Creating, Managing, and Awarding Solicitations in Ohio|Buys

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Prepared for agency end users responsible for creating, approving, managing, and awarding solicitations in Ohio|Buys.
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Overview: This learner guide covers the core activities related to creating, reviewing, approving, and managing solicitations in Ohio|Buys.

Processes Covered:

1) **Sourcing Setup:** Ohio|Buys provides a unified platform for sourcing activities relevant to the State of Ohio. Users have the ability to create a variety of solicitations to suit their needs, as well as access to Ohio|Buys’s powerful search tools for identifying and contacting Suppliers.

2) **Review and Posting:** Ohio|Buys allows for robust teaming capabilities when working on solicitations at nearly every step. Users can establish their team with specific permissions applicable to each teammate and approver, and solicitations are automatically routed to the reviewers that need to see them.

3) **Supplier Response and Management:** Ohio|Buys makes it easy for users to keep track of their active solicitations by reviewing Supplier activity and responding to inquiries. Users can modify existing solicitations with new lots and rounds as required by the sourcing need.

4) **Analyzing and Awarding:** Users have access to a variety of tools in Ohio|Buys to open and analyze Supplier responses side-by-side. Once a winner has been selected, users can notify the Supplier directly within Ohio|Buys and update any relevant purchase requisitions based on the results of the award.
Navigating This Document

Sourcing Project Types in Ohio|Buys:

- **Simple Solicitation**: Solicitations that allow agencies to create and distribute Requests for Information (RFI) and Requests for Quotes (RFQs). Also used for Cancellations.

- **Single Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit all aspects of a response in a single envelope. Can optionally be awarded via reverse auction.

- **Double Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit both technical and financial responses in two separate and sealed envelopes.

- **Triple Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit technical, financial, and mandatory responses in three separate and sealed envelopes.

- **Quick Quote**: A quick quote is a simplified short-term solicitation process. Please refer to the Quick Quotes Learner Guide for more information on this solicitation type.

- **Public Notice**: Notifies the public of a solicitation that will be evaluated and awarded outside of Ohio|Buys.

Please note, certain sections of this learner guide only apply to some of these sourcing project types. To determine which sections of this learner guide you will need to review for a sourcing project type, please refer to the table on the following page.
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Key Terms

The following are key terms that you will see referenced throughout this learner guide.

1) **RFx**: A solicitation in Ohio|Buys that is composed of lots and rounds. An RFx is always associated to a Sourcing Project; a Sourcing Project may have multiple RFx’s associated to it.

2) **Sourcing Project**: Any kind of sourcing event in Ohio|Buys. This includes all types of solicitations, as well as Quick Quotes. Sourcing projects can have multiple lots and/or rounds.

3) **Questionnaire**: Used to gather information and the necessary inputs for the mandatory, technical, and/or financial questionnaires of a solicitation. Can also be used to gather requirements from State users to help develop the scope of work (SOW).

4) **Requirements Gathering**: The process of a project owner sending out questionnaires to internal stakeholders to determine the scope of work (SOW) for a solicitation.

5) **Item Grid**: A place where users can configure the items that they want the Supplier to submit a responses for when replying to the Solicitation. This is equivalent to a cost summary or price sheet today.

6) **Project Schedule**: A structured schedule of tasks associated with a solicitation created by the project owner and assigned to team members.

7) **Lots**: A new lot is typically issued for Bidder and/or Supplier clarifications. Lots can be used to clarify information or separate the different needs for a specific solicitation. For example, a procurement user may wish to separate a solicitation for a conference into different lots. One lot could be created for food, while another could be created for IT equipment.

8) **Rounds**: A new round is typically issued whenever there is amendment to the original solicitation or when you want to issue a second round of bidding for a shortlisted group of Bidders and/or Suppliers.
CREATING AND MANAGING SOLICITATIONS

Topics

• Create a Sourcing Project
• Manage Solicitation Team Members and Roles
• Define a Solicitation Project Schedule
• Gather Requirements for a Solicitation
• Upload and Manage Solicitation Documents
• Complete the Prepare a Solicitation Tab
• Setup Mandatory, Financial, and/or Technical Questionnaires for a Solicitation
• Setup a Solicitation Item Grid
• Define Preference Factors for a Solicitation
• Invite Potential Bidders and/or Suppliers to Respond to a Solicitation
• Submit a Solicitation for Review and Approval
CREATE A SOURCING PROJECT

Overview:

- **What's Covered**: The process for initiating a new solicitation in Ohio|Buys.
- **Used When**: Starting a new solicitation
The following Sourcing Project Types are available in Ohio|Buys:

1. **Simple Solicitation**: Solicitations that allow agencies to create and distribute Requests for Quotes (RFQs).

2. **Single Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit all aspects of a response in a single envelope. Can optionally be awarded via reverse auction.

3. **Double Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit both technical and financial responses in two separate and sealed envelopes.

4. **Triple Envelope**: Solicitations in which Bidders and/or Suppliers are instructed to submit technical, financial, and mandatory responses in three separate and sealed envelopes.

5. **Quick Quote**: A quick quote is a simplified short-term solicitation process. A quick quote is a simplified short-term solicitation process. Please refer to the Quick Quotes Learner Guide for more information on this solicitation type.

6. **Public Notice**: Notifies the public of a solicitation that will be evaluated and awarded outside of Ohio|Buys.

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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.

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) Select the **Project Type**.

c) Indicate the **Status**. This field should always be left as **In Progress**.
d) Select the **Contracting Entity**. This field is typically the agency or group responsible for initiating the solicitation.

e) Add any additional **Participating Organizations** if applicable. These are the organizations that are allowed to access and purchase items from the solicitation.

e) Add the relevant **Commodities** and **Other Commodities** to the solicitation. The selections made here will drive which potential Bidders and/or Suppliers are shown on the Add Suppliers tab. Note that other Suppliers can still be invited to participate even if their profile does not list the commodities associated with the solicitation.

f) Indicate the **Project Start Date**. This will default to the date the project is created, but can be retroactively or future dated if required.

g) Use the **Market Type** field to indicate the type of suppliers that will be involved in the solicitation.

h) If there is a **Request to Purchase** associated with the solicitation, you can search for it and select it from the drop-down menu.

i) Input the **Index Number** if there is one associated with the solicitation. An index number is a short contract designator, often represented by three alpha characters followed by three numbers.

Click **Save**.
MANAGE SOLICITATION TEAM MEMBERS AND ROLES

Overview

• **What's Covered**: The process for adding team members to a solicitation in Ohio|Buys and assigning their roles.


• **Used When**: Setting up a solicitation in Ohio|Buys
Step-by-Step Instructions for Managing Solicitation Team Members and Roles

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

2. The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

   ▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters (▼) icon.

3. Open the sourcing project you would like to edit by clicking the Pencil (✍) icon.

4. Navigate to the Setup Team tab.
The Team page is displayed. To add a team member, click in the Select Team Members field and type in the user’s name, then select it when it appears from the drop-down menu.

Select a team member’s role under the Profile header. Available roles include:

a) Ad-hoc Approver (Sourcing Project): Acts as an additional approver before the Posting Approver when posting a solicitation.

b) Contributor (Sourcing Project): Can update the solicitation with additional information.

c) Evaluator (Sourcing Project): Can evaluate Supplier responses to a solicitation.

d) Posting Approver: Reviews and approves the solicitation prior to posting.

▲ If assigning a Posting Approver, the Posting Approval Required field on the Prepare Solicitation tab must be set to Yes.

e) Records Review: Reviews solicitation documents prior to them being publicly posted, to ensure the proper files are posted (e.g., redacted documents).

f) SME (Sourcing Project): Can review and update certain aspects of the solicitation based on their subject matter expertise.

▲ Note that users can be assigned multiple roles.

▲ To remove a role, click the X icon to its left.

▲ To remove a user from the team, click the Trashcan (🗑️) icon to the left of the user’s email address.

▲ The user with the Responsible role for the solicitation is required to add all of the necessary approvers to their team.

Click Save.

Repeat steps 5-7 to add the remaining team members to the solicitation as needed.
DEFINE A SOLICITATION PROJECT SCHEDULE

Overview

- **What’s Covered**: The process for setting up a project schedule on a solicitation in Ohio|Buys
- **Used When**: Setting up a schedule for a solicitation in Ohio|Buys
Step-by-Step Instructions for Submitting a Hosted Catalog

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

2. In the Keywords field, search for the solicitation that you would like to edit and select the Pencil (✏️) icon next to the project.

