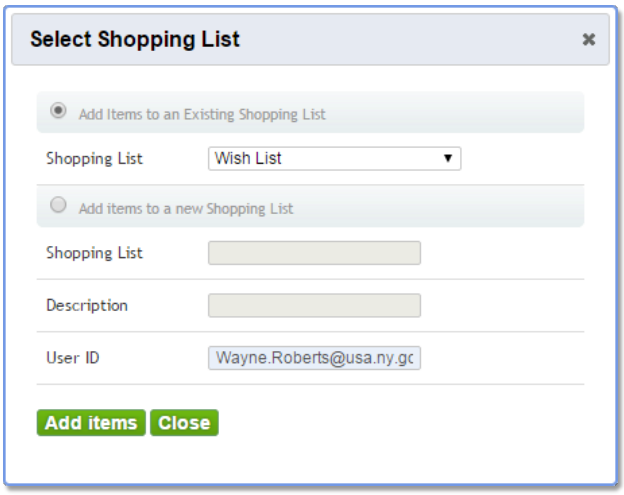


3.9 Shopping Lists

The *Shopping Lists* button can be accessed from the top of every page in the *Search Manager* and it can hold multiple lists that you can use to quickly *Add Selected Items to your Cart* or *Replace your Cart with Selected Items*.



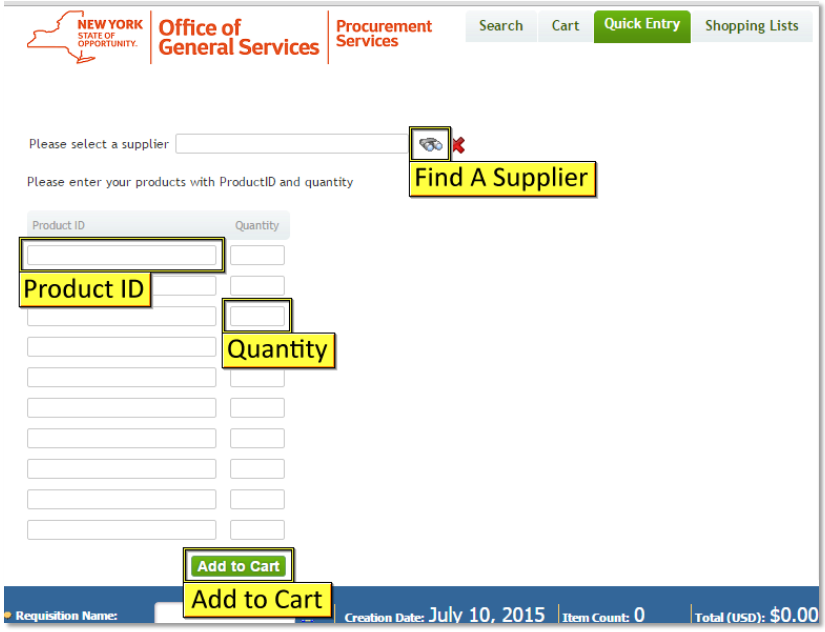
Whenever you add an item to your *Shopping List* from your cart, you are given the option to add to an existing *Shopping List* or create a new list. Once you have created a list, you may change the name of the *Shopping List* or delete the list from within the *Shopping List* page.



3.10 Quick Entry

Sometimes you already know what you want. You have ordered an item so many times that you have memorized the *Product ID* number, you know the supplier, and all you really want to do is add the item to your cart without going through the search process. That's what the *Quick Entry* screen is for.

On this screen, there are fields in which to enter the exact *Product ID* of the item you want and the *Quantity* that you would like to order. You can fill in ten different items at a time and then hit the *Add to Cart* button to automatically add them directly to your cart. In the event that two or more suppliers sell items with the same Product ID, you can hit the binoculars icon to *Find a Supplier* from the vendors list select one before adding the items to your cart.



