How to Use COMeT for Authorized Users

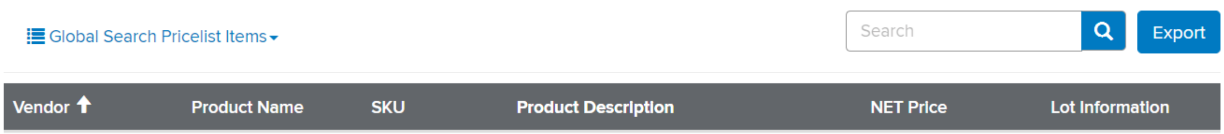
This guide is intended for Authorized Users who are using COMeT to search and view pricelists as well as conduct Request for Quotes (RFQ). Any additional questions or concerns should be directed to the following mailbox: PsMfrUmbrella.AuthorizedUsers@ogs.ny.gov.

Section 1. SEARCHING PRICELISTS

The Search Pricelists page can be utilized to search across all Contractor pricelists at once. Users can also limit a search by Contractor or by several other fields. In some cases, it may be best to utilize the spreadsheet documents shared under the Vendor Documents section. These are the Appendix E pricelists for each vendor. More on these in section 2.1.

1.1 PRICELIST VIEWS – GLOBAL AND APPENDIX E

Prior to conducting a search within the Search Pricelists page, it's important to know which pricelist view you are utilizing. The default view is a truncated one which only shows a few key columns. This view is called Global Search Pricelist Items, and any results will show the following columns only:



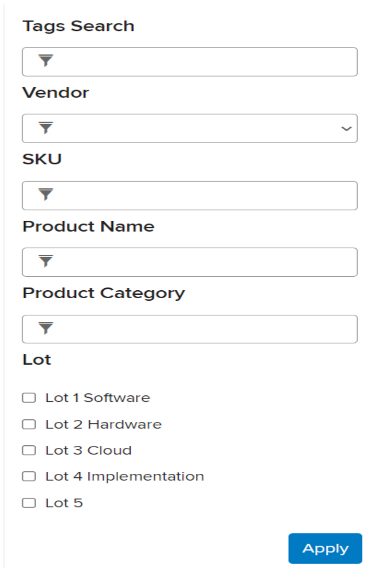
This view can be changed by clicking Global Search Pricelist Items and selecting the alternate view from the dropdown, called Appendix E Pricelist Items. Using this view will allow you to see all columns from an approved pricelist however scrolling may be needed to see all columns depending on monitor size.

1.2 PRICELIST FILTERS & WILDCARD SEARCHES

The fields on the left can be used to sort or to filter by Vendor (Contractor), SKU, Product Name, Product Category, or Lot. It's also possible to sort by Tags field, which is new with COMeT. This field was added to allow contractors to use a word or two to help users to locate their products more easily.

When entering keywords in any of these fields, it's important to know when an asterisk should be added to conduct a wildcard search. A standard search will return results that exactly match the text entered in the fields, and only if that text falls at the beginning of the result.

For example, searching for **print** in the Product Name field will return results for Printer – Multifunction, but won't return results for Multifunction Printer. On a similar note, entering **1234** in the SKU field will find SKU 1234-5678, but won't return a result for SKU ABC-1234. For either of these examples, adding an asterisk at the start of the search term will allow for a successful search. Searching for ***Print** in the Product Name field will return results where the product name is either Printer – Multifunction or Multifunction Printer; and searching for ***1234** will return both SKU 1234-5678 along with SKU ABC-1234.



The search field at the top right of the page will allow you to search across all columns of a pricelist at once and can be useful for more general searches. Finally, any search results can be exported into Excel using the Export button. Keep in mind however that a maximum of 5000 SKUs may be exported at once.

As a general rule of thumb, it can be helpful to first filter the pricelist view by Vendor and then search further by SKU or by keyword. This will not only improve the accuracy of the results that are returned, but also will typically speed up the search itself. Users may filter by vendor first, then add a keyword search in the product name field, and then even enter an additional keyword or SKU search in the top right search bar to continue to refine search results further and further. Just be sure to click the Apply button on the left side as filters or search terms are added there, and the magnifying glass on the top right as search terms are added to the top search box.

