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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If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via email (OBM.SharedServices@OBM.ohio.gov) or phone (877-644-6771).
In This Document:

**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 to identify and contact Suppliers.

2) **Review and Posting:** Ohio|Buys allows for robust teaming capabilities when working on solicitations at nearly every step. Users can establish a 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 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.
Creating and Preparing Solicitations

<table>
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<tr>
<th>Task</th>
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<th>Double Envelope</th>
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Reviewing and Approving Solicitations

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Managing Solicitations

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Analyzing and Awarding Solicitations

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<td>Analyze Submitted Responses</td>
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<td>Create Award Scenarios</td>
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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**: Functionality that allows users to configure the items they want the Supplier to submit responses for when replying to the Solicitation. This is equivalent to a cost summary or price sheet.

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.

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.
Step-by-Step Instructions for Creating a Sourcing Project

1. Select the **Contracting Entity**. This field is typically the agency or group responsible for initiating the solicitation.

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

3. 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.

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

5. Use the **Market Type** field to indicate the type of Suppliers that will be involved in the solicitation.

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

7. Use the **Confidential Sourcing Project** to hide the sourcing project from users who do not have the appropriate scope (this is only available for DAS Contract Analysts).

8. Input the **Index Number** if there is one associated with the solicitation. An index number is a short contract designator, often represented by three letters 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.

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** (ynamics menu icon).

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

3. Navigate to the **Setup Team** tab.
Step-by-Step Instructions for Submitting a Hosted Catalog

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: 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

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</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.

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

Navigate to the **Project Schedule** tab.

▲ 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.**

Select the **Checkbox ( 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.
GATHER REQUIREMENTS FOR A SOLICITATION

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** (-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 on the end date.
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.
The different question types available are listed below:

- **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, and/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, answers to a question can be limited based on how the respondent has answered a prior question. All of the rules use “if/then” statements. (e.g., If [Q1] “Does your organization have experience with this process?” is equal to NO, then [Q2] “Please provide your additional qualifications.” Is mandatory.)
Step-by-Step Instructions for Gathering Requirements for a Solicitation

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

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.

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 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**.

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

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 Submitting a Hosted Catalog

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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 (_excel_icon_) 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.

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

18

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.

19

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
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 search terms to locate 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.

Upload and Manage Solicitation Documents
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** – Documents relevant to the need. This might include a project intake form, risk assessment, data assessment, etc.
5. **Public Proposals** – Responses to the solicitation that are publicly available – note that these will not be available until after responses have been received
6. **Public Solicitation Documents** – Relevant solicitation documents that are released to the public

▲ Note that the Public document types on this tab will only be made publicly available after the solicitation has been awarded and there is a signed contract associated with it. In order to make documents visible to responding Suppliers please make sure that they are included on Documents header of the **Prepare Solicitation** tab.
Update the document information by including:

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

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

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

Click **Save & Close** to upload the document.
To manage a document once it has been uploaded:

a) Click the **Pencil** (✏️) icon to edit the document information.

b) Click the **Trashcan** (🗑️) icon to delete the document.

c) Click the **Checkbox** (☐) 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
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.

2. The Sourcing Projects page is displayed. On this page, you can enter search terms to locate 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 **Prepare Solicitation** tab.
Complete the Prepare a Solicitation Tab

Step-by-Step Instructions for Completing the Prepare a Solicitation Tab

On the Prepare Solicitation tab:

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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 the solicitation that will be understandable to Bidders and/or Suppliers unfamiliar with the State. Please avoid using acronyms.

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

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

- **e)** Indicate the **Inquiry Period** – these are the dates during which Suppliers can ask questions about the details of the solicitation.

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

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

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

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

▲ If the solicitation has been created from a purchase requisition, the contents of the Request Description field will automatically populate in the Summary field. This field can be edited as appropriate.

▲ In order to ensure all documents uploaded by Suppliers can be pulled into the contract record automatically, it is recommended that users instruct Suppliers to upload a copy of **all** documents submitted as part of their response to their response header. These instructions can be captured in the **Summary** section.
In the Advanced Options section you can indicate a number of additional pieces of information about the 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.

▲ If the Publicly Post Opportunity checkbox is disengaged, please also update the Notify Commodity Suppliers selector to No.