Search for Suppliers

Supplier ID | Supplier Name

Search | Clear

Please note: All search fields are case insensitive. Use wildcards like '*' and '?' for searching. The asterisk substitutes one or more characters, the question mark substitutes exactly one character. Example: "car*" will find "cartonnage", "caretaker", "carriage" and more; "car?" will find "cart", "carp", "card" and more.

7 items found, displaying all items.

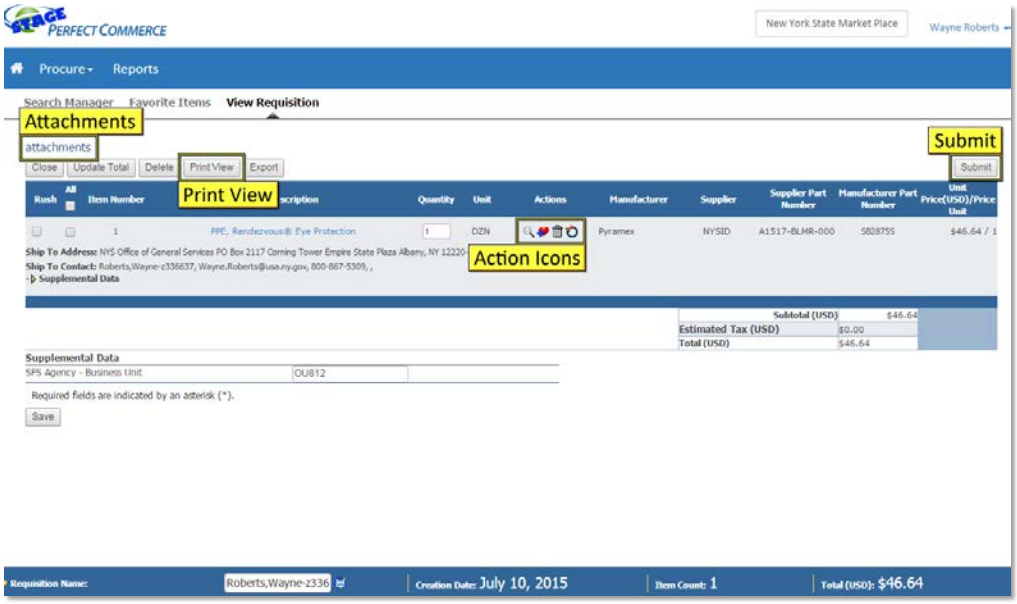
Supplier ID	Supplier Name	Supplier Group Name	City
cor900_nyspro	Corcraft		
lin306_nyspro	Lindenmeyr Munroe		LATHAM
nyi007_nyspro	NYSID		Albany
nys400_nyspro	New York State Preferred Source Program- (Blind an		
pap665_nyspro	Paper Mart Inc		
uni865_nyspro	Unisource Worldwide, Inc		
wwg355	WW Grainger - 3.5 xCBL Integration		Perfect

4. Requisitions and Purchase Orders

The *Requisition* page allows you to review your order and add billing and shipping information prior to turning your request into a purchase order.

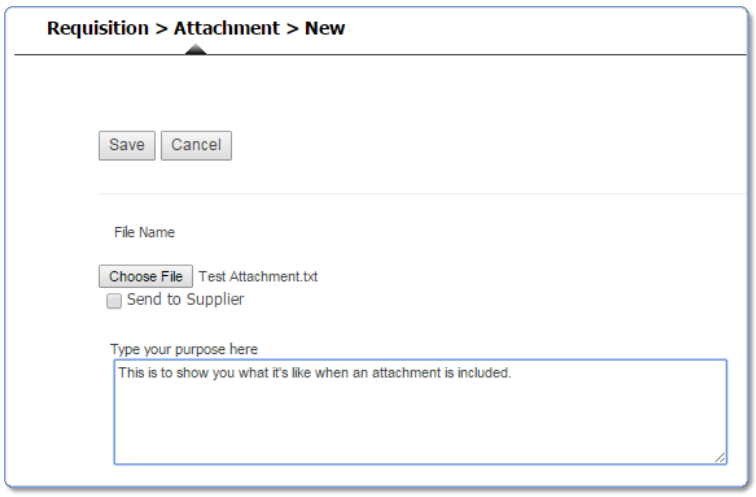
4.1 View Requisition Screen

The *Requisition Screen* is your last stop before submitting your order.



