Step-by-Step Instructions for Creating an Exception

1. Log in to Ohio Buys. From any page in Ohio Buys, go to the main menu navigation bar, click on Suppliers, and then select Exceptions.

2. From the Exceptions page, click Create Exception.

3. Complete the following required fields under Exception Details. Required fields will be marked with a red asterisk:

a) Title – A name for the exception
b) Description – A detailed description of the exception
c) Exception Type – Describes whether the Exception is an issue with: Customer Service (used for both positive and negative exceptions), Delivery, Invoicing, Product, or Revenue Share (only used for negative exceptions, Revenue Share will be active in 2020)
d) Exception Sub Types – Varies based on exception type
e) Severity – High, Medium, or Low
f) Creation Date – By default this will populate with today’s date
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Specify the **Origin** of the exception, which describes who the exception is linked to.

a) An exception must be linked to a **Supplier**.

b) Exceptions can be more specifically tied to a **Contract**, **Sourcing Process**, **Order**, **Delivery**, **Invoice**, **Commodities**, and/or **Organizations** as appropriate.

- **Origin**
  - Supplier *
  - Contract
  - Sourcing Process
  - Order
  - Delivery
  - Invoice
  - Commodities
  - Organizations *

▲ As you fill in certain fields in the **Origin** section of your exception, others may auto-populate.
(e.g., after selecting a Contract, the Commodities associated with that Contract will auto-populate)

c) Select the **Organizations** impacted by the exception.

Click **Save**.

Review that the information contained in your exception is accurate.

▲ If you would like to send the exception to supplier for their input, click the **Supplier Input** checkbox.

When you are ready to submit it for approval, click **Submit**.

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