Section 2. VENDOR DOCUMENTS

2.1 VIEWING FULL CONTRACTOR PRICELISTS

The Appendix E excel pricelist for each contractor can be found in the Vendor Documents section of the COMeT portal. These can be found by clicking on the Resources menu in the top right, and then selecting Vendor Documents from the dropdown. On the new page, simply navigate to the contractor in question and select their blue hyperlinked name, then click the Appendix E document to download it in Excel. This document is system generated and will be updated automatically as pricelist modifications are approved by OGS. Similar to the Search Pricelist page, all products are contained in a single tab instead of being divided up by Lot, and there is a column that can be used to filter by Lot as needed.

Section 3. CREATING AN RFQ

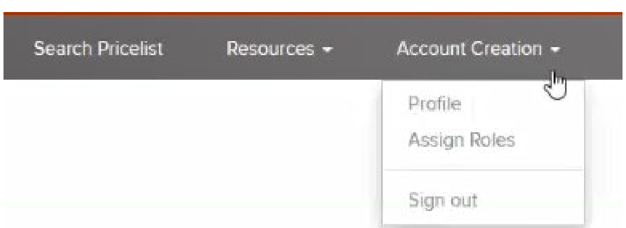
3.1 REGISTERING FOR AN AUTHORIZED USER ACCOUNT TO CONDUCT RFQS

Conducting an RFQ in COMeT requires users to register for a COMeT account and request the Authorized User role.

Users may register for a new account by selecting Sign In from the portal website and selecting Register from the available tabs, or by visiting the following link: https://comet.ogs.ny.gov/Account/Login/Register?returnUrl=0 . Once on the registration page, complete all fields and click Register.

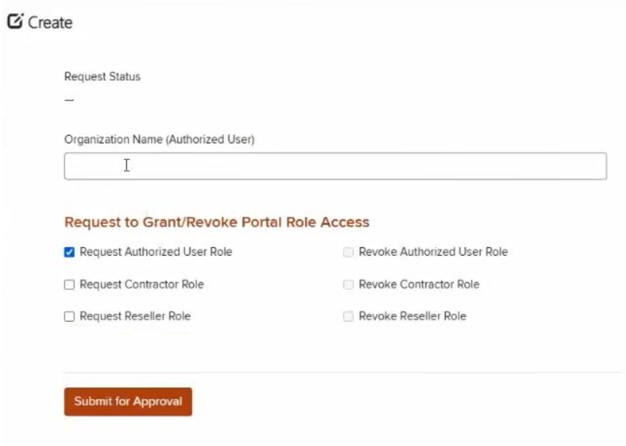
Next you will be brought to your profile page. At minimum here, please complete your first and last name and hit Update at the bottom.

Users must select a portal role. To access the RFQ functionality, you will need to the select the “Authorized User” role. To request a role, select your name in the upper right corner of the screen. From the dropdown, choose Assign Roles. Your first and last name should be prefilled on this next page. Fill them in here if needed.



On the next screen hit the Request Portal Role button under the Portal Role Management Section.

In the new window that appears select Request Authorized User Role. Once you select the Authorized User role you will be prompted to identify your organization. Enter your organization name in the organization field.



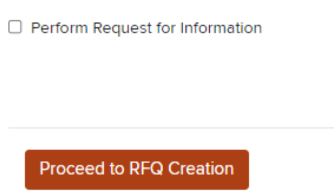
The role request will be sent to OGS for review. You can monitor the status of the request from this screen. An email will be received once your request has been approved.

3.2 STARTING THE RFQ

To create an RFQ, first navigate to the My RFQs page using the button at the top right. This area will be your RFQ “home page” where new RFQs can be created, open RFQs can be edited or reviewed for bid responses or questions, and closed or cancelled RFQs can be reviewed.