In the top left corner, you will notice a link where you can add any attachments that you may want to include with your requisition. When you click on it, you'll get a screen that tells you that the requisition contains no attachments, and buttons that will allow you to either *Close* the window and go back, *Delete All* attachments, or add a *New* attachment. Attachments added at this stage will not be sent to the supplier.

Clicking on the *New* button will bring up a screen up a screen with a *Choose File* button that you can click to open Windows' File Selection dialog window. From there, simply choose the file you want to attach and then you will return to the previous screen, which shows you the file you chose, plus a box for any comments. Once you are ready, hit the *Save* button to return to the *View Requisitions* page.



Under the *Action* column in the center of the page there are four icons. The most important one at this moment is the *Item Details* icon, so you should go ahead and click that one now.

Item Details: Opens the *Item Details* page for that item

Add to Favorites: Add Item to a list of Favorite products

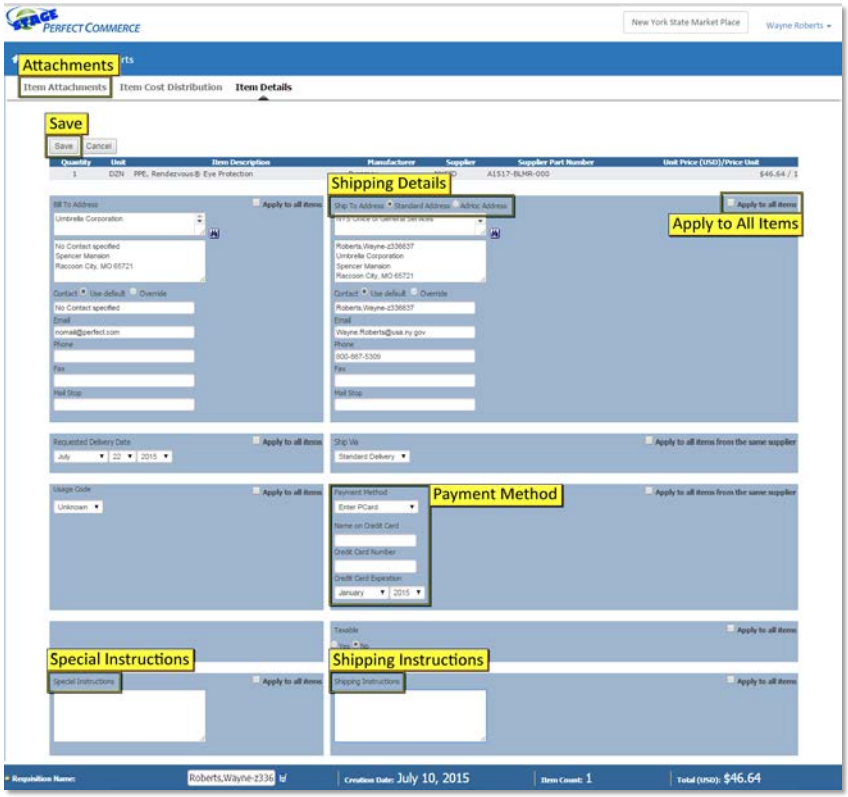
Delete: Removes Item from the requisition.

Edit RoundTrip Item: Brings up a page that shows you more details on that Punchout item.