Navigate to the Project Schedule tab.

3. ▲ Project schedules can be created from schedule templates or ad hoc by adding tasks.
   a) To create a schedule from a template, click Create from a Template Schedule.

4. Select the Checkbox (☐) icon next to the solicitation that will be used as a template. Each task from the template will be added to the current solicitation. Refer to step 4c to edit an existing task.

   ▲ Clicking this button and adding this template will prepopulate your project schedule with a series of milestone tasks that can be subsequently edited and refined.
Step-by-Step Instructions for Defining a Solicitation Project Schedule

b) To add a new task, click **Add a Task**.

Complete the mandatory fields.

The mandatory fields are:

- **Step** – The name of the task
- **Type** – The action to be completed as part of this task
- **Owner** – The user responsible for creating the task
- **Assigned To** – The user responsible for completing the task
- **Description** – A detailed description of the task
- **Initial Start Date** – The date the task is scheduled to begin at the time of its creation
- **Initial End** – The date the task is scheduled to be completed at the time of its creation

When finished, click **Save & Close** to exist or **Save & New** to save this task and create another.

c) To edit an existing task, click the **Pencil (✏️)** icon next to the task. Update the information within the fields as needed and click **Save & Close**.

▲ After you have added tasks to your project schedule, you can update progress on the Project Schedule tab by clicking on the Pencil icon for the task you wish to update. Once you have made your updates, click the Save & Close button. All tasks assigned to users will be available on the My Open Scheduled Tasks page.
Overview

- **What’s Covered**: The process for gathering requirements for a solicitation within Ohio|Buys
- **Used When**: Defining the requirements to fulfill a need using a solicitation in Ohio|Buys. Please note this process is optional in Ohio|Buys
1. Log into Ohio|Buys. From the main menu navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

2. In the **Keywords** field, search for the solicitation that you would like to edit and select the **Pencil (✏️)** icon next to the project.

3. Navigate to the **Requirements Gathering** tab.

4. Enter the begin and end dates for the assessments. These are the dates in which you would like the assessment questionnaires to be completed within. You can also check the **Autoclosure** checkbox if you would like the assessment to automatically close the responses after the end date.
Gather Requirements for a Solicitation

Step-by-Step Instructions for Gathering Requirements for a Solicitation

5

Press Save.

Navigate to the Questionnaire tab that appears.

6

a) To create a questionnaire from a template, click Add Questionnaire Template. Use the Keywords field to search for the pre-existing template and select the Checkbox ( ) icon next to the template you wish to use.

b) To create new questions, click the + icon. Select the section Type. Refer to the Setup Mandatory Technical and/or Financial Questionnaires section for instructions on how to set up the various question types.

After selecting the Type, click Save at the top of the page. Additional settings will become available depending on the question type selected.
To set up the different question types:

- **Section**: This field type creates a group to house multiple questions that are similar in nature.
- **Subsection**: This field type creates a sub-group to house questions that are similar in nature within a specific section.
- **Text**: This field allows the respondent to type the response into the questionnaire without restrictions on the type of characters that are used (i.e. letters, numbers, symbols).
- **Long Text**: Similar to a Text field, this field type allows all character types in the response. The character limit for Long Text questions is significantly longer than for Text and should be utilized for in-depth responses.
- **Numeric**: This field will only allow numeric characters without symbols such as periods, commas, or dashes.
- **Date**: This field will only allow answers in the date format. When the respondent clicks inside the field, they will be able to select a date from a calendar.
- **Attachment (Single File)**: This field allows the respondent to attach one file to the questionnaire.
- **Attachments (Multiple Files)**: This field allows the respondent to attach multiple files to the questionnaire.
- **List of values**: This field allows the sourcing responsible to restrict the respondent’s answer to a list of values.
- **Selector**: This field allows the solicitation admin to restrict the respondent’s answer to a list of values. The list must already exist in Ohio|Buys. (e.g., country, state) To make your own list, please use List of Values.

To edit the details for a question and add answer options, click the **Pencil (✏️)** icon next to the question. Complete the mandatory fields in the **Questionnaire element** section.
The **Advanced Properties** section allows users to indicate if multiple answers are allowed for a single question, if the question is required, if additional comments can be added to clarify an answer selection, or if the respondent can add an attachment to their answer.

The **Conditional Constraints** section allows the solicitation admin to create rules for the questionnaire. For example, the answers to this question can be limited based on how the respondent has answered a prior question. All of the rules use “if/then” statements.
Gather Requirements for a Solicitation

Step-by-Step Instructions for Gathering Requirements for a Solicitation

11. When finished editing the question details, click **Save & Close**.

12. Repeat steps 6-11 to add more questions. When the questionnaire is complete, click **Preview** to see what the questionnaire will look like from the respondent’s perspective.

13. To assign respondents to complete the questionnaire, navigate to the Default respondent rules section.
   
a) In the **For** field, select one, multiple, or all sections that the respondent needs to complete. Note that this field cannot be left blank and that sections must be specifically assigned in order for reviewers to be able to complete them.

   b) The **Assign** field allows you to assign one, multiple, or all sections to a specific person to complete. If you would like to assign multiple people who have the same role or local profile on this solicitation, then select the role in the **Or** field instead of selecting a value in the **Assign** field.

   ▲ If the questionnaire is being assigned to users with a specific role or local profile, the respondents must be added to the Setup Team prior to releasing the questionnaire.

   After selecting the appropriate values, click **+Add the Rule**.

14. After assigning respondents, click **Open for Answers** to release the questionnaire.

15. The user responsible for completing the requirements gathering questionnaire will receive a notification in the My Pending Validations section of their homepage. If assigned a requirements gathering questionnaire, click the Object Hyperlink in the notification to open it.
Step-by-Step Instructions for Gathering Requirements for a Solicitation

The requirements gathering questionnaire is displayed. Users should scroll down and complete the questions as appropriate.

▲ Questionnaires can be downloaded in Excel format by clicking the Excel (_icon. If a user chooses to complete the questionnaire in Excel format, they should reupload the completed document by using the Click or Drag to Add a file button.

When users are finished completing the requirements gathering questionnaire click Submit.

After a respondent completes the questionnaire, it will appear in the solicitation admin’s Pending Validations. Log in to Ohio|Buys. In the main menu navigation bar, click Sourcing then Sourcing Projects.

Review the respondent’s answers. If edits or clarifications are needed, click Send back to Respondent.

If the answers are sufficient, click Approve.
UPLOAD AND MANAGE SOLICITATION DOCUMENTS

Overview

- **What’s Covered**: The process for uploading and managing documents for a solicitation in Ohio|Buys
- **Used When**: Setting up a solicitation in Ohio|Buys

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Step-by-Step Instructions for Uploading and Managing Solicitation Documents

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

The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters (▼) icon.

2. Open the sourcing project you would like to edit by clicking the Pencil (✎) icon.

3. Navigate to the Setup Documents tab.
In the **General Documents** section, certain State Documents that are standard across solicitations are displayed. To export these documents to a .zip file, click the **Checkbox** icon to the left of the documents you would like to export. Then click **Zip Selected Documents**.

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

Select a document type from the list provided.

**Document types include:**

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 – Assessment of 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
## Step-by-Step Instructions for Submitting a Hosted Catalog

### Pcard Purchase

#### Upload and Manage Solicitation Documents

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<td></td>
<td><img src="image" alt="Document Information Form" /></td>
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<tr>
<td></td>
<td><strong>a) Title:</strong> The name of the document.</td>
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<tr>
<td></td>
<td><strong>b) Summary:</strong> A description of the document contents.</td>
</tr>
<tr>
<td></td>
<td><strong>c) Status:</strong> Whether the document has been approved, drafted, blocked, or requires approval.</td>
</tr>
<tr>
<td>9</td>
<td>**Click <strong><a href="#">Click or Drag to add files</a></strong> to upload a document.</td>
</tr>
<tr>
<td>10</td>
<td>**Select a document from your PC and click <strong><a href="#">Open</a></strong> to upload it.</td>
</tr>
<tr>
<td>11</td>
<td>**Click <strong><a href="#">Save &amp; Close</a></strong> to upload the document</td>
</tr>
</tbody>
</table>
To manage a document once it has been uploaded:

1. Click the **Pencil** ( Educação ) icon to edit the document information.
2. Click the **Trashcan** ( Lixo ) icon to delete the document.
3. Click the **Checkbox** ( Caja de selección ) icon to select a document, then click **Zip Selected Documents** to export them to a .zip file.