To create a new RFQ, simply select Create New RFQ. This will not only start the process, but will also actually create an RFQ within the system so that from this point forward you may always save and close the RFQ and come back to it later.

The first step in the process is to decide if you are conducting a Request for Information (RFI) or if you will proceed directly to your RFQ. If conducting a Request for Information, please see section 3.1.1. If you are proceeding directly to the RFQ stage, you will select Proceed to RFQ Creation without checking the box to Perform Request for Information.



On the next page you will fill out details for your RFQ, with all fields marked with an orange asterisk being mandatory.

For RFQ Type, either Basic or Cloud should be selected.

- Basic will allow you to select Lots 1, 2, and 4 for your RFQ.

- Cloud will allow you to select all four Lots and will add some additional fields that are specific to a cloud RFQ.

Under Type of Pricing there are three options.

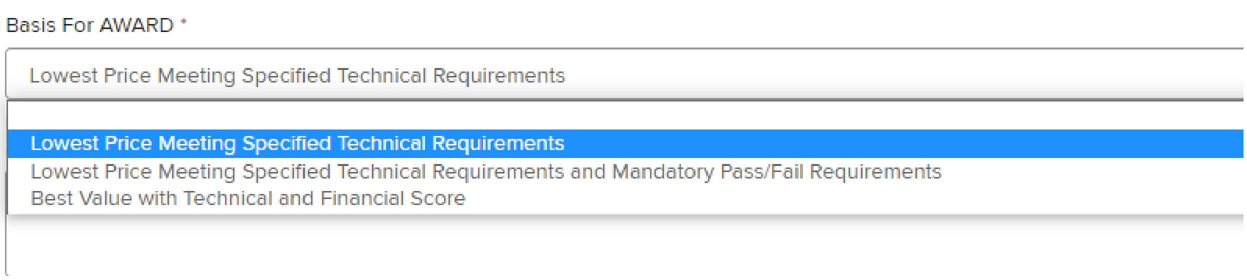
- Standard Pricing should be used for any RFQ where there is only a single SKU or set of SKUs to be purchased.
- Deliverable-Based Pricing should be utilized when a project or deliverable-based solution is desired, or when there are multiple sets of SKUs being submitted in the same RFQ.
- Total Cost of Ownership should be utilized for more complex RFQs, where your RFQ needs to be broken up not only into separate deliverables or groups of SKUs, but further broken into implementation items, recurring costs, and data transfer items.

All options will allow you to select SKUs to be sent out to bidders, along with adding a narrative or narratives regarding your needs. More details on each will be covered below.

If Target Single Contractor is checked off on the RFQ Information page, you will only be allowed to select one contractor to include in your distribution list, along with all of their approved resellers. A single contractor can only be selected if they have five or more resellers, otherwise you would need to include all contractors and their resellers from the Lot or Lots you are targeting.

For Basis of Award, there are three options to allow the flexibility needed to meet scenarios from basic to complex.

- Lowest Price Meeting Specified Technical Requirements
- Lowest Price Meeting Specified Technical Requirements and Mandatory Pass/Fail Requirements
- Best Value with Technical and Financial Score



Once you have completed all required information on this page, select Save and Continue.

3.2.1 Issuing a Request for Information

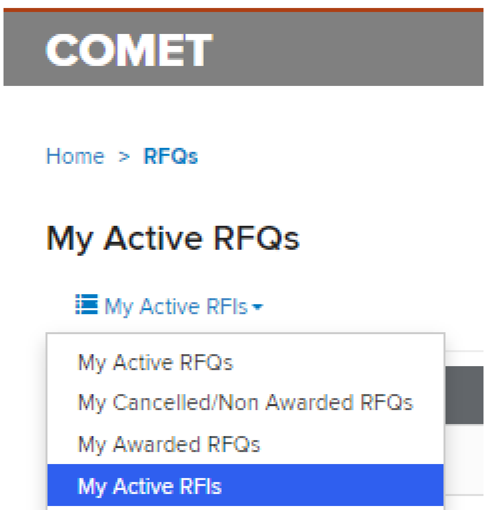
To issue an RFI, first check the box next to Perform Request for Information when first creating an RFQ. This will add a due date field along with another check box where you can indicate if potential bidders must respond to your RFI in order to be able to bid on any resulting RFQ.