4.2 Editing Requisitions and Item Details

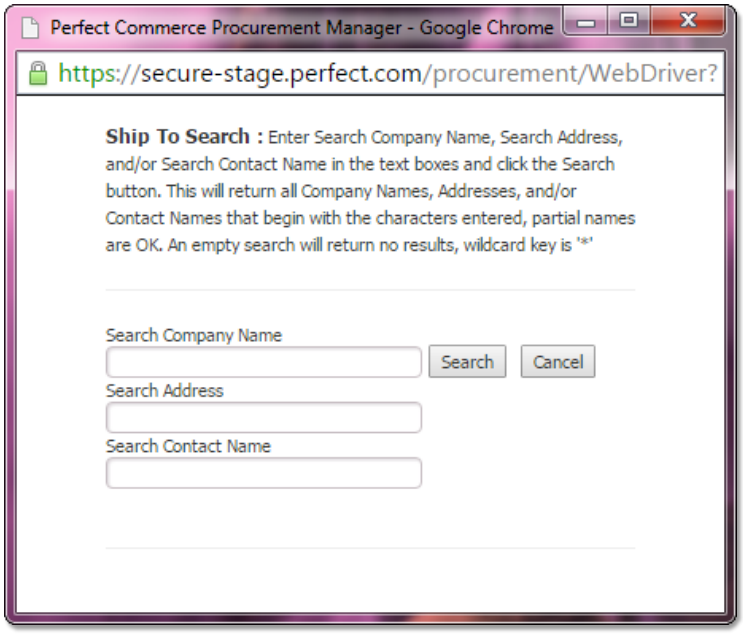
This page is where you will be giving us the information we need to get the item to you. The first thing you should pay attention to is the checkbox in the top-right corner of each section that reads *Apply to all items* or *Apply to all items from the same supplier*. By default, each item in your order will need to be filled out individually. However, if there is any section of the *Item Details* that you want to stay on each item in your order, you only have to check this box in that section.

Looking over the page, you will notice there are sections for both your *Billing* and *Ship-To Address*, *Shipping* and *Payment Method*s, the option to include an attachment specifically for this item that will go to the supplier, and a couple fields towards the bottom where you can indicate any special instructions.

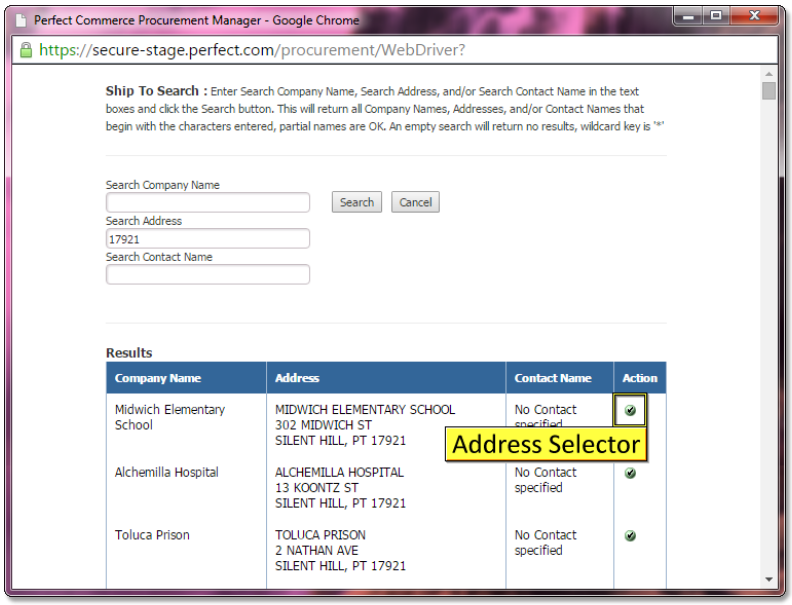


The first thing you want to do on the *Item Details* Screen is to is verify that the addresses are correct, and if you should need to change your *Ship-To Address*, just click the *AdHoc Address* radio button and you will be able to manually enter an address. You can also use the binoculars icon to select an

address from a prefilled list of locations. When you click on the binoculars icon, the following screen will appear.



This screen will allow you to search the addresses based on one or more criteria, either the company name, address or contact name. They do not need to be exact, as partial fields are perfectly acceptable. For this example, I will look up all addresses using just a zip code.



Once you have found the correct address you would like to use, simply click the *Address Selector* icon at the end of the row to select it. Let's go back to the main *Edit Details* page and continue filling it in.