▲ While checked by default, the Publicly Post Opportunity checkbox can be disengaged for all Triple Envelope solicitations. Note: this is not checked by default for IFP solicitations.

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

2) **Require Suppliers to respond to RFx invitation** – Suppliers must indicate their intent to participate – Moving forward, 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).

3) **The RFx must have at least one grid with an item** – Uncheck this box only if the solicitation will contain no items (e.g., using a specialized item sheet stored in Excel).

▲ This checkbox is only available for the following RFx types: IFP, ITB, RFI, RFP, RFQ

▲ This checkbox is unchecked automatically for all solicitations with the IFP RFx type

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

2) **Suppliers answer in a form, not in a grid** – Requires Suppliers to respond in a written form rather than completing an item grid.

3) **Suppliers can partially bid** – Allows Suppliers to submit responses for some, but not all items in the item grid.

4) **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
Step-by-Step Instructions for Completing the Prepare a Solicitation Tab

6. Click **Save**.

7. Navigate to the **Documents** header on the **Prepare Solicitation** tab.

8. Indicate which documents should appear on the RFx.

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

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

   - **[Template] RFx Excel answer form** – The item grid in Excel format
   - **Ad-hoc Solicitation Document** – A document specific to the relevant solicitation that does not fall under one of the other document types
   - **RFx Commercial Documents** – Reference documents that can be referred to on all State projects (i.e. documents pulled from the General Documents section of the Setup Documents tab, the RFP, etc.)
   - **RFx Technical Documents** – Technical documents related to the RFx

   b) Click **Attach Existing Documents** to select any documents already contained in the Setup Documents tab by clicking the **Checkbox** (□) icon to the left. After you have selected the appropriate documents, click **Save & Close**.

9. Click **Save & Close**.
 SETUP MANDATORY TECHNICAL AND/OR FINANCIAL QUESTIONNAIRES FOR A SOLICITATION

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. ▲ If you would like to complete your evaluation and award based on combined technical and cost score, please refer to the Appendix for details on how your questionnaires should be configured.

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 search terms to locate 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.
**Setup Mandatory Technical and/or Financial Questionnaires for a Solicitation**

**Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation**

**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 for 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.

▲ Note that by checking the **Question Scored** checkbox, an evaluator will have to assign a score to this specific question later on. If you are going to score the response holistically (e.g., just scoring "Supplier Qualifications") these boxes should be left unchecked.
Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

▲ If you create a question with the **Selector** question type, you will need to choose what kind of value the Supplier will respond with from a series of pre-configured lists. You should use the Selector question type for common lists of values. (e.g., Commodity, State, Language)

▲ If you create a question with the **List of Values** question type, you will need to input the values that Suppliers can choose from. Click **Add values** to begin creating a list.

Type in the first value in the **Possible Values** field. If you would like the question to be auto-scored, indicate the score you would like to associate with that selection in the **Scoring** field. You can also use the **Att.** checkbox to indicate that the respondent must submit an attachment if they choose that value, and the **Com.** checkbox to indicate that the respondent must provide a comment if they choose that value.

a) You can copy the list of values created on another question in the questionnaire by clicking the **Duplicate from template or question** field and selecting it from the dropdown menu.

b) You can choose whether you would like these values to be presented to the Supplier as Checkboxes, Radio Buttons, Buttons, or a Dropdown list. It is not recommended that you use the Stars option.

c) Click **+ New Line** to add another value.

When you have added all of the necessary values, click **Save & Close**.
Setup Mandatory Technical and/or Financial Questionnaires for a Solicitation

Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

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

- Click the Excel ( ) icon to download the questionnaire Excel template.
- 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.

### Scoring Modes

a) **Numeric**: The user will rank the answer on a scale of 1 to 5
   - **Scoring Types**:
     - **Enter Value**: The user will manually enter a score from 1 to 5
     - **Stars**: The user will assign a ranking from 1 to 5 stars in the Ohio|Buys UI

b) **Select Value**: The user will select from a pre-defined list of values
   - **Scoring Types**:
     - **Add Values**: By clicking on this field the user will be prompted to create a list of possible values. Users will type the text for the value in the **Possible Values** field and assign a score to the value. To add another value, users will click **+ New Line**.