Repeat steps 6-12 as needed until you are finished uploading solicitation documents. When you are finished, click **Save & Close**.
COMPLETE THE PREPARE A SOLICITATION TAB

Overview

- **What's Covered**: The process for completing the Prepare Solicitation tab of a solicitation in Ohio|Buys
- **Used When**: Setting up a solicitation in Ohio|Buys

<table>
<thead>
<tr>
<th>Creating and Preparing Solicitations</th>
<th>Simple Solicitation</th>
<th>Single Envelope</th>
<th>Double Envelope</th>
<th>Triple Envelope</th>
<th>Public Notice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete the Prepare a Solicitation Tab</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Step-by-Step Instructions for Completing the Prepare a Solicitation Tab

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

The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

▲ You can also search for projects based on a variety of filters including Commodity, Workflow Status, Contact, Supplier, Contracting Entity, Participating Organizations, Index, Rfx Type, Solicitation Status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (▼) icon.

2. Open the sourcing project you would like to edit by clicking the **Pencil** (✍) icon.

3. Navigate to the **Prepare Solicitation** tab.
a) Select the **RFx Type** from the drop-down menu – the available RFx types will vary depending on the type of sourcing project you selected. RFx types include:

1) RFI: Request for Information, aimed at obtaining information about the capabilities and offerings of various Suppliers

2) RFQ: Request for Quote, aimed at getting a quote from Suppliers

3) ITB: Invitation to Bid, aimed at obtaining responses from invited Suppliers

4) RFP: Request for Proposal, aimed at obtaining responses from Suppliers for specific statements of work or specifications

5) IFP (DAS only): Invitation for Proposal, aimed at obtaining responses from pre-qualified Suppliers for specific statements of work or specifications

6) Quick Quote: A simple solicitation for a specific need

7) Public Notice: Notice of a solicitation process occurring outside of Ohio|Buys

8) Reverse Auction (DAS only): A means of awarding a single envelope solicitation via an auction process

b) If needed, update the **Solicitation Name**. At a bare minimum, this field should include a description of what the solicitation is for 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 at which the solicitation will be available for Suppliers to respond to.
On the **Prepare Solicitation** tab:

**RFx Settings**
- **Status**: Draft
- **Workflow Status**: Draft
- **RFx Type**: Invitation To Bid (ITB)
- **Inquiry Period**: Specify the dates during which Suppliers can ask questions about the details of the solicitation.
- **Enable for Public Posting**: Specify 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. However, if subsequent changes are made to the Open and Closure Dates, the Public Posting Dates will need to be manually updated to match.

**Commodity Suppliers**
- **Suppliers Notified**: Specify whether suppliers are notified.
- **Advanced Options**
  - Suppliers must sign a Non-Disclosure Agreement
  - Public/Opportunity
  - Sealed bids
  - Require suppliers to respond to RFx Invitation
  - The RFx must have at least one line with an item
  - Check the presence of a subtotal column grid
  - Suppliers asked in a list, not in a grid
  - Suppliers can partially bid

**Process**
- 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)

**Summary**
- 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.
In the **Advanced Options** section you can indicate a number of additional pieces of information about your solicitation. Note that the advanced options that are available will vary depending on the type of RFx that is being conducted.

1) **Suppliers must sign a Non-Disclosure Agreement (NDA)** – Requires that the Supplier submit a signed NDA prior to viewing the RFx details

2) **Publicly Post Opportunity** – Posts the solicitation to the public portal, be sure to uncheck this option when seeking clarifications from a Bidder or Supplier who has already submitted a response as a part of a new lot

3) **Sealed Bids** – Responses from Bidders and/or Suppliers are sealed and must be individually opened (New functionality for this release)

4) **Require Suppliers to respond to RFx invitation** – Suppliers must indicate their intent to participate – Beginning with Release 3, State users no longer have the ability to input responses on behalf of Bidders and/or Suppliers (i.e., Bidders and/or Suppliers must submit their own responses in Ohio|Buys).

5) **The RFx must have at least one grid with an item** – Uncheck this box only if the solicitation will contain no items

6) **Check the presence of a total column grid** – Confirms that the Item Grid contains all of the necessary columns

7) **Suppliers answer in a form, not in a grid** – Has Suppliers respond in a written form rather than completing an item grid

8) **Suppliers can partially bid** – if checked, allows Suppliers to submit responses for some, but not all items in the item grid

9) **Allow multiple total columns (but only one per grid)** – Allows users to mark multiple columns as total columns across multiple item grids – however each individual grid may only have one total column

▲ For more information on creating and editing columns please refer to [Setup a Solicitation item Grid](#)

6 Click **Save**.

[Return to Navigation Page](#)
Setup Mandatory, Technical and/or Financial Questionnaires for a Solicitation

<table>
<thead>
<tr>
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<th>Double Envelope</th>
<th>Triple Envelope</th>
<th>Public Notice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup Mandatory, Financial, and/or Technical Questionnaires for a Solicitation</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
</tbody>
</table>

Overview

- **What’s Covered**: The process for adding questionnaire questions to a solicitation in Ohio|Buys either by uploading a template or by creating questions individually
- **Used When**: Adding questionnaires to a solicitation in Ohio|Buys
Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

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

2. The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

   ▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters ( ▼ ) icon.

3. Open the sourcing project you would like to edit by clicking the Pencil ( ✏️ ) icon.

4. Navigate to the Prepare Solicitation tab.
5 Click on either the **Mandatory Questionnaire**, **Financial Questionnaire** or **Technical Questionnaire** tabs as applicable.

▲ For Simple Solicitations a generic Questionnaire tab is visible. The process for completing this tab is the same as a Mandatory, Financial, or Technical questionnaire.

6 To set up a questionnaire based on an existing questionnaire template, click **Add Questionnaire Template**.

   a) The Configure Questionnaires window is displayed. Search for a template by typing in Keywords, the Contracting Entity, or a Commodity. Then click **Search**.

   b) Click the **Checkbox** ( □ ) icon next to the template you want to use.

   c) Click the **X** icon to close the Configure Questionnaires window.

   d) Click **Save**.

7 To add 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.
You can also upload a questionnaire in the format of an Excel spreadsheet.

a) Click the Excel icon to download the questionnaire Excel template.
b) To upload the spreadsheet select Click or Drag to add a file, navigate to the file on your computer, and press Open.

Navigate to the Mandatory Evaluation Questionnaire, Financial Evaluation Questionnaire or Technical Evaluation Questionnaire tabs as applicable.

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%. Please refer to the following example:

Example: If Question 1 and Question 2 were both twice as important as Question 3, they would have a weighting of 2, while Question 3 would have a weighting of 1.

<table>
<thead>
<tr>
<th>Question</th>
<th>Weighting</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question 1</td>
<td>2</td>
<td>40%</td>
</tr>
<tr>
<td>Question 2</td>
<td>2</td>
<td>40%</td>
</tr>
<tr>
<td>Question 3</td>
<td>1</td>
<td>20%</td>
</tr>
</tbody>
</table>

Select the Scoring Mode (e.g., Numeric) and a Scoring Type (e.g., Stars) for each question.
Assign evaluators in the **Default Responder Rules** section.

1) **Or**: In this field, select **Sourcing Responsible** from the drop-down menu.

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

Click **Save**.

Note that the process for uploading questionnaires is the same regardless of whether the questionnaire is mandatory, technical, or financial.
INVITE POTENTIAL BIDDERS AND/OR SUPPLIERS TO RESPOND TO A SOLICITATION

Overview

- **What's Covered**: The process for inviting Suppliers to respond to a solicitation in Ohio|Buys
- **Used When**: Identifying potential respondents to a solicitation

<table>
<thead>
<tr>
<th>Creating and Preparing Solicitations</th>
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<th>Triple Envelope</th>
<th>Public Notice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invite Potential Bidders and/or Suppliers to Respond to a Solicitation</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
 Invite Potential Bidders and/or Suppliers to Respond to a Solicitation

Step-by-Step Instructions for Inviting Bidders and/or Suppliers to a Solicitation

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

   The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

   ▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters ( ) icon.

