State Printing Procedures in Ohio|Buys

Published: May 2021
Prepared for State Printing end-users responsible for creating, releasing, and awarding solicitations, as well as updating, reviewing, and approving purchase requisitions in Ohio|Buys.
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CREATE A STATE PRINTING RFI OR ITB

Overview

• **What’s Covered:** This section discusses the process of creating and releasing a Request for Information (RFI) or Invitation to Bid (ITB) as a Printing Contract Analyst in Ohio|Buys
State Printing sourcing projects in Ohio|Buys will always use the **Single Envelope** project type. Single Envelope solicitations are those in which Bidders and/or Suppliers are instructed to submit all aspects of a response in a single envelope.

1. Log in to Ohio|Buys. From the Main Menu Navigation bar, click **Sourcing** and then select **Create Sourcing Project** from the drop-down menu.

The Create Sourcing Project page is displayed. On this page, you will need to complete the **Sourcing General Information** section. Note that any fields with a red asterisk are mandatory and must be completed to continue.

   ![Sourcing General Information](image)

   **a)** Update the **Label** field with the name for the sourcing project. This field is visible to Suppliers and must contain a brief, straightforward description of the purpose of the solicitation. If creating the solicitation from a purchase requisition, this field will default to the purchase requisition label and should be updated so that the needs of the solicitation are easily understandable for potential Bidders and/or Suppliers.

   **b)** Set the **Project Type** field to **Single Envelope**.

   **c)** Select **DAS-Administrative Services** as the **Contracting Entity**.

   **d)** Indicate the **Commodities** included in the solicitation. (e.g., 55100000 Printed Media) Additional commodities can be indicated using the **Other Commodities** field.

2. Click **Save**.
Navigate to the **Setup Documents** tab.

In the **Sourcing Documents** section, upload documents specific to this solicitation. To upload a document, click **Create document for this project**.

To upload the PRO, select the **Internal Project Documents** type from the list below.

▲ If documents besides the PRO need to be added to the internal document repository, you may select from one of the document types below. Note that the Public document types will only be made publicly available after the solicitation has been awarded and there is a signed contract associated with it. To make documents visible to responding Suppliers please make sure that they are included on Documents header of the **Prepare Solicitation** tab.

1) **Confidential Documents** – Documents associated with the solicitation that bear some level of confidentiality
2) **Evaluation Documents** – Documents relevant to how proposals will be evaluated
3) **Internal Project Documents** – A catchall for all other relevant internal documents associated with the solicitation
4) **Pre-Solicitation Assessment Documents** – Documents relevant to the need. This might include a project intake form, risk assessment, data assessment, etc.
5) **Public Proposals** – Responses to the solicitation that are publicly available – note that these will not be available until after responses have been received
6) **Public Solicitation Documents** – Relevant solicitation documents that are released to the public
Create a State Printing RFI or ITB

Step-by-Step Instructions for Creating a State Printing RFI or ITB

Update the document information by including:

- **Title**: The name of the document.
- **Summary**: A description of the document contents.
- **Status**: Whether the document has been approved, drafted, blocked, or requires approval.

Click **Click or Drag to add files** to upload a document.

Select a document from your PC and click **Open** to upload it.

Click **Save & Close** to upload the document.

Navigate to the **Add Suppliers** tab.
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

12 Click the **Selector** (    ) icon on the **Select Suppliers** field. Click **See All**.

13 Remove the **Commodity** filter by clicking the **X** icon.

14 Search for **DAS01** using Keywords search.

   a) click the **Checkbox** (    ) icon to the left of the DAS01 Supplier Record.

   b) Click the **X** icon to close the pop-up.

15 Click **Save**.

If the MBE Set Aside slider is clicked, the solicitation will be flagged as MBE set aside on the Public Solicitations page. Users will only be able to invite MBE Suppliers to respond to the solicitation. Additionally, only registered MBE Suppliers will be able to respond to the solicitation.

Engaging the MBE Set Aside slider will also update the Market Type field on the Setup Project tab.
Navigate to the **Prepare Solicitation** tab.

On the **Prepare Solicitation** tab:

a) Select the **RFx Type** from the drop-down menu. RFx types include:

1) **Request for Information (RFI)**: aimed at obtaining information about the capabilities and offerings of various Suppliers. Note that RFIs are not used to make awards to suppliers, if you intend to award a job to a supplier, use the ITB RFx type

2) **Invitation to Bid (ITB)**: aimed at obtaining responses from invited Suppliers

3) **Cancellation**: Used in a later round to cancel an existing RFx

b) If needed, update the **Solicitation Name**. At a bare minimum, this field should include a description of the solicitation that will be understandable to Bidders and/or Suppliers unfamiliar with the State. Please avoid using acronyms.

c) Indicate whether or not the solicitation is an **Amendment**.

d) Indicate the **Open and Closure** dates. These are the dates the solicitation will be available for Suppliers to respond to.

e) Indicate the **Inquiry Period** – these are the dates during which Suppliers can ask questions about the details of the solicitation. These should align with the **Open and Closure** dates.
On the **Prepare Solicitation** tab:

- **f)** Indicate the **Enable for Public Posting** dates – these are the dates during which the solicitation will be available for viewing on the public portal. Public posting dates should match the Open and Closure Dates and will auto-populate to match the Open and Closure Dates when they are initially filled out.

  ▲ If subsequent changes are made to the Open and Closure Dates, the Public Posting Dates will need to be manually updated to match.

- **g)** Complete the **Process** section to provide a general overview of the selection process that will be used to award the solicitation. It is important to complete this field with as much detail as possible to keep Suppliers effectively informed about the selection process (e.g., for a Public Notice solicitation, provide instructions on where responses should be submitted since they will be submitted outside of Ohio|Buys; for a bid/quote, explain that an award will be made to the lowest responsive and responsible Bidder and/or Supplier).

