

Ohio | Buys

Connecting Buyers and Suppliers

Managing Contracts and Catalogs in Ohio|Buys

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Audience: Users responsible for managing contracts and product catalogs within Ohio|Buys.

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In This Document:

Overview: The State of Ohio's Department of Administrative Services (DAS) is responsible for the management of Supplier contracts. This process happens outside of Ohio|Buys and is complete once the contract is signed by the State and the Supplier.

This learner guide covers the activities related to:

- creating a new or amending an existing contract shell within Ohio|Buys
- importing a contract's associated price list
- making updates to hosted catalog items

Information related to punchout catalogs can be found in the last section of this document.

Overview of Processes Covered in this Guide:

- 1) Contract Shell Creation:** When a contract is signed and executed, its details should be added to a contract shell within Ohio|Buys. This shell contains important details related to the contract such as the Supplier's information, the start date of the contract, and the expiration date
- 2) Catalog Upload:** Ohio|Buys supports hosted catalogs (items available for purchase directly in Ohio|Buys) and punchout catalogs (items available for purchase on the Supplier's website). The Contract Analyst, Catalog Analyst, or the Supplier can create a hosted catalog using a data import process or by adding the item directly in the catalog. Suppliers are responsible for punchout catalogs which require a different set up process.
- 3) Contract & Catalog Maintenance:** Throughout the lifecycle of the contract, there may be a need to make edits to the contract or the items associated with it. Mass edits to a catalog can be done using a data import process. Edits to a contract or one-off modifications to items can be done directly within the Contracts menu within Ohio|Buys.



CREATING A CONTRACT SHELL

Overview

- What's Covered: This section walks through the process of creating a contract shell within Ohio|Buys
- Roles: Contract Analyst
- Used When: A contract is signed and a new shell needs to be created in Ohio|Buys

Step-by-Step Instructions for Creating a Contract Shell

1

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

2

In the General Information box, populate the mandatory **Contract Type** (e.g., Competitive Selection, Requisite Program) and the **Contract Sub-Types** fields (e.g., Enterprise Contract, Master Services Agreement) based on the executed contract.

- ▲ Please consult the table of Contract Types and Contract Sub-Types at the end of this section for an overview of the varying types and who can create each type of contract.

General information

Contract Type * Code

Contract Sub-Type *

Confidential

Status

Draft

3

a) In the Contract Header box, populate the mandatory **State Contract Number** field, the **Name** field with the name of the contract shell and the **Contracting Entity** field with a value from the drop-down menu.

- ▲ The contracting entity should reflect the agency or group responsible for initiating the contract. For state-wide contracts, this should be “DAS105000 General Services Division GSVC”

Contract header

State Contract Number *

1234

Name *

Test

Supplier

Contracting Entity * Contract Owner

State Agencies DAS

b) Populate the **Supplier** field with the Contractor's name associated with the contract shell. The hyperlink icon links to the Supplier's record in Ohio|Buys.

c) Enter a **Contract Owner**

- ▲ OIT contracts will affect the direction of the purchase requisition workflow for IT commodities.

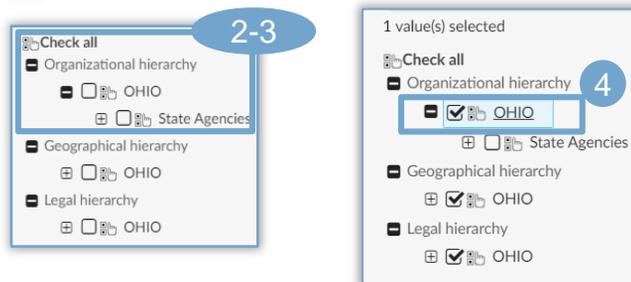
b) Populate the remaining non-mandatory fields as necessary (e.g., Market Type, Index Number, Minimum Contract Purchase Amount).

- ▲ For a complete list of contract fields, refer to the [Contract Field Guide](#) at the end of this document.

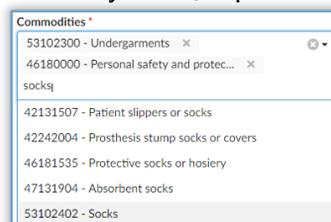
Step-by-Step Instructions for Creating a Contract Shell

In the Contract Scope box, choose the mandatory **Organizations** and **Commodities** field:

- a) **Organizations field:** Select the organization the contract is for, which determines the agencies and/or divisions that can order from the contract.
- 1) To most effectively choose the Organization, click the **Selector** (▾) icon and then select **See All**. A pop up will appear with the organizational hierarchy.
 - 2) Under Organizational Hierarchy, click the **Expand** (⊕) icon next to OHIO.
 - ▲ If you want to make the contract a statewide contract, click the **Checkbox** () icon next to OHIO.
 - ▲ If you would like to set up an agency-specific contract, click the **Expand** (⊕) icon to see the list of State Agencies.
 - 3) In this example, we want to select OHIO for a state-wide contract.
 - 4) Select the **Checkbox** () icon next to OHIO.
 - 5) Click the **X** (✕) icon once you have selected your organizations to move on.