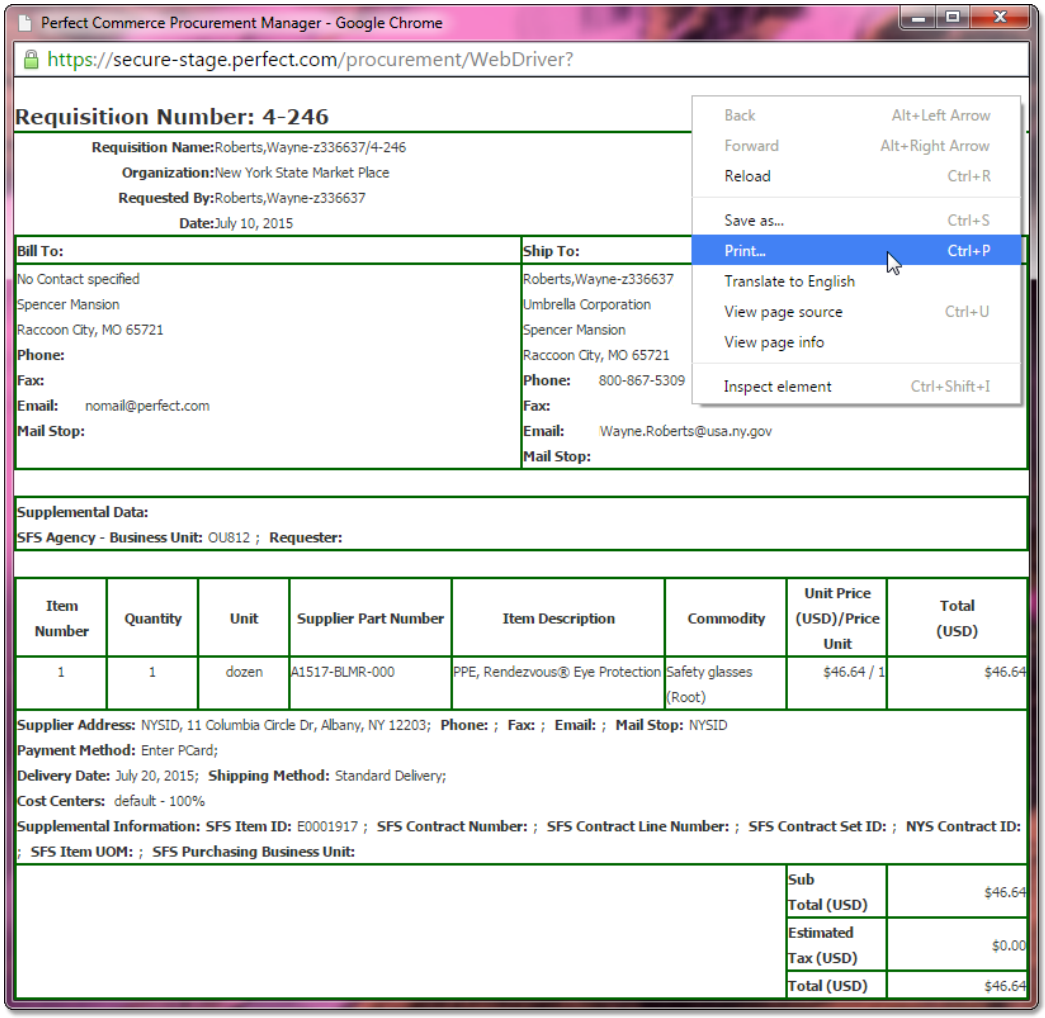
The next thing you need to do before finalizing your order is to input your payment details. Scroll down the *Item Details* page and you will see a section titled *Payment Method*. Certain vendors may allow you to use a *Bill Me Later* option, but in most cases, you will be paying by entering your P-Card

information. Consider checking the *Apply to all items* box so that you only need to fill in this information once per requisition.

Once you are satisfied with all the information, scroll back to the top of the screen and hit the *Save* button and you will return to the *View Requisition* screen.