▲ Users are able to choose how the values are displayed. Options include Dropdown List, Stars, Buttons, Radio Buttons, and Checkbox

▲ By clicking the indicated checkboxes, users can mandate that evaluators add an attachment, or provide a comment if they select a particular value.
Step-by-Step Instructions for Setting Up Questionnaires for a Solicitation

Users must assign the Sourcing Responsible as the evaluator 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.

▲ Any documents uploaded by Bidders and/or Suppliers as part of their questionnaire responses will not be automatically pulled into the contract record when making an award. Documents uploaded only to the questionnaire will need to be downloaded and manually added to the contract record at a later time.

▲ In order to ensure all documents uploaded by Bidders and/or Suppliers can be pulled into the contract record automatically, it is recommended that users instruct Suppliers to upload a copy of all documents submitted as part of their response to their response header.
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

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<thead>
<tr>
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<th>Single Envelope</th>
<th>Double Envelope</th>
<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>
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 search terms to locate 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.

4. Invite Potential Bidders and/or Suppliers to Respond to a Solicitation
Invite Potential Bidders and/or Suppliers to Respond to a Solicitation

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

5

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. Going forward, 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, only selected Suppliers are specifically 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 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 does not want to select any individual Bidders and/or Suppliers, search for the Supplier ID associated with the contracting entity (e.g., DAS01, DPS01, etc.) 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 fulfills the need to invite at least 1 Supplier.

▲ You can also filter your results to only show Suppliers with a Supplier Contact by toggling the Supplier Contact on File radio button.
Invite Potential Bidders and/or Suppliers to Respond to a Solicitation

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

Click the Checkbox (button) icon to select a particular Bidder or Supplier or click the Checkbox (button) 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:

a) Use the Trashcan (button) 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.

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.
## Define Preference Factors

### Overview

- **What’s Covered**: The process for defining preference factors in Ohio\|Buys
- **Used When**: Defining preference factors in an ITB RFx

<table>
<thead>
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<th>Public Notice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Preference Factors for a Solicitation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Define Preference Factors

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 United States.

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.

3 Navigate to the Prepare Solicitations tab.

4 Confirm the RFx Type field is equal to Invitation to Bid (ITB).
5. Complete the remaining mandatory fields, then click the **Create from Template** button.

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

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

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, which is a list of the items being sourced and information relevant to them, 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.

   The Sourcing Projects page is displayed. On this page, you can enter search terms to locate 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.

   ![Sourcing Projects page with search filters]

3. Navigate to the Prepare Solicitation tab.

   ![Prepare Solicitation tab]

   ![Solicitation details with setup project option]
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. This will add the new grid as a sub-grid on the same sheet as its parent. (i.e., two conjoined but separate item grids that can have different columns)
3) **Write a Description** of the item grid.
4) Click **Save & Close**.
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.

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 search terms to locate 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.

<table>
<thead>
<tr>
<th>Solicitation ID</th>
<th>Sourcing Project Name</th>
<th>Solicitation Type</th>
<th>Workflow Status</th>
<th>Commodity</th>
<th>Contracting Entity</th>
<th>Sourcing Step Shortcuts</th>
</tr>
</thead>
<tbody>
<tr>
<td>SRC00000000B14</td>
<td>MWK Sourcing Project Test</td>
<td>Triple Envelope</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. Navigate to the Prepare Solicitation tab.

▲ Prepare Solicitation

- Setup Project
- Inquiry
- Project Schedule
- Requirements Gathering
- Setup Documents
- Add Suppliers
- Open Technical Envelope
- Open Financial Envelope
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/or 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:

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 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.
Step-by-Step Instructions for Reviewing and Approving a Solicitation

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 cannot 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 allows 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 Ohio|Buys.

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 list of Suppliers to ensure it is accurate and complete. Note that there may be Suppliers not listed who will be notified, including all Suppliers who are set up to provide this commodity in Ohio\|buys.

▲ 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 cannot be edited 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.
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**
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, 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 the Publicly Post Opportunity box is set correctly based on the contents of the solicitation. Additionally, confirm that this is deselected if 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, especially given that they will be disseminated to prospective Bidders and/or Suppliers.
c) Financial Questionnaire – These questions address the Supplier’s cost proposal to the State. (Only visible on Double and Triple Envelope solicitations)

![Financial Questionnaire](image)

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

![Financial Evaluation Questionnaire](image)

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)

![Mandatory Questionnaire](image)

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

![Mandatory Evaluation Questionnaire](image)

▲ 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.
g) Items – The item grid tab displays the items that have been added for Bidders and/or Suppliers to respond to. 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)

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)

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)
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.
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 search terms to locate 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.
Complete the following steps on the displayed pop-up window:

a) Select the files you would like to attach to the invitation to bid email.
b) Confirm the Bidder and/or Supplier list.