Once these fields have been completed as needed, click Proceed to RFQ to complete your RFI. In the next screen you will be prompted to complete some of the initial fields you would complete when moving right to the RFQ phase.

When the RFI is issued, it will go out to all contractors in a given Lot or Lots. The Basic RFQ Type will allow you to submit your RFI to all contractors in Lot 1, 2, or 4, while the Cloud RFQ Type will allow you to submit your RFQ to contractors in any Lot. Where you are prompted to add RFQ information (ex. RFQ Title and RFQ Number) this information can be used as a placeholder, to be updated as needed if you issue an RFQ following the RFI results. You will be able to update any information if and when it comes time to issue the RFQ. Once all fields have been completed and any documents are attached, click Release RFI and Continue at the bottom of the page to send your RFI out to all contractors in the selected Lots. You will then be brought to the main RFQ section which you could complete and send out at any time, whether you receive responses to your RFI or not.

To view RFI responses, locate your My Active RFIs menu under the My Active RFQs section. Locate the RFI in question and select the blue arrow on the right side and choose Edit. You can then scroll to the bottom of the page to view RFI responses.

If you choose to proceed to the RFQ phase based on responses received in your RFI, you would complete the rest of the RFQ in this same area, following the steps in sections 3.1, 3.2, and 3.3.



3.3 CREATING A DISTRIBUTION LIST

In this step you will create your distribution list for your RFQ. Click Create/Update Distribution List to get started. At the top of the next page, click Load Vendors to load the list of contractors and their resellers in the Lot or Lots you selected previously for your RFQ. Depending on the number of Lots selected, loading the contractors can take a little time, typically 30-45 seconds. Once loaded, you can select a contractor or contractors and add them to your distribution list.

- If you are not targeting a single contractor that has five or more resellers, simply check the box labeled Select all Vendors and then scroll down and click Add Selected Vendors.
- If you are targeting one contractor with five or more resellers, find the contractor by either searching for them using the search bar in the top right or by finding them in the list of contractors. Once you have selected your single contractor, click Add Selected Vendors.

Once your vendors have been added to your distribution list below (this can also take 30-45 seconds if adding a large number of contractors at once) click Back to RFQ at the bottom of the page.

If you are satisfied with your distribution list, click Save and Continue on the next page to proceed to the financials section.

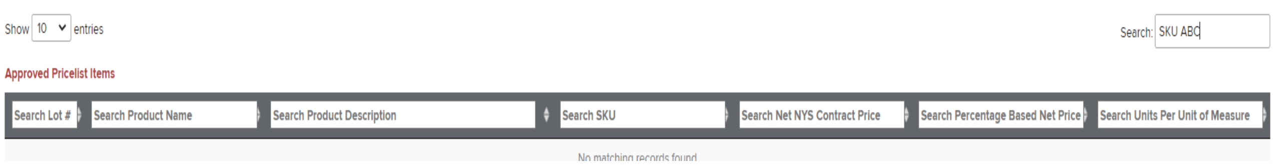
3.4 RFQ FINANCIALS

There are three types of pricing available for RFQs in COMeT – Standard Pricing, Deliverable-Based Pricing, and Total Cost of Ownership.