4.3 Print View

At the top of the *View Requisition* screen there are several buttons, one of which says *Print View*. Click that button to bring up the *Print View* page, which displays the information about your requisition in a separate window. In order to print out the page for your records, simply right-click anywhere on the page and choose *Print...* from the context menu.

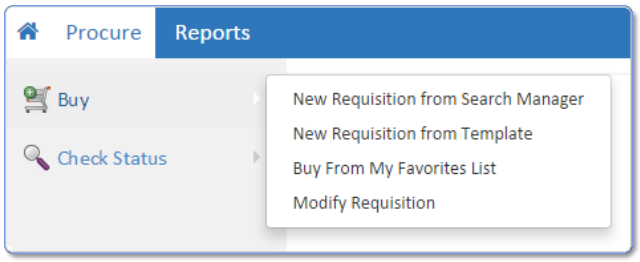


4.4 Submitting the Requisition

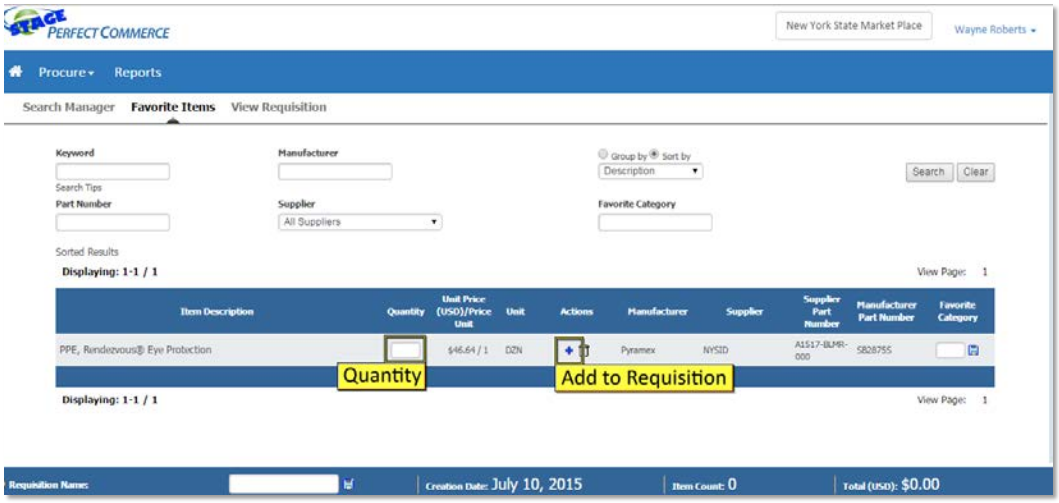
Now that all of your items are accounted for and the billing information is entered, the final step is to just click the *Submit* Button in the top right corner. A pop-up window will appear letting you know that you've successfully placed an order through the NYS eMarketplace. Congratulations!

4.5 Favorites

To access the *Favorites List*, click the *Procure* menu and then navigate down to *Buy*. There will be a submenu that reads *Buy From My Favorites List*. Click on this and it will take you directly to your *Favorites List*.

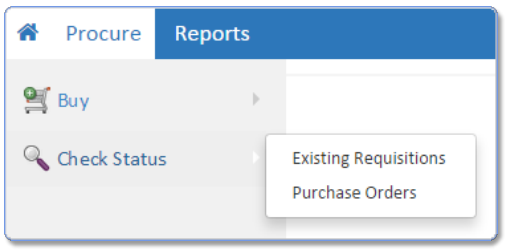


Like the *Shopping List*, the *Favorites List* holds items that you can quickly add to your purchase, however, unlike the *Shopping List*, items will be added to your current requisition rather than your *Cart*. In order to ensure that you are adding the current version of an item available in the eMarketplace, it is preferable to use *Shopping Lists* over *Favorites*.