⚠️ If a Supplier does not have a Supplier Contact in Ohio|Buys, you will need to deselect that Supplier by unchecking the checkbox to its left. You will need to contact the Supplier outside of Ohio|Buys.

c) Revise the email Subject and Text as necessary. Be sure to check off Send me a copy as this will make it easier to copy and paste the message text for any emails to Bidders and/or Suppliers sent outside of Ohio|Buys.
d) Click Send and Close to notify the selected Bidders and/or Suppliers and open the quick quote solicitation for responses. Note that once a quick quote is opened, it is also posted on the Ohio|Buys Public Portal.

⚠️ This means the solicitation is visible to all Suppliers regardless of whether or not they were invited to participate.
Click OK in both pop-ups that appear.

Once a solicitation is posted Suppliers will be able to access it from the public solicitation page. Before Suppliers are able to respond to the solicitation, they will be required to complete the following acknowledgement and then indicate if they will or will not bid. Supplier acknowledgements can be tracked on the View Solicitation Activity of a solicitation.
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
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 search terms to locate 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.
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.

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

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.

▲ 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.

Click **Create**.

Click **Continue**.
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**.

▲ Note that if you are creating a new lot, you should indicate whether or not the lot is a clarification using the **Is a Clarification** checkbox.

Navigate to the **Documents** tab and upload any new amendment documents.
Step-by-Step Instructions for Creating and Issuing New Lots and Rounds

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

13 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.

▲ Note that if a new lot or round is issued, Suppliers will need to resubmit their responses. Please ensure that this is communicated clearly to your participating Suppliers as appropriate. For instructions on how to quickly resubmit a response, please direct Suppliers to the Viewing and Responding to Solicitations Learner Guide.
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
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 search terms to locate 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.

<table>
<thead>
<tr>
<th>Solicitation ID</th>
<th>Sourcing Project Name</th>
<th>Solicitation Type</th>
<th>Workflow Status</th>
<th>Commodity</th>
<th>Contracting Entity</th>
<th>Sourcing Step Shortcuts</th>
</tr>
</thead>
<tbody>
<tr>
<td>SRC0000000814</td>
<td>MWK Sourcing Project Test</td>
<td>Triple Envelope</td>
<td></td>
<td></td>
<td>Livestock</td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Lot : 1 - MWK Exercise Setup (Round 1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under Evaluation - Open for bidding From: 10/5/2020 To: 10/26/2020</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Email Logs</th>
<th>Last Login</th>
<th>Items Quoted</th>
<th>Questions Answered</th>
<th>Submitted Proposals</th>
<th>Declined</th>
<th>Status</th>
<th>Comment</th>
<th>EOD Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 RAINQIN TESTER</td>
<td>2</td>
<td>10/5/2020 6:23:52 PM</td>
<td>5/6 (83%)</td>
<td>1/1 (100%)</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td>MBE</td>
</tr>
<tr>
<td>3M COMPANY</td>
<td>1</td>
<td>10/6/2020 2:17:47 PM</td>
<td></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>100 CONFERENCE</td>
<td>1</td>
<td></td>
<td></td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3 Results</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The bids are now available. (10/5/2020 6:26:12 PM by KAIZER Mike)

a) **Email**: Indicates the number of emails that have been sent to the Bidder or Supplier in regard to the solicitation.

b) **Logins**: Indicates the number of times that the Bidder or Supplier has logged into Ohio|Buys since being invited to the solicitation.

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

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

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

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.

g) **Comment**: Displays any comments associated with the Bidder or Supplier’s response.

h) **EOD Status**: Displays whether or not the Bidder or Supplier is registered as an MBE, VBE, or EDGE Supplier.
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
Answer Supplier Questions

Step-by-Step Instructions for Answering Supplier Questions

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.

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 search terms to locate 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 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.
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.
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.

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

11 Click **Save** and then 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
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 search terms to locate 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.