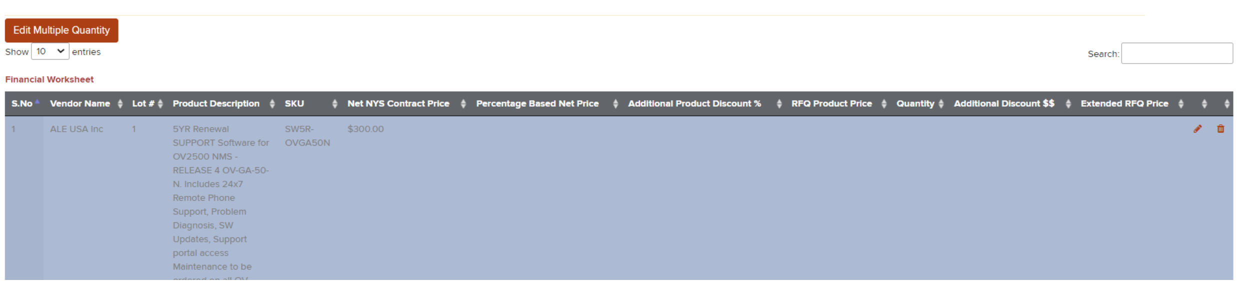
3.4.1 Standard Pricing

If you selected the Standard Pricing option under Type of Pricing, you will have the option now to add a single SKU or set of SKUs which will be sent out to your distribution list for the collection of bids. When you first get to the Financials area you will see a Description of Need text box. This can be completed or not, depending on whether you feel it will add value to your RFQ or otherwise.

To proceed to adding SKUs, click Add/Update Financials. If you are targeting one contractor only, their name will be prefilled in the Applicable Vendors dropdown. If you are sending your RFQ to all contractors in one or more Lots, you will select the contractor or contractors whose SKUs you would like to add here. When the appropriate contractor is selected, click Load Vendor's Approved Pricelist. This will load all approved SKUs for the selected contractor. For large pricelists, you may see the system load a few SKUs only, and then it will continue to load the rest of the pricelist in the background. At any time, you can begin typing out SKU numbers in the search bar in the top right and the pricelist will begin filtering as soon as you type. You can also search within any other field shown by clicking within the column headers and typing out a search term. Once you have located the SKU you need, click on it to highlight it and then click Add to Financial Worksheet. Repeat for all needed SKUs.



Once your SKU or SKUs are on the financial worksheet at the bottom of the page, you may wish to update the quantity field. You can edit this SKU-by-SKU by clicking on the pencil icon at the right side of each row, making your change, and clicking the save icon afterwards. You can also edit multiple SKUs at once by clicking each to highlight them and then clicking Edit Multiple Quantity. This will open up a new window where you can edit the quantity for multiple SKUs at once.

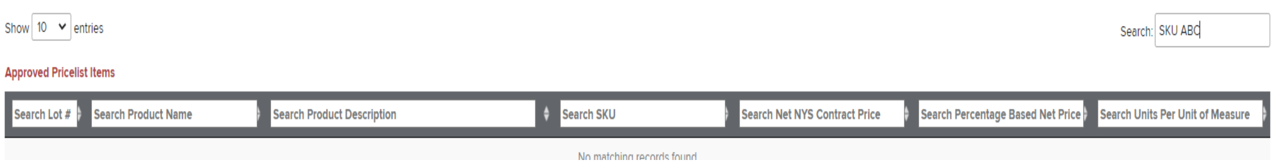


Once you have added all SKUs and edited quantities, click Back to RFQ at the bottom of the page and then hit Save and Continue in the next screen. To finalize your RFQ, go to the Finalize RFQ step further down in this guide. First, we will cover the remaining pricing options.