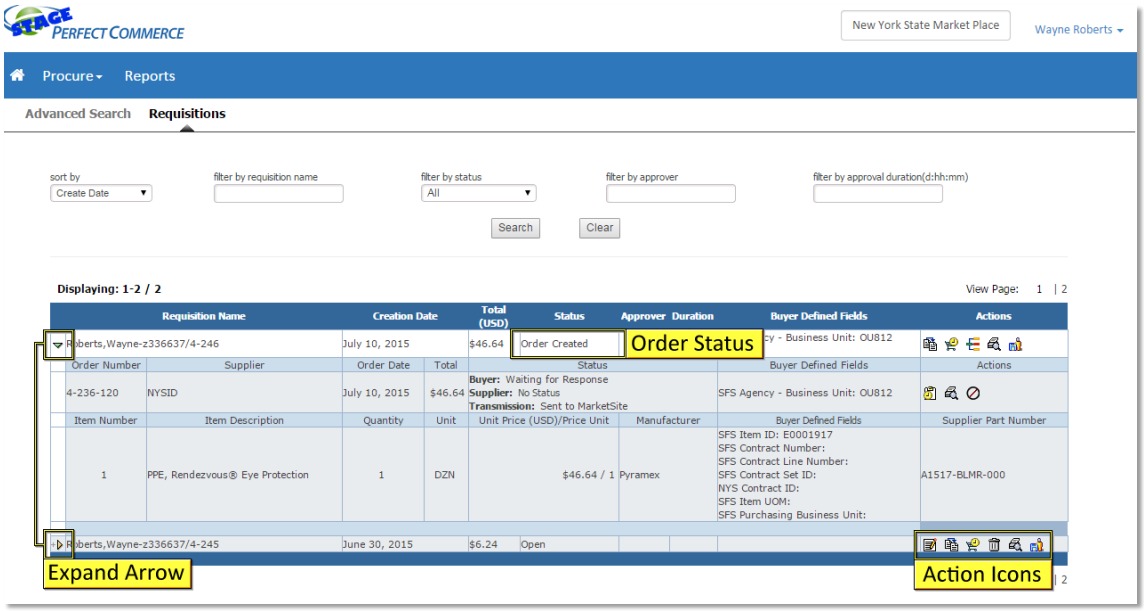


4.6 Checking the Status

Use the *Procure Menu* to navigate to the *Existing Requisition* option. This brings you to a screen that displays the status of your entire requisition history. Any requisitions that have been created and submitted (*Order Created*) or created and not submitted (*Open*) will show up here.



There is an *Expand Arrow* at the beginning of each line that you can click for more information on a particular requisition. There are also sort and filter functions at the top of the screen that allow you to easily find a specific requisition.



4.6.1 Requisition Action Icons

Similar to the *View Requisition* screen, this page also has a series of icons for each requisition on your list. Certain icons are only applicable to requisitions that are in a specific status.

Edit: This icon only appears on *Open* status requisitions and allows you to further edit your requisition for submittal.

Copy to Requisition: Creates a brand new requisition that is the exact duplicate of the one this icon belongs to.

View Requisition History: This will display the history of that particular requisition.

View Approval Map: This will graphically display which step you are on in the process.

Delete: Another icon that only shows up on *Open* requisitions, clicking this will allow you to delete the requisition entirely.

Print View: This will show all the details of the requisition in a format that is suitable for printing (see below.)

Save as Template: This will make a copy of the requisition as a template for future use.

Order History: This shows the historical details of the requisition.