- b) **Commodities field:** Indicate the commodities tied to the contract based on the scope of the contract.
- 1) To select the Commodities, type the code or description into the **Commodities** field and select the applicable commodity from the results displayed beneath the field.
 - ▲ If you are having trouble finding the correct commodity in Ohio|Buys, you can also visit the UNSPSC website (<https://www.unspsc.org/search-code>) to search for a commodity.
 - ▲ You can also follow the same steps used to complete the Organizations field to complete the Commodities field. However, when browsing the commodities list, either click the **Hand** (🖱) icon to select all values beneath the listed commodity or click the **Checkbox** () icon next to each commodity to select an individual or a few commodities.
 2. If you are selecting more than one commodity code, repeat step 1.



Step-by-Step Instructions for Creating a Contract Shell

In the **Validity** section, populate the mandatory **Original End Date** field with the original or initial contract end date.

- ▲ It is suggested to populate the **Effective Date** (i.e., the contract start date) and **Actual End Date** fields (i.e., the current contract end date). For more information on how to use these fields, refer to the [Contract Field Guide](#) at the end of this document.

5

The screenshot shows a form titled "Validity" with four date fields arranged in a 2x2 grid. Each field has a calendar icon to its left. The fields and their values are: "Signature Date" (empty), "Effective Date" (4/1/2020), "Original End Date*" (4/30/2021), and "Actual End Date" (4/30/2022). The "Actual End Date" field is highlighted with a blue border.

The **Review and Renewal Schedule** section contains information related to how Ohio|Buys should send out automatic communications related to renegotiating or terminating a contract. These fields also trigger status changes for the contract to let users know a contract is about to expire. Complete the fields that are applicable to your contract shell. For more information on how to use these fields, refer to the [Contract Field Guide](#) at the end of this document.

6

The screenshot shows a form titled "Renewal Types" with several fields: "Renewal Types" (a dropdown menu), "Renewal Period (months)" (with an information icon), "Renegotiation Date" (with a calendar icon), "Renegotiation Period (months)" (with an information icon), "Notification Date" (with a calendar icon and an information icon), "Notification Duration (months)" (with an information icon), "0 Result(s)" (a button), and "Termination Date" (with a calendar icon).

7

Click **Save**. Once you click Save, the following tabs on the left side of the page become visible: Contacts, Negotiated Terms, Documents, Price List, Workflow, Overview, Contract Tree View, D&R, and Dealers.

Step-by-Step Instructions for Creating a Contract Shell

Navigate to the **Contacts** tab to add Supplier and internal contacts:

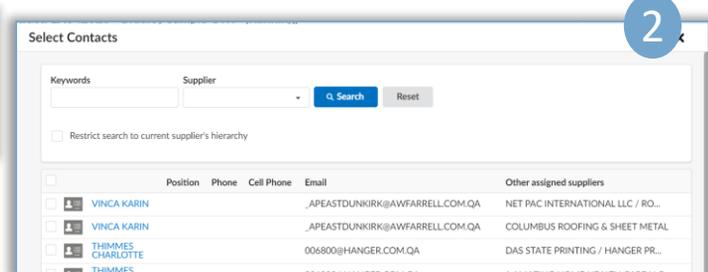
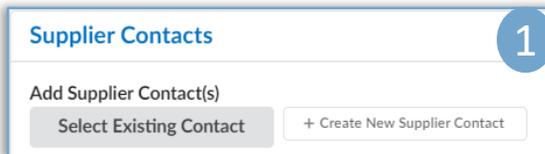
a) To add a Supplier contact:

1) Click **Select Existing Contact**

▲ If a Supplier contact does not exist in Ohio|Buys, please reach out to the Supplier and ask them to update their contacts.

2) Scroll to the relevant Supplier contact and click the **Checkbox** () icon next to their name. The Supplier contact has been added to the contract shell.

▲ You can also input a keyword in the Keywords field or select a Supplier from the Supplier field and then click Search to find a specific Supplier contact.



b) The “Internal team” lists all state employees that can be contacted to clarify the details of this contract. To add internal contacts:

1) Type the internal contact’s name in the **Select Team** field.