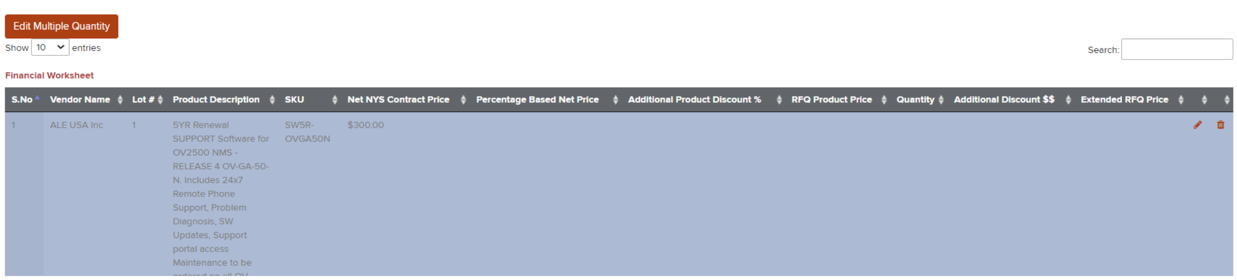
3.4.2 Deliverable-Based Pricing

If you selected the Deliverable-Based Pricing option under Type of Pricing, you will have the option to create deliverables, or to utilize the portal to create groups of different SKUs. To do either, first select Create Deliverables. On the next screen you need to set a deliverable name and can optionally add a deliverable number and narrative. Once this has been completed as desired, the next steps will follow those above for standard pricing.

Click Add/Update Financials, and then in the next screen you will select a vendor in the Applicable Vendors field. If you are targeting one contractor only, their name will already appear here by default. If sending an RFQ to all contractors in a given Lot or Lots, you will need to select the contractor whose pricelist you wish to load here. Once the correct contractor is set, click Load Vendor's Approved Pricelist. This will load all approved SKUs for the selected contractor. For large pricelists, you may see the system load a few SKUs only, and then it will continue to load the rest of the pricelist in the background. At any time, you can begin typing out SKU numbers in the search bar in the top right and the pricelist will begin filtering as soon as you type. You can also search within any other field shown by clicking within the column headers and typing out a search term. Once you have located the SKU you need, click on it to highlight it and then click Add to Financial Worksheet. Repeat for all needed SKUs.



Once your SKU or SKUs are on the financial worksheet at the bottom of the page, you may wish to update the quantity field. You can edit this SKU-by-SKU by clicking on the pencil icon at the right side of each row, making your change, and clicking the save icon afterwards. You can also edit multiple SKUs at once by clicking each to highlight them and then clicking Edit Multiple Quantity. This will open up a new window where you can edit the quantity for multiple SKUs at once.

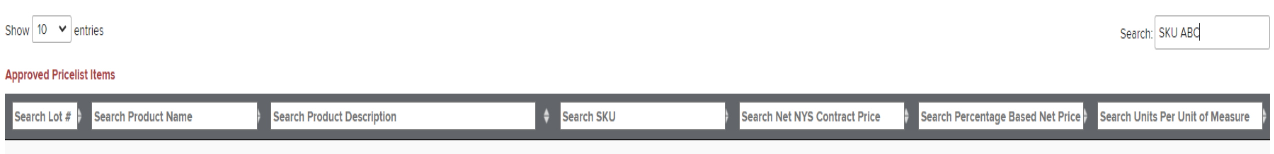


Once you have added all SKUs and edited quantities, click Back to Deliverable at the bottom of the page and then hit Submit in the next screen. From here you can create additional deliverables, following the same steps above.

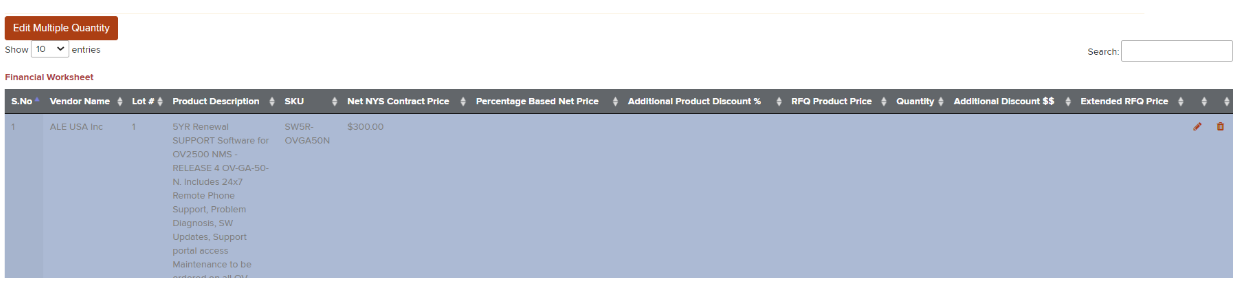
You can create multiple different groups of SKUs in this manner for your RFQ, and SKUs from multiple different contractors can be included in this way as needed, even within the same deliverable. Once you are satisfied with all deliverables, click Save and Continue at the bottom of the page to move on. To finalize your RFQ, go to the Finalize RFQ step further down in this guide. First, we will cover the last remaining pricing option.