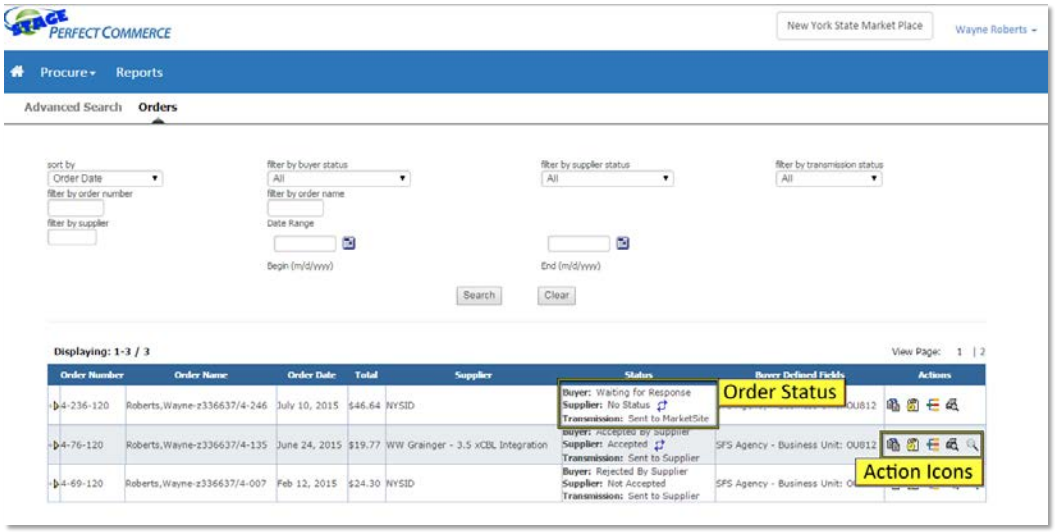
Cancel: Clicking this icon will allow you to cancel an order within an open requisition.

4.7 Purchase Orders

Accessing the list of purchase orders is similar to accessing *Existing Requisitions*. Use the *Procure Menu* to navigate to the purchase orders option. This will bring up the *Purchase Order* screen as shown below. It is similar in appearance and function to the *Existing Requisitions* screen except that it displays each purchase order rather than each requisition.

A requisition has not yet been dispatched to the supplier and may contain items from more than one supplier. A purchase order has been dispatched and contains items for that supplier only. A requisition with items for more than one supplier will be split into one purchase order per supplier.

If you take a look in the *Order Status Box*, you can see the various different statuses that your purchase order can have: *Waiting for Response*, *Accepted by Supplier*, and *Rejected by Supplier*.



4.7.1 Purchase Order Action Icons

This screen also offers a series of *Action Icons*, many of which perform the same as on the *Existing Requisitions* screen.

Copy to Requisition: Creates a brand new requisition using the purchase order that this icon belongs to.

Order History: This shows the historical details of the purchase order.

View Approval Map: This will graphically display which step you are on in the process.

Print View: This will show you all the details of the purchase order in a format that is suitable for printing.

Order Details: This will show you all the details of the purchase order in a slightly different format than the *Print View*.

5. Generating Reports

Another feature of the NYS eMarketplace is the ability to generate reports of your purchases. To generate a report, on the main homepage, to the right of the *Procure* menu you will see a link to the *Reports* page. This will bring you to the *Reports* landing page with a dashboard of summary statistics and a list of your completed and queued reports. Depending on the level of permissions associated with your eMarketplace account, you can generate reports for your own purchasing activity or for that of others in your organization.

On the left side of the screen there is a list of report types: *Standard*, *Spend* and *Admin*. Hover over any of these options and you will see a list of different types of reports that you can generate. Choose any of these and a dialog box appears allowing you to customize different aspects and formats of the report, including your preferred output format. When you complete your selections, click *Run Report* and the system will begin processing the report.

Once the report has been completed, it will appear in the *Completed Reports* list on the *Reports* page. To open the report, click on the row for your completed report. A pop up a dialog box may ask you for a location to download the file. Choose where you would like to save the file, click the *Save* button, and open your report.

6. Communicating with eMarketplace Suppliers

There may be times when you need to contact the suppliers directly. In these situations, you should consult the OGS Procurement Services website (www.nyspro.ogs.ny.gov) to find the correct supplier contact information for users of the centralized contract. This information can be found in the contract award document, contract update documents, and/or contractor information documents on the state contract award page for the relevant award.

7. Who to Contact for Assistance

If you have any difficulty using the eMarketplace or if you have questions that are not answered in this guide, please contact the OGS Procurement Services Customer Services at customer.services@ogs.ny.gov or (518) 474-6717.