Vous pouvez également rechercher des projets en utilisant divers filtres comprenant la catégorie, le statut du flux de travail, le contact, le fournisseur, l’entité contractante, les organismes participant, l’index, le type de RFx, le statut de la sollicitation, ou si la sollicitation a été désignée pour le set-aside MBE. Pour accéder à d’autres filtres non illustrés, cliquez sur l’icône More Filters ( ).

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.
CANCEL A SOLICITATION

Overview

- **What's Covered**: The process for cancelling a solicitation in Ohio|Buys
- **Used When**: A user would like to cancel 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>Cancel a Solicitation</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Step-by-Step Instructions for Cancelling a Solicitation

1. If a solicitation needs to be cancelled, the user responsible for the solicitation must do so by creating a new round and utilizing the *Cancellation* RFx type.

2. Open the sourcing project that you intend to cancel in Ohio|Buys and navigate to the *Prepare Solicitation* tab.

3. Click on the *Other Actions* drop-down menu and select *Create a New Round*.

4. Update the *RFx Type* field to *Cancellation* and update the *Amendment* field to *Yes*.

5. Write any public notes associated with the cancellation in the *Summary* field.

6. Click *Submit*.

The cancellation will follow the same approval process as the original solicitation. Since there is no evaluation process, once all approvals are received the sourcing responsible user must click *Send* and then *Begin Evaluation* to push the solicitation into the cancelled status. Prior to clicking *Send*, please note that you must place the *Begin Date* at some point in the future. (i.e., if it is 1/1/2021 at 12:00:00 PM, the date must be at least 1/1/2021 at 12:01:00 PM) All originally invited Bidders and/or Suppliers as well as those who have already submitted a response will be automatically notified of the cancellation.
ANALYZING AND AWARDING SOLICITATIONS

Topics

- Open Solicitation Responses
- Review Bidder Submitted Responses and Attachments
- Complete Response Evaluations (Simple/Single Envelope)
- Complete Response Evaluations (Double/Triple Envelope)
- 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
Step-by-Step Instructions for Opening Solicitation Responses

1. After the response date closes, solicitations can be evaluated. 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 search terms to locate 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 and click **Begin Evaluation** to start the response evaluation process.

---

Begin Evaluation
Prior to opening solicitation responses, all DAS Office of Procurement Services, DAS Office of State Printing and Mail Services, and BWC solicitations will be submitted to the Auditor of State for certification. Prior to certification, the user responsible for the solicitation will be unable to unseal solicitation responses. Once certified by the Auditor of State, the individual who is responsible for the solicitation will receive an email notification notifying them the responses can be unsealed.

Under the **Sealed Bids** header on the Prepare Solicitation tab, click the **Lock (🔒)** icon.

Click **OK** in the pop-up window to unseal the bids.

**Sealed Bids**

The "sealed bids" option has been selected. All the bids will be available only after the bid due date and the sealed-bid opening session.

Do you really want to open sealed bids?

- **OK**
- **Cancel**
REVIEW BIDDER/SUPPLIER SUBMITTED RESPONSES AND ATTACHMENTS

Overview

- **What’s Covered:** The process for reviewing responses and attachments submitted for Ohio|Buys solicitations
- **Used When:** Reviewing responses to a solicitation
Step-by-Step Instructions for Reviewing Bidder/Supplier Responses and Attachments

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 search terms to locate 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. a) For a Single Envelope or a Simple solicitation, navigate to the View Solicitation Activity tab.

b) For a Double or Triple Envelope solicitation, first navigate to the Open Mandatory Envelope, then Open Technical Envelope, or Open Financial Envelope tab as appropriate. Note that they must be reviewed in the above order.
Click on the **Proposal** hyperlink to open it.

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

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

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

When you have finished reviewing the response for that section, click the **X** icon to close it.
When conducting a Double or Triple Envelope solicitation, the user must either accept or reject each response after reviewing it.

If the Supplier's response is acceptable, click **Accept Proposal** to validate it.