- **h)** Complete the **Summary** section to introduce and provide a general overview of the purpose for the request. It is important to complete this field with a straightforward explanation of what goods/services the solicitation is for, to provide Bidders and/or Suppliers with a high-level understanding of what is being sought.

**Click Save.**
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

Step-by-Step Instructions for Creating a State Printing RFI or ITB

19 Within the Prepare Solicitation tab, navigate to the Questionnaire header.

20 Upload the Standard_Printing_ITB_Questions.xlsx file, which includes the questionnaire.

   To upload the spreadsheet select Click or Drag to add a file, navigate to the file on your computer, and press Open.

21 To add additional questions to the questionnaire individually, click the + icon.

   a) Select the Question Type from the drop-down menu.
   b) Write the details of the question in the Section/Question section.
   c) Indicate whether the question is Mandatory and whether it will be scored by clicking the associated checkboxes.
   d) Click Save.

   ▲ Click the Preview button after adding questions to your questionnaire to review it.

22 Within the Prepare Solicitation tab, navigate to the Evaluation Questionnaire header.

   Configure the weight of each section as necessary. When adjusting the weighting for a questionnaire, users should change the weighting value in relation to how much they want that question/section to be emphasized. Note that weighting will always sum to 100%.

   ▲ Note that the Evaluation Questionnaire is optional and can be left blank if not needed.
Users must assign the Sourcing Responsible as the evaluator in the Default Responder Rules section. The Sourcing Responsible will be the user who created the solicitation.

1) **Assign**: In this field, search for and select the **Sourcing Responsible** user from the dropdown menu.

2) **Add the Rule**: Click to add the rule and assign the Sourcing Responsible as the evaluator of all questions.

Click **Save**.

Within the Prepare Solicitation tab, navigate to the **Items** header.

Click **Import Grids from Excel** and select the Standard_Printing_Item_Grid.xlsx file. This file contains the template State Printing item grid for Ohio|Buys.

To upload the spreadsheet select **Choose File**, navigate to the file on your computer, and press **Open**.
Step-by-Step Instructions for Creating a State Printing RFI or ITB

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Complete the item grid fields. Note that a red asterisk indicates that a field is mandatory, while (V) indicates that a field will be visible to potential Bidders and/or Suppliers.

Add items as required in the blue line as required to add a new line to the solicitation.

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Continue to add items to the grid as necessary by selecting Add an Item from the Actions drop-down menu. You can use the Preview button to see what the item grids would look like to a Supplier.

Columns within an item grid can also be added or removed. To access the list of columns displayed, right-click the column header.

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To remove existing columns, click Delete the field for that column header.

Click Save. Repeat steps 27-29 as required to add additional line items.
Navigate to the **Documents** header within the Prepare Solicitation tab.

Indicate which documents should appear on the RFx.

▲ Any document that should be visible to respondents must be included in this section,

a) Click **Create a Document** to upload a document that does not exist in the Setup Documents tab. You will be asked to select a document type. The process for doing this is the same process covered in the Upload and Manage Solicitation Documents section of this guide. While most of the document types are the same as those covered in the Upload and Manage Solicitation Documents section, the following options are unique to the Prepare Solicitation Tab:

- **[Template] RFx Excel answer form** – The item grid in Excel format
  ▲ Adding the RFx Excel answer form is not required. Suppliers can also fill out the item grid directly in the system, which is the recommended approach for Printing ITBs.

- **Ad-hoc Solicitation Document** – A document specific to the relevant solicitation that does not fall under one of the other document types

- **RFx Commercial Documents** – Reference documents that can be referred to on all State projects (i.e. documents puled from the General Documents section of the Setup Documents tab, etc.)

- **RFx Technical Documents** – Technical documents related to the RFx

b) Click **Attach Existing Documents** to select any documents already contained in the Setup Documents tab by clicking the **Checkbox ( □ )** icon to their left.

Click **Save & Close**.
33. Click **Submit**.

34. Click **Send**.

35. Click **Send & Close**.

Click **OK** in both pop-ups that appear.

The solicitation has now been posted and is available for responses.

▲ For more information on activities related to managing the solicitation, as well as analyzing and awarding Supplier responses, please refer to the Creating Managing and Awarding Solicitations Learner Guide.
Overview

- **What's Covered**: This section discusses the process of reviewing a commercial printing purchase requisition and the associated solicitation as the assigned Printing Contract Analyst.
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

1. Log in to Ohio|Buys. The My Pending Validations window on the Ohio|Buys homepage shows the most recent tasks that are awaiting your review. If desired, you can click on the **Object** hyperlink for any tasks that have an **Action** of Printing Contract Analyst to quickly view and take action on any purchase requisition needing your approval. Once you have found the task you would like to open, click on the **Object** name.

2. Confirm that the buyer has attached the appropriate PRO document by clicking on the **Attachments – Internal, Supplier and Justification** section header to expand the section. To review the documents, click the **Title** hyperlink.

   ▲ To download a copy of the document click the **PDF (   )** icon.

3. Review the information contained in the purchase requisition. If the requisition is justified and the details are satisfactory, click the **Approve** button to approve it.

   If any aspect of the purchase requisition requires further revisions, click **Reject**. This sends the request back to the Requisitioner who worked on the requisition for revisions as needed.

   ▲ If you reject a purchase requisition, you will be asked to type the reason for the rejection in a pop-up comment box. These comments will be emailed to the Requester.

   ▲ For requisitions that have the Commercial Printing slider checked, the Bill To address will update to the State Printing address once the purchase requisition is fully processed into a purchase order.
# Version Control

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