3.4.3 Total Cost of Ownership

This pricing method works similarly to Deliverable-Based Pricing, except that groups of SKUs can be further divided up within the same deliverable into Implementation Items, Recurring Items, and Data Transfer Items. The initial steps mirror the process for Deliverable-Based Pricing. First click Create Deliverables. On the next screen you need to set a deliverable name and can optionally add a deliverable number and narrative. Once this has been completed as desired, click Save and Continue. In the next screen click Add/Update Financials, and then you will be able to start adding SKUs. Select a vendor in the Applicable Vendors field. If you are targeting one contractor only, their name will already appear here by default. If sending an RFQ to all contractors in a given Lot or Lots, you will need to select the contractor whose pricelist you wish to load here. Once the correct contractor is set, click Load Vendor's Approved Pricelist. This will load all approved SKUs for the selected contractor. For large pricelists, you may see the system load a few SKUs only, and then it will continue to load the rest of the pricelist in the background. At any time, you can begin typing out SKU numbers in the search bar in the top right and the pricelist will begin filtering as soon as you type. You can also search within any other field shown by clicking within the column headers and typing out a search term. Once you have located the SKU you need, click on it to highlight it and then click on either Add to Implementation Items, Add to Recurring Items, or Add to Data Transfer Items. Repeat for all needed SKUs for each section. You can also choose to use only one or two of the three sections



Once your SKU or SKUs are on the financial worksheet at the bottom of the page within the sections you are utilizing, you may wish to update the quantity field. You can edit this SKU-by-SKU by clicking on the pencil icon at the right side of each row, making your change, and clicking the save icon afterwards. You can also edit multiple SKUs at once by clicking each to highlight them and then clicking Edit Multiple Quantity. This will open up a new window where you can edit the quantity for multiple SKUs at once.



Once you have added all SKUs and edited quantities, click Back to Deliverable at the bottom of the page and then hit Submit in the next screen. From here you can create additional deliverables, following the same steps above. To finalize your RFQ, go to the Finalize RFQ step further down in this guide.

3.5 FINALIZE YOUR RFQ

When you are satisfied with the financial section of your RFQ, click Save and Continue to move on to the final steps. The last section is where you will add any needed documents and then actually submit your RFQ to your bidder pool. To add documents, click Add RFQ Documents. On the next page you will be prompted to select something in the Type of Documents dropdown, and then you can optionally add a new file to your documents. You can upload documents one by one in this way, or you can upload all documents together. There are no document format restrictions, and the size limit for a single document is 50mb, so you should be able to upload anything you need here. When you are satisfied with the documents you have uploaded, click Submit.

Finally, under Submission Options there is a dropdown you can either leave at Save as Draft to save your RFQ for future release, or you can change this to Release RFQ if you are ready to send it out. Once you have selected an option click Save and Continue.

If you selected Release RFQ, an automated email will now be sent out by the system to all bidders in your bidder pool.

3.6 EDITING YOUR RFQ

Editing an RFQ is as simple as navigating to the My RFQs page and finding the RFQ in question from your My Active RFQs grid.

Once you have located the RFQ you wish to edit, use the blue dropdown on the right side and select Edit. When editing an existing RFQ, you will see all parts of the RFQ in a single page instead of the timeline view that was utilized when first creating your RFQ. You can edit anything here following the same steps from when you created the RFQ.

If you haven't yet released the RFQ you can also do so here at the very bottom. If you have already released the RFQ, when you go to edit it you will see a pop-up informing you that an email will be sent to everyone in the bidder pool once your updates have been completed. This will help bidders to stay on top of any changes you make to active RFQs so they can proceed accordingly.