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

▲ Note that Single Envelope proposals do **not** need to be accepted or rejected in this manner.
▲ Note that Double and Triple Envelope proposals must be accepted and/or rejected individually for each envelope. Before a user can move on to the next corresponding envelope, they must complete the response evaluations for that envelope.
▲ Note that only the Sourcing Responsible user is able to accept or reject a proposal in Ohio|Buys.
COMPLETE RESPONSE EVALUATIONS (SIMPLE OR SINGLE ENVELOPE)

Overview

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

<table>
<thead>
<tr>
<th>Analyzing and Awarding Solicitations</th>
<th>Simple Solicitation</th>
<th>Single Envelope</th>
<th>Double Envelope</th>
<th>Triple Envelope</th>
<th>Public Notice</th>
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</thead>
<tbody>
<tr>
<td>Complete Response Evaluations (Simple/Single Envelope)</td>
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<td></td>
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</table>
Complete Response Evaluations
(Simple/Single Envelope)

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 search terms to locate 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 View Solicitation Activity tab.
Responses to the solicitation are displayed on the **Evaluation Follow Up** section. 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 **Questionnaire** section. Complete the evaluation as appropriate according to the question evaluation format, as well as providing any necessary comments and attachments.

Click the **X** icon to close the response when you are finished reviewing it. The **Score** column will automatically update with the score for that Supplier’s proposal.

Repeat this process for each response.

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

▲ If required, the Sourcing Responsible user may disqualify a Supplier by navigating to the **Bid follow-up** section, clicking the **Status** ( ) icon next to the Supplier's name, and clicking **OK** in the pop-up window that appears.
COMPLETE RESPONSE EVALUATIONS (DOUBLE OR TRIPLE ENVELOPE)

Overview

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

<table>
<thead>
<tr>
<th>Analyzing and Awarding Solicitations</th>
<th>Simple Solicitation</th>
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<th>Double Envelope</th>
<th>Triple Envelope</th>
<th>Public Notice</th>
</tr>
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<tbody>
<tr>
<td>Complete Response Evaluations (Double/Triple Envelope)</td>
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<td></td>
<td></td>
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</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 search terms to locate 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.

Users must order envelopes in the following order: Mandatory, Technical, and Financial. The number of envelopes will depend on what type of sourcing project was selected.
Step-by-Step Instructions for Completing Response Evaluations

5. Navigate to the **RFx Evaluations** tab.

6. 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.

7. Scroll down to the **Proposal Evaluation** section. Complete the evaluation as appropriate according to the question evaluation format, as well as providing any necessary comments and attachments.

8. Click **Submit Evaluations**.

9. Repeat this process for each response in the section. When you are finished evaluating all of the appropriate responses in an envelope as well accepting or rejecting each proposal in that envelope, click **Close Envelope**.

▲ Note that only Sourcing Responsible users can 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
Step-by-Step Instructions for Reviewing 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 search terms to locate 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. Open the sourcing project you would like to edit by clicking the Pencil (✍) icon.

4. a) For a Single Envelope or a Simple solicitation, navigate to the View Solicitation Activity tab.

b) For a Double or Triple Envelope solicitation, first navigate to the Open Mandatory Envelope, then the Open Technical Envelope, or Open Financial Envelope tab as appropriate. Note that they must be reviewed in the above order.
Step-by-Step Instructions for Reviewing Response Evaluations

5

Click the **Proposal 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.

6

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.

7

a) For a **Single Envelope** or a **Simple** solicitation, click the **Pencil (✏️)** icon next to the evaluation you want to view.

b) For Double or Triple Envelope solicitations, navigate to the **RFx Evaluations** tab. Then click the **Pencil (✏️)** icon for the evaluation you want to open.
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
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 search terms to locate 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 (𝑣) icon.

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

4. Navigate to the Analyze & Award tab.
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 comparing 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. The combined evaluation score for each proposal is displayed in the Rating row on this tab.
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

<table>
<thead>
<tr>
<th>Analyzing and Awarding Solicitations</th>
<th>Simple Solicitation</th>
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<th>Double Envelope</th>
<th>Triple Envelope</th>
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<tr>
<td>Create Award Scenarios</td>
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<td>✓</td>
</tr>
</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 search terms to locate 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 Analyze & Award tab.

4. Create Award Scenarios and Award a Solicitation
Create Award Scenarios and Award a Solicitation

Step-by-Step Instructions for Creating Award Scenarios and Awarding a Solicitation

5

An **Award Scenario** provides an overview 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.

6

Navigate to the **Awarding** tab.

7

▲ 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 decide between two Suppliers
   - Best Spread Among 3 Bids – Used to decide 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.

