

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**.

The screenshot shows the Ohio Buys interface. At the top, there is a navigation bar with 'Suppliers' selected. Below the navigation bar, there is a search bar and a 'Create Exception' button highlighted with a red box. The page also shows various filters and a 'Search' button.

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

The screenshot shows the 'Exception Details' form. The form has several fields: Title, Creation Date, Description, Exception Type, Exception Sub Types, and Severity. Each field is marked with a red asterisk and a red letter (A-F) indicating it is a required field. The 'Creation Date' field is pre-filled with '6/3/2019'. There is also an 'Urgent Request?' checkbox.

3

- 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.

The screenshot shows a form titled "Origin" with several fields. The "Supplier" field is marked with a blue circle and the letter "A". The "Contract" field is marked with a blue circle and the letter "B". Below the "Contract" field are several dropdown menus for "Sourcing Process", "Order", "Delivery", "Invoice", "Commodities", and "Organizations".

4

- ▲ 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)

5

Click **Save**.



6

Review that the information contained in your exception is accurate. When you are ready to submit it for approval, click **Submit**.