2. Open the sourcing project you would like to edit by clicking the Pencil ( ) icon.

3. Navigate to the Add Suppliers tab.
If applicable, indicate the Parent Contract for the solicitation. This will automatically add all Suppliers associated with the Contract to the list of invited Suppliers.

▲ This is most commonly used when a contract has already been awarded to a pool of pre-qualified suppliers, and secondary solicitations amongst those suppliers are required before a purchase can be made.

Inviting Suppliers gives the Supplier the ability to see the solicitation and respond when they log into the application. Suppliers not invited will have to locate the solicitation on the public portal first and click the Participate in RFx button to gain access to it. Beginning with this release, Ohio|Buys will automatically notify all Bidders and/or Suppliers who have a commodity on their profile that is in the same category as the commodity or commodities listed on the solicitation.

▲ Note that while commodity Suppliers are notified, they are not all invited to participate in the solicitation.

Click the Selector (    ) icon on the Select Suppliers field. By default this drop-down will display all of the Bidders and Suppliers who have set their account up with the relevant commodity code(s) in Ohio|Buys. To add additional Bidders and/or Suppliers, click See All.

After clicking See All, a list of potential Bidders and/or Suppliers is displayed. By default this list will be filtered to only show Bidders and/or Suppliers who offer the commodity for your solicitation. Users can refine this search using different filters such as Keywords, Commodities, Dealers, etc.

▲ By default Ohio|Buys will filter the Bidders / Suppliers you see by the commodity code associated with the line item. To see additional Bidders and/or Suppliers, or Bidders / Suppliers who have not set their accounts up with that commodity code in Ohio|Buys, you will need to clear the commodity filter. To do this, click the X icon next to the commodity name in either the Commodities field, or the filter. Then click Search.

▲ Please note, Ohio|Buys requires the selection of at least 1 Bidder or Supplier. If the user would like to not select any individual Bidders and/or Suppliers, search for the Supplier ID associated with the contracting entity (e.g., DAS01) in the Keywords field and select this Supplier in the search results; in order to do this, the chosen supplier record must have a contact associated with it. Doing so will fulfill the requirement to invite at least 1 Supplier.
Invite Potential Bidders and/or Suppliers to Respond to a Solicitation

Step-by-Step Instructions for Inviting Bidders and/or Suppliers to a Solicitation

6

Click the Checkbox ( ) icon to select a particular Bidder or Supplier or click the Checkbox ( ) icon next to the Code header to select all of the displayed Bidders and/or Suppliers.

To modify the list of added Bidders and/or Suppliers:

7

a) Use the Trashcan ( ) icon to remove a Bidder or Supplier from the list of invited Bidders and/or Suppliers

b) Update the Main Contact field with the name of the Bidder or Supplier contact that should receive the invitation to respond – note that the Bidder or Supplier must have a contact in Ohio|Buys to be invited to participate in the solicitation

c) Use the Invited checkbox to determine whether or not a Bidder or Supplier on the list should be invited to respond to the solicitation

8

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.
DEFINING PREFERENCE FACTORS

Overview

- **What’s Covered**: The process for defining preference factors in Ohio Buys
- **Used When**: Defining preference factors in an ITB RFx
Step-by-Step Instructions for Defining Preference Factors for a Solicitation

In certain solicitations, the State of Ohio is required to apply preference factors to solicitations (e.g. Buy Ohio, Buy America). These preference factors are applied at item level, where the sourcing team must analyze whether it is worth it to pay more for a given product if it is made in Ohio or the U.S.

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

2. In the Keywords field, search for the solicitation that you would like to edit and select the Pencil (📝) icon next to the project.

Navigate to the Prepare Solicitations tab.

3. Confirm the RFx Type field is equal to Invitation to Bid (ITB).
Step-by-Step Instructions for Defining Preference Factors for a Solicitation

5. Complete the remaining mandatory fields, then click the **Create from Template** button.

6. Remove the Commodity and Organization filters by selecting the x (✓) icon next to each value. Then click **Search**.

7. Click the radio button next to option that has a **Solicitation Name** of “Preference Factors”.

<table>
<thead>
<tr>
<th>RFx Type</th>
<th>Lot #</th>
<th>Round #</th>
<th>Solicitation Name</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cancellation</td>
<td>1</td>
<td>1</td>
<td>Cancellation template</td>
<td>4/13/2020</td>
<td>4/22/2020</td>
<td>Draft</td>
</tr>
<tr>
<td>Invitation To Bid (ITB)</td>
<td>1</td>
<td>1</td>
<td>Preference Factors</td>
<td>7/9/2020</td>
<td>7/10/2020</td>
<td>Under Evaluation</td>
</tr>
</tbody>
</table>

8. Click the **Create** button.

   ▲ A pop up window will appear. Click the **Continue** button.

9. The **Items** tab will be updated with columns added for preference factors. Continue to the next section of the learner guide for instructions on how to complete the Item Grid.

   ▲ If applying preference factors, please complete this process **prior** to setting up your item grid.
SETUP A SOLICITATION ITEM GRID

Overview

- **What’s Covered**: The process for setting up an item grid for a solicitation in Ohio|Buys
- **Used When**: Preparing a solicitation
Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

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

2. The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the **Keywords** search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

   ▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (▼) icon.

3. Open the sourcing project you would like to edit by clicking the **Pencil** (✎) icon.

4. Navigate to the **Prepare Solicitation** tab.
Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

Navigate to the **Items** tab.

Click **+ Add Grid** to add a section to the Item Grid.

The Grid Browse page is displayed.

a) Users can search for an existing item grid using the Keywords search. Once you have identified the item grid you would like to use, click the **Checkbox** ( ) icon.

b) To create a new grid, click **Create Grid**

1) Enter the **Grid Name**.
2) Indicate in the **Grid Type** field whether this is a main grid or a grid with a parent. If it is a grid with a parent, select it in the **Parent Grid** field.
3) Write a **Description** of the item grid.
4) Click **Save & Close**.
Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

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

If necessary enter the **Code**, **Type**, **Label**, **Parent**, **Group(s)**, and/or **Commodity** and then click **Save**.

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.

To remove existing columns, toggle the **Radio Button** (○) for that column header.
Step-by-Step Instructions for Setting Up an Item Grid for a Solicitation

To add a new column, click **Add a column**.

a) To add an existing column, select it in the **Column** field of the Select an existing column section.

![Select an existing column](image)

b) To create a new column:

1) Select a **Column Type** from the available list.
2) Type in the column **Code**. (e.g., QTY for quantity, AMT for amount, etc.)
3) Type the name of the column in the **Label** field.
4) Select the user responsible in the **Column completed by** field.
5) Indicate whether completing the column should be required.
6) Click **Save & Close**.

▲ Users can optionally complete the **Tooltip** field to provide a description of the information that should be included in the column.

▲ On the **Analysis & Advanced Settings** users can optionally indicate how the data contained in this column should behave when exported to a pivot table.

When you are finished setting up the item grid, click **Save & Close**.
SUBMIT A SOLICITATION FOR REVIEW AND APPROVAL

Overview

- **What’s Covered**: The process for submitting a solicitation for review and approval in Ohio|Buys
- **Used When**: Preparing to submit a solicitation for review and approval
Step-by-Step Instructions for Submitting a Solicitation for Review and Approval

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

   The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

   ▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters ( ) icon.

2. Open the sourcing project you would like to edit by clicking the Pencil ( ) icon.

3. Navigate to the Prepare Solicitation tab.

   Submit a Solicitation for Review and Approval
Be sure to review the following aspects of the solicitation:

1) Project Team: Ensure that the appropriate users who will need to contribute to, and approve, the solicitation have been added properly.

2) Solicitation Documents: Ensure that all correct and necessary documents have been uploaded to the solicitation under the correct header.