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 on converting the results of the solicitation into a contract in Ohio|Buys.
In the case that additional preference factors need to be analyzed (e.g., BuyOhio, Veteran-owned businesses (VBE)), 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 is offering a foreign product, 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

<table>
<thead>
<tr>
<th>Analyzing and Awarding Solicitations</th>
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<th>Double Envelope</th>
<th>Triple Envelope</th>
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</tr>
</thead>
<tbody>
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<td>Award a Solicitation</td>
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<td>✓</td>
<td>✓</td>
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</tr>
</tbody>
</table>
Step-by-Step Instructions for Awarding a Solicitation

Note that the award created using 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 search terms to locate 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.

   ▲ SRC00000000814  MWK Sourcing Project Test  Triple Envelope  • Livestock

3. 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**.

If your solicitation uses the Request for Quote (RFQ) or Quick Quote RFx type, you will need to move the solicitation from a Under Evaluation status into a Closed status. To do this, navigate to the **Prepare Solicitation** tab of the sourcing project and click **Approve**. Note that you will not be able to update the award after moving an RFQ or Quick Quote into a Closed status.

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.
Creating, Managing, and Awarding Solicitations

APPENDIX
In order to evaluate and award solicitations based on the combined technical and cost score, the Double Envelope Sourcing Project Type and the Request for Proposal (RFP) RFx Type are leveraged. In Triple Envelope instances, the mandatory questionnaire would contain disqualifying questions, but would not have a weighted score associated with it.

By default, Ohio|Buys will average the Technical and Financial Evaluation Scores and display this on the Price Synthesis section of the Analyze & Award tab. If your solicitation requires that the Technical and Financial Evaluation Scores are not evenly weighted (e.g., the Technical Score is worth 65%, the Cost Score is worth 30%, and MBE participation is worth 5%), please refer to the following steps on how to set up your sourcing project.

Prior to starting to create your Technical and Financial Questionnaires in Ohio|Buys, determine the weights you will be assigning to Technical Evaluation Score, Cost Score, and/or MBE participation. In this example, we will be assigning the following weights:

1. Technical Evaluation Score: 65% of the overall score
2. Cost Score: 30% of the overall score
3. MBE Participation: 5% of the overall score

As part of this calculation, take note of the weight of the Technical Evaluation Score as you will need to insert a placeholder evaluation question in your Financial Evaluation Questionnaire equal to that weight so the combined Technical and Financial Evaluation Score is correctly calculated. For this example, our Technical Evaluation Score is worth 65% and our Financial Evaluation Score is worth 35% (Cost Score + MBE Participation).

The RFP contains Item Grids, a Technical Envelope, and a Financial Envelope:

1. The Item Grid contain items (product or services) the State would like the Suppliers to bid on.
2. The Technical Envelope contains a Technical Questionnaire and an Evaluation Questionnaire. The Technical Questionnaire contains a list of questions allowing Suppliers to provide the proposal deliverables and other information required by the RFP. The Technical Evaluation Questionnaire allows the State evaluators to assess the proposals based on defined criteria. Each evaluation question, sub-section and section carries weights defined by the analyst.

Technical Questionnaire:

▲ In this example, there are four questions that make up the Technical Questionnaire. Since there is a corresponding scoring rubric for how these responses will be evaluated, none of these questions are individually scored.

Technical Evaluation Questionnaire:

▲ Enter the total weight of the Technical Evaluation Questionnaire in the Section Weight field. In this example, we have entered 65 and assigned scoring question weights of 10, 10, 15, 15, 15, and 15 for each component of the Technical Evaluation Questionnaire scoring rubric.
3. The Financial Envelope contains a questionnaire and an Evaluation Questionnaire. The Financial Questionnaire includes one placeholder question that allows all Suppliers to provide the same answer. The Financial Evaluation Questionnaire contains a Price Mark question that automatically calculates a score based on the Suppliers bids towards the item grids, and a question that automatically scores the placeholder question. The Price Mark question and placeholder question each carry weights defined by the analyst.

Financial Questionnaire:

▲ The placeholder question in this example is “Cost Summary Provided?” and the only answer a Bidder or Supplier can respond with is “Yes”. Having a placeholder question is required for the Financial Questionnaire if your solicitation requires that the Technical and Financial Evaluation Scores are not evenly weighted (e.g., the Technical Score is worth 65%, the Cost Score is worth 30%, and MBE participation is worth 5%).