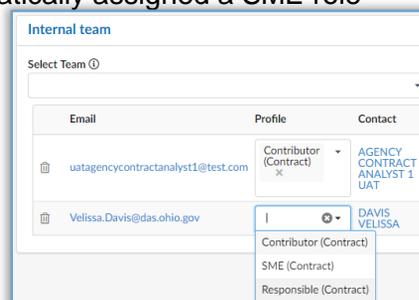
2) Select their name from the drop-down menu.

c) If you want to change an internal contact’s profile:

1) Click the **X** () icon in their current profile to first remove the assigned profile.

2) Click the **Selector** () icon and select the applicable profile from the drop-down menu:

- **Responsible:** They can view, modify, or delete the contract shell. Only one individual can have the Responsible role assigned to them. There must always be a user in this role.
- **Contributor:** They can view and/or modify the contract shell.
- **SME:** The Subject Matter Expert can only view the contract shell. New internal contacts are automatically assigned a SME role



Step-by-Step Instructions for Creating a Contract Shell

9

- a) To add a dealer associated with the contract shell, navigate to the **Dealers** tab and then click **Add Dealers**.
 - ▲ Dealers are authorized suppliers who can offer the State the items listed on the contract. For example, Lenovo would be the parent supplier or contractor on a contract, but a dealer would be a supplier that fulfills the purchase order for the State.
- b) Input the name of the dealer in the mandatory **Dealer** field.
- c) Select the applicable dealer from the relevant results.
- d) Populate the **Dealer ID** field as necessary.
 - ▲ The **Dealer ID** field is the State of Ohio's unique identifier for Suppliers. This field is not automatically populated.
- e) If you want to add another dealer, click **Save** and repeat steps b, c, and d.
- f) Once you finish adding dealers, click **Save & Close**.

10

Navigate to the following tabs and complete the necessary fields as they relate to the scope of the contract:

- Negotiated Terms tab: Populate terms associated with the contract (e.g., Payment, Price).
- Documents tab: Upload applicable documents or add electronic signatures.
 - ▲ Currently, this tab is not being used, but it will be in future releases.
- Price List tab: Populate the catalog items associated with the contract.
 - ▲ Please refer to the [Uploading a Hosted Catalog](#) section in this guide to create, edit, or delete items using the hosted catalog import process.
- Workflow tab: Review the approval workflow, approval history, and mail history.
- Overview tab: Provides an overview of the contract shell once it is submitted and approved.
- Contract Tree View tab: Displays a list of active related contracts and amendments.
- D&R tab: This tab does will not be completed during the creation of a contract shell. For more information on how to create a Determination & Recommendation, refer to job aid *04.01.01 Ohio Buys Create and Finalize a Performance Evaluation*.

For more information on how to use these fields, refer to the [Contract Field Guide](#) at the end of this document.

11

Once you have populated the mandatory fields and non-mandatory fields as necessary, click **Submit** to finish creating the contract shell.

Contract Types and Sub-Contract Types

Contract Type	Contract Sub-Type	Who Can Create This Contract Type?
Competitive Selection	<ul style="list-style-type: none"> a) Enterprise Contract b) Multi-Agency Contract c) Single Agency Contract 	<ul style="list-style-type: none"> • DAS Office of Procurement Services • DAS Office of State Printing and Mail Services
Competitive Selection-Two Phase	<ul style="list-style-type: none"> a) Enterprise Contract Pre-Quals b) Multi-Agency Contract Pre-Quals c) Single Agency Contract Pre-Quals d) Enterprise Contract Quote e) Multi-Agency Contract Quote f) Single Agency Contract Quote 	<ul style="list-style-type: none"> • DAS Office of Procurement Services
Waiver of Competitive Selection	<ul style="list-style-type: none"> a) Commercial Lease Agreement b) Master Cloud Services Agreement c) Master License Agreement d) Master Maintenance Agreement e) Master Services Agreement f) State Term Schedule-S&LG, GSA, DOD, or VA 	<ul style="list-style-type: none"> • DAS Office of Procurement Services (for all contract sub-types except for Commercial Lease Agreements) • DAS Office of Real Estate and Planning (only for Commercial Lease Agreements)
Agency Administered	<ul style="list-style-type: none"> a) Personal Service Agreement b) General Services Agreement c) General Goods Agreement d) Professional Service Agreement 	All State Agencies (excluding DAS Office of Procurement Services)
Requisite Program	<ul style="list-style-type: none"> a) DRC-Ohio Penal Industries (OPI) b) DAS-Community Rehabilitation Program (CRP) c) OOD-Business Enterprise Program d) DAS-Office of Information Technology (OIT) e) DAS-State Printing and Mail Services f) DMH-Ohio Pharmacy Services g) Ohio Facilities Construction Commission (OFCC) h) OFCC Local Agency Administered Agreement 	<ul style="list-style-type: none"> • Applicable Requisite Program (i.e. OPI, CRP, OOD-Business Enterprise Program, OIT, DAS-State Printing and Mail Services, DMH-Ohio Pharmacy Services, OFCC, OFCC)
Comparison	N/A	The purpose of this is to allow DAS to input items offered on punchout catalogs so price audits can be conducted to ensure pricing offered on punchout catalogs is consistent with contracted price.