3) Prepare Solicitation: Ensure that the correct dates have been selected for both the open and close period and the public posting period. Review the Summary and Process fields to ensure that they contain enough detail. As a reminder, the Process field should outline the procedure that the State will use to determine who the contract will be awarded to, and the Summary field should outline the details of the need at a high level that a potential Bidder or Supplier could understand at a glance. See examples below:

<table>
<thead>
<tr>
<th>Summary</th>
<th>Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>The State is looking to expand its technological capabilities in the training and learning space. We are hoping to obtain a new virtual learning platform with which to engage our employees remotely when required.</td>
<td>The State will select the respondent that can provide a tool with at least 10 years of viability at the lowest cost and with an implementation duration of no more than 30 months.</td>
</tr>
</tbody>
</table>

If applicable, navigate to the questionnaire and questionnaire evaluation tabs to ensure that the correct questions are being asked, and the evaluation process has been set up correctly.

If applicable, review the item grid and ensure that preference fields are set up correctly.

4) Ensure that you have added all of the Bidders and/or Suppliers that you intend to invite to respond to the solicitation.

Click Submit. The solicitation will then be routed to any approvers that have been assigned. If no approvers have been assigned, it is ready to be posted.
REVIEWING AND APPROVING SOLICITATIONS

Topics

• Review and Approve a Solicitation
• Post a Solicitation
• Use the Sourcing Blog
Ohio|Buys Solicitation Reviewer Roles

There are three main types of reviewers that may review and act on a solicitation in Ohio|Buys. These roles are primarily sourcing project specific roles that must be assigned by the person responsible for the solicitation when setting up their team.

1. **Ad-Hoc Approvers**: Ad-hoc approvers are optional approvers assigned to review a solicitation for a purpose relevant to that specific solicitation.

2. **Posting Approvers**: Posting Approvers are optional approvers that review a solicitation prior to it being posted for Bidder and/or Supplier responses. If a Posting Approver is assigned, they will need to approve the solicitation prior to its release.

3. **HCM Supervisor**: If a Posting Approver’s review is indicated, the responsible user’s HCM Supervisor will also need to review and approve the solicitation prior to its release.
REVIEW AND APPROVE A SOLICITATION

Overview

- **What's Covered:** The process for reviewing and approving a solicitation for HCM Supervisors, Ad-hoc Approvers, and Posting Approvers in Ohio|Buys
- **Used When:** A solicitation requires review and approval before posting

▲ Note: Any role in Ohio|Buys may serve as a solicitation approver if they are set up for that role in the solicitation project team, or if they serve as an HCM supervisor to a user creating a solicitation.
Step-by-Step Instructions for Reviewing and Approving a Solicitation

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 **Activity** of HCM Supervisor Approval, Ad-hoc Approval, or Posting Approval, to quickly view and take action on any solicitation needing your approval. Once you have found the task you would like to open, click on the **Object** name.

The workflow for the solicitation is displayed. Completed steps are green, while in progress steps are in orange. To access and review the solicitation in detail, click the **Link** (🔗) icon next to the Solicitation Name.
The sourcing project is displayed, open to the Setup Project tab. HCM Supervisors, Ad-hoc Approvers, and Posting Approvers all have the capability to review and update most components of the sourcing project.

▲ Note: the Project Type field is locked and is unable to be adjusted. If this field needs to be updated, please reject the solicitation.

Review the details of the Setup Project tab, and make any necessary updates. If you make any updates, click Save.

Navigate to the Setup Team tab. Review the team and ensure that the correct roles have been assigned to the appropriate users. If there are users who should be included on the team but have been omitted, reject the solicitation back to the Sourcing Responsible user with instructions on how to update the team.

▲ If you would like an additional approver to review the solicitation at the same step in the workflow that you are currently completing, you will need to Forward them the solicitation from the Prepare Solicitation tab. Note that users must be on the project team to be forwarded a solicitation.
If you determine, based on the details of the solicitation, that an additional approver is required at your step in the workflow, navigate to the **Prepare Solicitation** tab and select the **Forward** button. All approver roles can forward a solicitation.

▲ Note that forwarding a solicitation is additive. This means that either you (i.e., the person who was originally assigned this solicitation) or the person you forward it to can approve it, and that once either person approves it the solicitation will move on. Note, however, that the forwarded solicitation will be removed from the forwarding user’s My Pending Validations. If the intent is to make someone else aware of the solicitation, but not to formally approve it in the system, the non-approver will need to provide any feedback comments outside of OhioBuys.

▲ Select the user that you would like to forward the approval to from the dropdown menu. Then click **Forward**.

▲ Only users with who are listed on the Setup Team tab with the same role can be forwarded a solicitation.
Step-by-Step Instructions for Reviewing and Approving a Solicitation

Navigate to the **Setup Documents** tab.

Review the various documents that have been added to the solicitation. Ensure that all of the documents you would expect to see based on your expertise are included in the solicitation.

Note that some documents contained on the Setup Documents tab will be posted publicly, and others will not. The following document types will be posted publicly if they are contained in the Setup Documents tab:

- Public Proposals
- Public Evaluation Documents
- Public Solicitation Documents

▲ Note that **all** documents contained on the Prepare Solicitation tab will be posted publicly

If there are documents that should be included but have been omitted, or documents have been miscategorized, reject the solicitation back to the Sourcing Responsible user with instructions on which documents to upload.
Navigate to the **Add Suppliers** tab.

Review the listed Suppliers to ensure all that should be invited have been. Note that there may be Suppliers not listed who will be notified. (e.g., all commodity Suppliers will be notified)

▲ If **Suppliers Notified** has been set to Yes on the Prepare Solicitation tab, all Suppliers who are registered to provide the relevant commodity or commodities will be notified of the solicitation. (Note: this will be automatically checked to yes and uneditable at round 1)

▲ If the MBE Set Aside slider is engaged only MBE eligible Bidders and/or Suppliers will be invited to participate in the solicitation.

▲ In the case of a two-phase solicitation be sure that the solicitation is tied to the correct Parent Contract and that the appropriate Suppliers have been pulled down.

If there are Suppliers that should be specifically notified but have been omitted, or Suppliers that have been included and should not have been, reject the solicitation back to the Sourcing Responsible user with instructions on which Suppliers to add or remove. (See Page 62)
Navigate to the Prepare Solicitation tab. Within the Prepare Solicitation tab, there are a number of section headers containing different information to be reviewed.

⚠️ Note that depending on the project type, not all of the headers pictured below will be visible on a given solicitation.

Be sure to review the following headers within the Prepare Solicitation tab:

a) Setup – Review the following sections of the Setup tab:

1) RFx Settings – Ensure that the correct RFx Type has been selected, the solicitation has been appropriately named, and that the Amendment Status is correctly set to Yes or No.

2) Open and Closure Dates
Step-by-Step Instructions for Reviewing and Approving a Solicitation

a) Setup (cont.)

3) Inquiry Period Dates

4) Enable for Public Posting Dates – In general, Public Posting Dates should match your solicitation’s Open and Closure dates. Please confirm your agency’s specific policies with your Agency Admin.

5) Commodity Suppliers – If set to Yes then all Suppliers who can provide the relevant commodity or commodities will be notified.

6) Advanced Options – Review and confirm that the correct options are checked or unchecked.

▲ Confirm that the Publicly Post Opportunity box is set correctly based on the contents of the solicitation. Additionally, confirm that this is deselected a new lot is being created to seek clarifications from a Bidder or Supplier who has already submitted a response.
7) **Process** – Confirm that a sufficiently detailed description of the State’s selection process has been provided. This will be visible publicly to interested Bidders and/or Suppliers.

8) **Summary** – Confirm that a sufficiently detailed Summary of the need has been provided. This should provide interested Bidders and/or Suppliers with a high-level overview of the sourcing need they will be applying to fulfill.

b) **Documents** – Note that all documents posted on the Prepare Solicitation tab will be available publicly to any interested Bidders and/or Suppliers.