When you have finished making any changes to a released RFQ, there are two comment boxes you can complete. The first box is optional and is labeled AU Comments. This is for any internal notes you wish to make about your changes to this RFQ. The second box is labeled Update Comments, and this one will be visible to all bidders. This is to let them know exactly what has been changed with the RFQ after it was released. Both fields will be captured in the procurement record COMeT generates, which will be covered in a later section.

Once you have made all changes and added comments, click Update RFQ and an automated email will go out to your bidder pool regarding your changes.

3.7 QUESTIONS & ANSWERS

After your RFQ has been released, bidders may choose to submit questions. They can do this at any time, regardless of whether or not you set a due date for questions when constructing your RFQ. When questions are submitted, an automated email will be sent to you to let you know.

To view questions, navigate to the RFQ in question within your My Active RFQs grid. Once you have located the RFQ, click the blue dropdown on the right and select Questions & Answers. Any questions will appear here.

If you wish to answer a question, click the blue dropdown to the right of the question and select Answer. In the new window that opens there are two fillable fields. One is where you can re-write the bidder’s question as needed, so as to remove any proprietary information or anything else you do not wish to publish to all bidders. If you do not need to change anything from the submitted question, you can simply copy it down to this box. Add your answer to the question in the Answer field and then click Submit when you are finished. This will NOT publish the answer immediately. You can view and answer questions as they come in, and potentially hold off on sharing answers right away.

When you are ready to share answers, check the box with the text ‘Answers are Complete. Notify Contractors/Resellers.’ If you are not yet ready to share answers, you can leave this box unchecked. Either way, click Submit once you are finished. If you have published answers out to the bidder pool and then additional questions come in, you can go back in and add the additional answers and then simply check the box again and hit submit to notify bidders that additional answers are available.

Section 4. REVIEWING BIDS

4.1 VIEWING BIDS

While you will be able to see the number of bid and no bid responses at any time, you will not be able to view the responses themselves until after the RFQ due date.

When your submission due date has passed and you are ready to review responses, navigate to the RFQ in your My Active RFQs grid, select the blue dropdown arrow on the right side, and click Edit. Next, scroll to the very bottom of the page to view bid and no bid responses. These will be displayed in a grid with the bidder’s name and contact details, whether their response is a bid or no bid response, their submission date, and the total pricing for their bid if submitting a bid response.

To view bids, click the blue dropdown arrow and choose View Response. In the next screen you will be able to review the financial submission for this bidder, with their submitted pricing per line along with total pricing. You can also review any documents they may have attached here.

Actual review of bids should be conducted outside of COMeT, following any established procedures, and as indicated in the Basis of Award section. You are not obligated to go with the lowest bidder if there are any other factors in consideration such as pass/fail requirements etc.

4.2 AWARDING BIDDERS

When you have selected a winning bidder after reviewing outside of COMeT, you can proceed to award that bidder and send award and non-award messages through the portal.

Using the blue dropdown arrow to the right, you can award a bidder and create an award communication message. Once the message has been added, click submit to send an email out to the awarded bidder.

Once this has been done, all other bidders will be marked as not awarded. You can send non award communication in a similar manner, by clicking the blue dropdown option on the right and selecting non-award email. Create a message to be sent to this bidder and click submit for an automated email to go out to them with your message.

4.3 PROCUREMENT RECORD

You can generate the procurement record from within COMeT at any time, whether you have already awarded a bidder or if you are still working on building your RFQ in the system. This can be useful if approvals for your RFQ are needed before it is sent out to your bidder pool, as the report is generated in PDF format and can be easily shared as needed.

To generate the document, locate the RFQ in question from within your My Active RFQs or Completed RFQs grid, click on the blue dropdown arrow on the right and select Send Procurement Record. A new window will appear where you can enter an email address, or multiple email addresses separated by semi-colons. Your email address should appear here already by default, but you can remove it and add different email addresses as needed.