Financial Evaluation Questionnaire:

▲ Enter the total weight of the Financial Evaluation Questionnaire (i.e., Cost Summary + MBE Status) in the Section Weight field. In this example, we have entered 35 and assigned scoring question weights of 30 to the Cost Summary Points scoring question and 5 to the MBE Status scoring question. We have also entered a weight of 65 in the “Cost Summary Provided?” placeholder question. In order to have the Financial Evaluation Questionnaire assign a score to a Bidder or Supplier’s submitted price, you are required to insert a Scoring Question that has a Scoring Mode of “Price mark.” A “Price mark” Scoring Question will automatically assign a numerical score between 0 to 5 based on the submitting Bidder or Supplier’s provided item grid responses.
Once the RFx is closed, the analyst first opens the Technical Envelope to evaluate the Supplier responses based on predefined criteria. A Technical score is calculated based on the weight assigned to each evaluation question, sub-section, and section. Once the evaluation on Technical Envelope is done, the analyst needs to accept proposals and close the Technical Envelope.

After that, the analyst opens the Financial Envelope and reviews the calculated scores based on Suppliers’ bids. The scores for the placeholder question should be the same across all Suppliers. The system also calculates a score for the Financial Envelope by taking a weighted average of the cost score and placeholder question score.

At last, the system calculates an overall score by taking the average of the Technical and Financial Evaluation Scores. This score is available on the Price Synthesis section of the Analyze & Award tab, allowing the analyst to make an award recommendation based on the score.
# Version Control

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<td>Added different section on single vs double/triple envelopes in reviewing/awarding</td>
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</tbody>
</table>
## Version Control

<table>
<thead>
<tr>
<th>Version</th>
<th>Publish Date</th>
<th>Summary of Updates</th>
<th>Pages Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1</td>
<td>3/16/2021</td>
<td>Added red asterisk to indicate mandatory Inquiry Dates fields. Added EOD Status to</td>
<td>31, 32, 65, 66, 74,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>RFX Activity and Analyze and Award tabs. Removed “Solicitation Posted” button steps.</td>
<td>79, 82, 92, 113</td>
</tr>
<tr>
<td>2.2</td>
<td>3/31/2021</td>
<td>Noted the ability to disengage Notify Commodity Suppliers when Publicly Post</td>
<td>33</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Opportunity is also disengaged</td>
<td></td>
</tr>
<tr>
<td>2.3</td>
<td>4/13/2021</td>
<td>Noted updates to the “RFx must have at least one item grid” checkbox. Noted the</td>
<td>33-34, 44</td>
</tr>
<tr>
<td></td>
<td></td>
<td>visibility of the non-blocking alert next to Supplier records when they do not have</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>any Supplier contacts.</td>
<td></td>
</tr>
<tr>
<td>2.4</td>
<td>5/10/2021</td>
<td>Updated tables to indicate that Inquriy can apply to Public Notice solicitations</td>
<td>5, 83</td>
</tr>
<tr>
<td>2.5</td>
<td>5/11/2021</td>
<td>Added note that Publicly Post Opportunity checkbox can be disengaged, added</td>
<td>33, 79-80</td>
</tr>
<tr>
<td></td>
<td></td>
<td>instructions on Is a Clarification checkbox</td>
<td></td>
</tr>
<tr>
<td>2.6</td>
<td>5/20/2021</td>
<td>Noted to State users that Suppliers must acknowledge T&amp;C before submitting a</td>
<td>74, 80</td>
</tr>
<tr>
<td></td>
<td></td>
<td>response, added a note about Suppliers needing to resubmit if there is a new round</td>
<td></td>
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<tr>
<td>2.7</td>
<td>6/8/2021</td>
<td>Noted that Summary will automatically populate with contents of Request Description if the solicitation was created from a PR. Noted the need to Close an RFQ or QQ by clicking Approve.</td>
<td>32, 126</td>
</tr>
<tr>
<td>2.8</td>
<td>7/22/2021</td>
<td>Added a note about instructing Suppliers to upload all documents as part of their Header in their responses in the Summary section. Added a note about documents and questionnaire responses. Added note that there is a radio button to filter by Suppliers with Supplier Contacts.</td>
<td>32, 41, 44</td>
</tr>
</tbody>
</table>