▲ The Documents posted on the Prepare Solicitation tab should be reviewed with heightened scrutiny as compared to those on the Documents tab, given that they will be disseminated to prospective Bidders and/or Suppliers.
c) Financial Questionnaire – These questions constitute the Supplier’s cost proposal to the State. (Only visible on Double and Triple Envelope solicitations)

d) Financial Evaluation Questionnaire – Demonstrates the evaluation criteria and evaluators responsible for the questions in the Financial Questionnaire. (Only visible on Double and Triple Envelope Solicitations)

e) Mandatory Questionnaire – These questions focus on the minimum base requirements that a Supplier must meet in order to be further considered for a solicitation. (Only visible on Triple Envelope Solicitations)

f) Mandatory Evaluation Questionnaire – Demonstrates the evaluation criteria and evaluators responsible for the questions in the Financial Questionnaire. (Only visible on Triple Envelope Solicitations)

▲ For some solicitation types there will only be one general Questionnaire and Questionnaire Evaluation section.
▲ For more information on all evaluation questionnaire types, please refer to the Setup Mandatory, Technical and/or Financial Questionnaires for a Solicitation section
Step-by-Step Instructions for Reviewing and Approving a Solicitation

7

**g)** Items – The item grid tab displays the items that have been added for Bidders and/or Suppliers to respond for. If applicable, ensure that the correct columns have been added in order to evaluate preferences. (For more information please refer to the [Define Preference Factors for a Solicitation](#) and [Setup a Solicitation Item Grid](#) sections)

![Item Grid Tab](image)

**h)** Technical Questionnaire – These questions constitute the Supplier’s technical proposal to address the needs of the State. (Only visible in Double and Triple Envelope solicitations)

![Technical Questionnaire](image)

**i)** Mandatory Evaluation Questionnaire – Demonstrates the evaluation criteria and evaluators responsible for the questions in the Technical Questionnaire. (Only visible on Double and Triple Envelope Solicitations)

![Mandatory Evaluation Questionnaire](image)
Step-by-Step Instructions for Reviewing and Approving a Solicitation

After you have made any necessary updates to the solicitation, navigate to the Prepare Solicitation tab and click the **Approve** button to approve it and advance the solicitation in the workflow.

If the solicitation requires additional edits from the user responsible for the sourcing project, click **Reject**.

▲ If you reject a solicitation, you will be asked to type the reason for the rejection in a pop-up comment box. This will be sent along with the solicitation back to the user responsible for the solicitation.

Reason:

Reason **

[Reason field]

[Cancel] [Confirm]
POST A SOLICITATION

Overview

- **What’s Covered**: The process for posting a solicitation in Ohio|Buys
- **Used When**: A solicitation is ready to be posted and sent to invited Bidders and/or Suppliers
Step-by-Step Instructions for Posting a Solicitation

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

2. The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

   ▲ You can also search for projects based on a variety of filters including Commodity, Workflow Status, Contact, Supplier, Contracting Entity, Participating Organizations, Index, Rfx Type, Solicitation Status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters (     ) icon.

3. Open the sourcing project you would like to edit by clicking the Pencil (     ) icon.

4. Navigate to the Prepare Solicitation tab.
Step-by-Step Instructions for Posting a Solicitation

5

Click **Send**.

Select any relevant **Files to attach** and add any additional **Supplier Contacts** for each of the invited Suppliers.

6

Click **Send & Close**.

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

7

Click **Solicitation Posted**.

Click **OK**.

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

Topics
After a solicitation is posted in Ohio|Buys, agency users can:

• Create and Issue New Lots and Rounds
• Review Sourcing Activity
• Answer Supplier Questions
CREATE AND ISSUE NEW LOTS AND ROUNDS

Overview

- **What's Covered**: The process for creating new lots and rounds for a solicitation Ohio|Buys
- **Used When**: A solicitation takes place over the course of multiple lots or rounds
Step-by-Step Instructions for Creating and Issuing New Lots and Rounds

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

2. The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

   ![Keywords search field](image)

   ▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters icon.

3. Open the sourcing project you would like to edit by clicking the Pencil icon.

   ![Sourcing project details](image)

4. Navigate to the **Prepare Solicitation** tab.

   ![Prepare Solicitation tab](image)
Create and Issue New Lots and Rounds

Step-by-Step Instructions for Creating and Issuing New Lots and Rounds

5. Click **Other Actions** and select either **Create a new lot** or **Create a new round**.
   ▲ Once you have selected which you would like to create, the process for creating a new lot or round is the same.

6. If necessary, update the **Commodity** or the **Organization**. These fields both carry over from the original sourcing project.

   ![Commodity and Organization Selection](image)

7. Confirm the options that should carry over from the original RFx. You can also choose to leave a section blank, or populate the section with the default from the RFx type.

   ![Copy Options](image)
   ▲ Note that the **Setup Tab** selector will determine whether or not the Advanced Options from the original RFx carry over. Users should carefully consider whether to retain this field.

8. Click **Create**.

9. Click **Continue**.

   ![Warning Message](image)
Step-by-Step Instructions for Creating and Issuing New Lots and Rounds

A new lot or round has been created. Enter the reason for the new lot or round in the Summary field and make any necessary updates to the Open & Closure and Inquiry Dates. Update the Amendment field as necessary. In the Advanced Options section, if you are posting clarifications be sure that the Publicly Post Opportunity checkbox is unchecked. Then click Save.

Navigate to the Documents tab and upload any new amendment documents.

Navigate to the Confirm Invited Suppliers tab and select the Suppliers you wish to include in the new lot or round.

Continue to update the solicitation as necessary to capture the details of the new lot or round. When you are finished, click Submit.

▲ Please note that issuing a new round or new lot will retrigger the solicitation approval workflow.
# REVIEW SOURCING ACTIVITY

## Overview

- **What's Covered:** The process for reviewing sourcing activity in a solicitation in Ohio|Buys
- **Used When:** Reviewing Supplier activity on a solicitation they have been invited to and/or are participating in

<table>
<thead>
<tr>
<th>Managing Solicitations</th>
<th>Simple Solicitation</th>
<th>Single Envelope</th>
<th>Double Envelope</th>
<th>Triple Envelope</th>
<th>Public Notice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Sourcing Activity</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Step-by-Step Instructions for Reviewing Sourcing Activity

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

2. The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the **Keywords** search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

   ![Keywords search field](image)

   ▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** icon.

3. Open the sourcing project you would like to edit by clicking the **Pencil** icon.

4. Navigate to the **View Solicitation Activity** tab.
Invited and participating Bidders and/or Suppliers’ activity on the solicitation is displayed. The activity from different Suppliers is divided on the page according to the lots or rounds of the solicitation.

**Lot 1: NextGen eProcurement Solution Implementation and Supplemental Services RFP (Round 1)**

<table>
<thead>
<tr>
<th>Supplier Name</th>
<th>Email Logins</th>
<th>Email Login Date</th>
<th>Submitted Proposals</th>
<th>Declined</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROLTA ADVIZEX TECHNOLOGIES LLC</td>
<td>1</td>
<td></td>
<td>0</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>CAREWORKS TECHNOLOGIES</td>
<td>1</td>
<td></td>
<td>0</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>ACCENTURE</td>
<td>1</td>
<td></td>
<td>0</td>
<td></td>
<td>✔️</td>
</tr>
<tr>
<td>KPMG LLP</td>
<td>2 1</td>
<td>8/3/2020 6:18:31 PM</td>
<td>1</td>
<td></td>
<td>✔️</td>
</tr>
</tbody>
</table>

The bids are now available, (8/3/2020 6:20:04 PM by ROBINSON WILL)

5. **Email**: Indicates the number of emails that have been sent to the Bidder or Supplier in regards to the solicitation.

5. a) Email: Indicates the number of times that the Bidder or Supplier has logged into Ohio|Buys since being invited to the solicitation.

5. c) Last Login: Indicates the last time that the Bidder or Supplier logged into Ohio|Buys since being invited to respond to the solicitation.

5. d) Submitted Proposals: Indicates how many proposals the Bidder or Supplier has submitted in a given lot or round.

5. e) Declined: A checkbox that, if checked, indicates that a Bidder or Supplier has declined to respond to the solicitation.

5. f) Status: By default, indicates that the invited or participating Bidder or Supplier is authorized to participate in the solicitation. Users are able to click the Authorized (✔️) icon and choose to block a Supplier if appropriate. To reverse this decision, click the Blocked (🚫) icon that appears in its place.
ANSWER SUPPLIER QUESTIONS

Overview

- **What’s Covered**: The process for responding to Bidder and/or Supplier questions in the Inquiry section of a solicitation in Ohio|Buys
- **Used When**: Replying to Bidder or Supplier inquiry about a solicitation in Ohio|Buys

<table>
<thead>
<tr>
<th>Managing Solicitations</th>
<th>Simple Solicitation</th>
<th>Single Envelope</th>
<th>Double Envelope</th>
<th>Triple Envelope</th>
<th>Public Notice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answer Supplier Questions</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
When a Bidder or Supplier submits an inquiry, the user responsible for the solicitation will receive an email notification and can view the question. They then can “unlock” the question for edit by forwarding. They can forward to any teammate on the team.

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

The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** ( ) icon.

Open the sourcing project you would like to edit by clicking the **Pencil** ( ) icon.

Navigate to the **Inquiry** tab.
The Inquiries page is displayed. Users are able to search for specific questions using keywords. Click anywhere on a question line to open it.

The question is displayed. To respond to the question, a user must first click the Forward (➡️) icon.
Step-by-Step Instructions for Answering Supplier Questions

Update the Message Type to Public Response. Doing so will post the Supplier’s question publicly so that other Suppliers are able to see the State’s response. The user should then select themselves in the Recipients field.

▲ Clean up the Supplier’s question by removing any sensitive or identifying information, as well as correcting any mistakes in spelling or grammar. This will ensure that the question is clear when it is posted to the public.

Once the Supplier’s question has been cleaned up, click Send.

Navigate to the forwarded message and click the Reply (↩) icon.
Step-by-Step Instructions for Answering Supplier Questions

Ensure that the **Message Type** is set to Public Response. Indicate the **Recipients** of the response. You can choose both internal contacts on the project team and Supplier contacts.

▲ Select **All internal team members** to send a reply to all users in the team tab

Type the details of your response in the free text entry field. Use the **Click or Drag to add files** button to attach documents as necessary.

When you are ready, click **Send** to distribute your reply.

Click **Post Inquiry to the Public**. This will post publicly all of the questions and answers with the public response type.
USE THE SOURCING BLOG

Overview

- **What’s Covered**: The process for utilizing the Sourcing Blog functionality in Ohio|Buys
- **Used When**: Reviewing Supplier activity in regards to a solicitation they have been invited to respond to
Use the Sourcing Blog

Step-by-Step Instructions for Using the Sourcing Blog

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

The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters (     ) icon.

2. Open the sourcing project you would like to edit by clicking the Pencil (    ) icon.

3. The Sourcing Blog can be accessed from any tab within a solicitation in Ohio|Buys. To access the Sourcing Blog, click the Chat (       ) icon on the right side of any tab within the solicitation.

Note that the Sourcing Blog can only be seen and used by internal users and is not visible to Bidders or Suppliers.

4. The Sourcing Blog is displayed. The blog contains two tabs.

   a) Alerts/Messages – Users can write messages to be posted in the blog using the text entry field below. Messages can be posted to a tab, or sent to a specific contact by selecting them from the drop-down menu. Users are also able to add attachments as needed and can reply directly to messages from other users.
b) Notifications – Displays notifications of recent activity conducted on the solicitation, including who acted on it.

Users can subscribe to be notified directly of sourcing blog activity by clicking the **Subscribe (✉️)** icon.
ANALYZING AND AWARDING SOLICITATIONS

Topics

- Open Solicitation Responses
- Review Bidder Submitted Responses and Attachments
- Complete Response Evaluations
- Analyze Submitted Bids
- Create Award Scenarios and Award a Solicitation
- Award a Solicitation

The process for analyzing and awarding a solicitation will vary depending on the solicitation type. The process for most types of solicitations will take place directly in Ohio|Buys, and is documented in the following pages. However, in the case of a Public Notice solicitation, the solicitation analysis and awarding will take place outside of Ohio|Buys.
OPEN SOLICITATION RESPONSES

Overview

- **What's Covered**: The process for certifying and opening Bidder and/or Supplier responses to solicitations in Ohio|Buys
- **Used When**: Reviewing responses to a solicitation

<table>
<thead>
<tr>
<th>Analyzing and Awarding Solicitations</th>
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<th>Triple Envelope</th>
<th>Public Notice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Solicitation Responses</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Log in to Ohio|Buys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the **Keywords** search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** icon.

Open the sourcing project you would like to edit by clicking the **Pencil** icon.

▲ Note that certain solicitations must be certified by the Auditor prior to the evaluation process. If you are unsure if your solicitation needs to be reviewed by the Auditor, check the Workflow section of the Prepare Solicitation tab.

Navigate to the **View Solicitation Activity** tab and click on the **Lock** icon to unseal the responses. Click the **OK** button to confirm.
Step-by-Step Instructions for Opening Solicitation Responses

Navigate to the **Open Mandatory Envelope**, **Open Technical Envelope** or **Open Financial Envelope** tab. Please note that if your solicitation has both a technical and a financial envelope, you must first review the technical envelope, complete offer evaluations for the technical envelope, and then click the Validate (and open next envelope) button before you can view the financial envelope. If your solicitation has a mandatory, technical, and financial envelope, you must complete these steps with the mandatory envelope before moving onto the technical and financial envelope.

Click the **Proposal Hyperlink** to open it.

Review the details of the response. When you are finished, click the X icon.
Step-by-Step Instructions for Opening Solicitation Responses

If the Supplier’s response is acceptable, click **Accept Proposal** to certify it.

If the Supplier’s response does not meet the requirements for the solicitation, click **Reject Proposal**.

▲ Note that proposals only need to be accepted or rejected in this manner when conducting Double or Triple Envelope solicitations.
▲ Note that only the Sourcing Responsible user is able to accept or reject a proposal in Ohio|Buys.
Overview

- **What’s Covered**: The process for reviewing responses and attachments submitted for Ohio|Buys solicitations
- **Used When**: Reviewing responses to a solicitation
1. Log in to Ohio|Buys. From the Main Menu Navigation bar, click Sourcing and then select Sourcing Projects from the drop-down menu.

The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters (▼) icon.

2. Open the sourcing project you would like to edit by clicking the Pencil (✎) icon.

3. Navigate to the Open Mandatory Envelope, Open Technical Envelope, or Open Financial Envelope tab as appropriate. Note that they must be opened in the above order.
5. Click on the **Proposal** hyperlink to open it.

6. The questionnaire response is displayed. Review the answers to the questions as appropriate.

7. To review any attachments associated with the response, navigate to the **Proposal Info** tab.

8. Relevant documents to the component of the Supplier’s response are displayed. Click on the name of the document to download it.

9. When you have finished reviewing the response for that section, click the **X** icon to close it.
COMPLETE RESPONSE EVALUATIONS

Overview

- **What's Covered**: The process for reviewing responses and attachments submitted for Ohio|Buys solicitations and completing evaluations
- **Used When**: Evaluating responses to a solicitation

<table>
<thead>
<tr>
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<th>Public Notice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete Response Evaluations</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Complete Response Evaluations

Step-by-Step Instructions for Completing Response Evaluations

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

   The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

   ▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters (   ) icon.

2. Open the sourcing project you would like to edit by clicking the Pencil (✍️) icon.

3. Navigate to the Open Mandatory Envelope, Open Technical Envelope, or Open Financial Envelope tab as appropriate.

   ▲ Note that if the solicitation contains only one evaluation questionnaire, it can be found on the Review Award Results Tab. The process for evaluation is otherwise the same.
Click **Begin Evaluation**.

Navigate to the **RFx Evaluations** tab.

Responses to the solicitation are displayed. You are able to search for the response that you would like to evaluate by keywords, Supplier, evaluator, or status. When you have found the response(s) that you would like to evaluate, click the **Checkbox** icon and select **View & Score Evaluations** to open it.

Scroll down to the **Proposal Evaluation** section. Complete the evaluation by selecting a **Rating** from the drop-down menu for each question, as well as providing comments and attachments as appropriate.

Click **Submit Evaluations**.

Repeat this process for each response in the section. When you are finished evaluating all of the appropriate responses in an envelope, click **Close Envelope**.

Repeat this process for any remaining envelopes.

▲ Note that only Sourcing Responsible users are able to input these scores.
REVIEW RESPONSE EVALUATIONS

Overview

- **What's Covered**: The process for reviewing evaluations to Bidder and/or Supplier responses within Ohio|Buys as a non-scoring evaluator
- **Used When**: Reviewing evaluations of responses to a solicitation
Log in to Ohio|Buys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (     ) icon.

Open the sourcing project you would like to edit by clicking the **Pencil** (    ) icon.

Navigate to the **Open Mandatory Envelope**, **Open Technical Envelope**, or **Open Financial Envelope** tab as appropriate.

▲ Note that if the solicitation contains only one evaluation questionnaire, it can be found on the **View Solicitation Activity Tab**.
Click the hyperlink for the offer that you want to view.

Note that only Sourcing Responsible users are able to input scores for evaluations in Ohio|Buys.

The response is displayed. Review the details of the Bidder or Supplier’s response. You can view the responses to the questionnaire within Ohio|Buys, or you can download the responses to an excel spreadsheet by clicking Download in Excel Format.

When you have finished reviewing, click the X icon to close the proposal.

Navigate to the RFx Evaluations tab.

Click the Pencil (✏️) icon next to the proposal you would like to open.
Step-by-Step Instructions for Reviewing Response Evaluations

The evaluation is displayed. Click the Download in Excel 2007-2010 format (xlsx) link to download the evaluation to your computer.

Review the evaluation and then repeat this process for additional Bidders and/or Suppliers as necessary.
ANALYZE SUBMITTED RESPONSES

Overview

- **What's Covered**: The process of analyzing and comparing multiple responses to a solicitation in Ohio|Buys
- **Used When**: Preparing to award a solicitation

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<tr>
<td>Analyze Submitted Responses</td>
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Step-by-Step Instructions for Analyzing Submitted Bids

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

2. The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the **Keywords** search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

   ![Search filters](image)

   ▲ You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** icon.

3. Open the sourcing project you would like to edit by clicking the **Pencil** icon.

   ![Sourcing project](image)

4. Navigate to the **Analyze & Award** tab.
Step-by-Step Instructions for Analyzing Submitted Bids

You are able to search for proposals based on keywords, and filter based on their status.

Click the Checkbox ( ) icon next to each of the proposals you would like to analyze. Then click Compare Quotes by Item.

The Item Comparison window is displayed. Select the Item you would like to compare from the drop-down menu, then click Compare Proposals.

The responses for selected Suppliers for a particular item are displayed.

Complete this process as appropriate for all remaining items. When you are finished, click Save & Close.
Navigate to the **Price synthesis (Pivot)** tab.

Detailed information that holistically compares the proposals is displayed.

Best prices for a particular item will be highlighted in green. This data can also be exported to Excel for additional evaluation.
CREATE AWARD SCENARIOS AND AWARD A SOLICITATION

Overview

- **What’s Covered**: The process for creating and viewing award scenarios for a solicitation in Ohio|Buys
- **Used When**: Determining an award for a solicitation

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<tr>
<td>Create Award Scenarios</td>
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<td>✓</td>
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</tbody>
</table>
Step-by-Step Instructions for Creating Award Scenarios and Awarding a Solicitation

Note that the following process detailing award scenarios is optional. To award a solicitation without using scenarios, refer to the Award a Solicitation section. Note that the award created in this guide is a draft award. The winning Bidder and/or Supplier(s) are not notified.

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

The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters (CTR) icon.

2. Open the sourcing project you would like to edit by clicking the Pencil (CTR) icon.

3. Navigate to the Analyze & Award tab.
An Award Scenario provides a holistic view of the results of awarding a solicitation based on a specific set of criteria and parameters. Users can create multiple scenarios to review different possible outcomes based on prospective awarding situations (e.g., best price, best rating).

In the Scenarios field, select a scenario from the drop-down menu. You can also edit the name of an existing scenario by clicking the Pencil (✏️) icon, or add a new scenario by clicking the Plus (➕) icon.

Navigate to the Awarding tab.

▲ Note that utilizing and comparing award scenarios is optional.

a) If awarding based on a set of pre-determined criteria:

1) In the Select Strategy field, indicate the criteria to be used for awarding in this scenario.

Options include:

- Best Overall Bid – The cheapest bid
- Best Price on Each Line – The lowest price broken out by responses for each line item
- Best Rating – The highest scored bid according to conducted evaluations
- Best Spread Among 2 Bids – Used to discern between two Suppliers
- Best Spread Among 3 Bids – Used to discern between three Suppliers

2) Click Apply.
3) The Award Scenario will automatically update based on your selected criteria. Navigate to the bottom of the page and select an Award Justification from the drop-down menu and complete the Award Explanation field.

![Award Justification](image)

4) Click Save.

![Save Button](image)

The award scenario has been saved and can be compared against other scenarios.

b) If awarding a solicitation by other criteria, or if intending to begin negotiations with multiple Suppliers:

1) Update the Manually Award field to Yes.

![Manually Award](image)

2) Complete the Award All fields appropriately.

![Award All](image)

- Percentage – Awarding based on percentage
- Amount – Awarding based on dollar amount
- On Grid – Select the grid for the item(s) you intend to award to a particular Supplier
- For Proposal – Select the Supplier that you intend to give the award to for the purposes of this scenario
3) The Award Scenario will automatically update based on your selected criteria. Navigate to the bottom of the page and select an Award Justification from the drop-down menu and complete the Award Explanation field.

4) Click Save.

The award scenario has been saved and can be compared against other scenarios.

Depending on the Award procedure used in the scenario, the Bidder and/or Supplier responses will be displayed accordingly in the Response section at the bottom of the page.

Numbers colored in green indicate the lowest price either overall or for that line item. A green check mark (✓) next to an overall bid or line item indicates that Bidder or Supplier will be awarded using the logic dictated by the scenario.

▲ If the user wants to award the solicitation to the bid not currently selected, (e.g., a tie between two Suppliers) they can do so by clicking the unchecked bid.

▲ This can also be done at the line item level to award parts of a solicitation to multiple Bidders or Suppliers.
Repeat this process for all additional Award Scenarios as appropriate. When you have determined the scenario that best meets your needs, select it from the **Scenarios** drop-down menu.

Click **Recommend Award**.

A draft award has been created for the Bidders and/or Suppliers indicated in the chosen award scenario.

If utilizing the award scenario process outlined in this learner guide, the solicitation process is now complete. Users should refer to the Creating and Managing Contracts Learner Guide for additional information.
In the case that additional preference factors need to be analyzed (e.g., BuyOhio, Veteran-owned businesses) follow the process to manually award as outlined above. If a Bidder or Supplier is does not qualify as an Ohio Bid and is not VBE but is offering a domestic product users should add 5% to their offer. If a supplier if offering a foreign product we add 6% to their offer. Additional steps to complete this process are as follows:

1) Navigate to the **Price synthesis (Pivot)** tab.

2) On the table displayed below, click **Autoexcel**.

3) Locate the Manufacturing Location column and Amount columns for each Bidder or Supplier. Add a new column in the Excel file next to Amount.

4) Based on the manufacturing location column and additional information provided in the questionnaire, additional preferences can be applied utilizing a formula in your new column. (e.g., Amount * 1.05)

5) Apply this formula to all applicable items.

6) Once done, apply a SUM formula for each Bidder or Supplier’s proposal.

7) Save the file and return to Ohio|Buys

8) Navigate to the **Awarding** tab and click **Add an Item**.
9) In the **Item Details** page enter **Preference Factor Adjustment** in the **Label** field.

10) Apply the Sum from step 6 for each Bidder or Supplier as appropriate.

11) Click **Save**.
AWARD A SOLICITATION

Overview

- **What’s Covered**: The process for awarding a solicitation to a Bidder and/or Supplier(s) in Ohio|Buys
- **Used When**: Awarding a solicitation to a Bidder and/or Supplier(s) and not leveraging Award Scenarios
Step-by-Step Instructions for Awarding a Solicitation

Note that the award created in this guide is a draft award. The winning Bidder and/or Supplier(s) are not notified.

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

The Sourcing Projects page is displayed. On this page, you can enter a variety of search terms to search for your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, Rfx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters icon.

Open the sourcing project you would like to edit by clicking the Pencil icon.

Navigate to the Analyze & Award tab.
Click the **Trophy** (🏆) icon next to the Supplier that you want to award.

Click **Ok**.

Navigate to the bottom of the page and select an **Award Justification** from the drop-down menu and complete the **Award Explanation** field. After these fields have been completed, click **Save**.

This concludes the Solicitation Learner Guide. At this point, users would begin the contracting process by creating a new contract from this draft award. For more information, please refer to the Creating and Managing Contracts Learner Guide.
## Version Control

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