You have now completed the steps for setting up a contract shell in Ohio|Buys. To upload the price list for that contract, refer to “[Uploading a Hosted Catalog](#)” for instructions on creating/updating a hosted catalog.

For instructions on creating a punchout catalog, refer to the [Addendum](#).

UPLOADING A HOSTED CATALOG

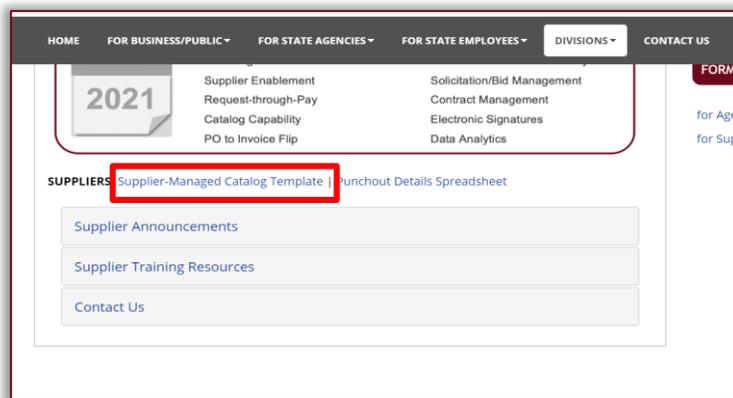
Overview

- What's Covered: Using a data import to create a new hosted catalog or perform mass edits to an existing hosted catalog
- Roles: Contract Analyst, Catalog Analyst, Supplier (covered in Supplier Learner Guide)
- Used When: A new hosted catalog needs to be created or there is a significant amount of updates needed to an existing hosted catalog

Step-by-Step Instructions for Exporting the Catalog Import Template

Prior to creating a data import for a hosted catalog, the Catalog Template should be downloaded. This document contains information to assist in completing the Excel file for the data import. For steps on how to download the Excel file used for the data import, refer to Step 5.

- a) Download the Catalog Template from the State website at <https://das.ohio.gov/Divisions/General-Services/Procurement-Services/eProcurement#5223484-supplier>



- b) Use this as a reference as you complete the Excel file downloaded for the data import. Do not use the Catalog Template to upload into Ohio|Buys. It is important to use the Excel file downloaded directly from Ohio|Buys to complete the data import for your hosted catalog.

Step-by-Step Instructions for Uploading a Hosted Catalog

Hosted Catalog

A hosted catalog (in Excel spreadsheet format) is uploaded by the Catalog Analyst or Supplier into Ohio|Buys and maintained by the State and the Supplier. State users looking for items can access a hosted catalog in Ohio|Buys, add items to their cart, and complete the requisition and ordering process.

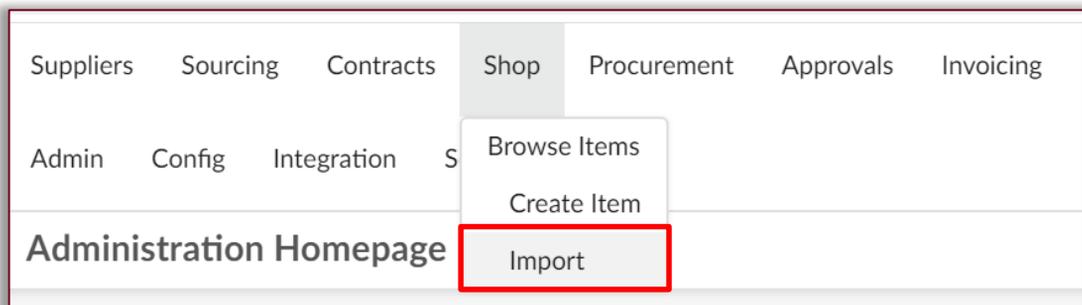
Hosted Catalog Setup Checklist

The items below should be gathered prior to initiating the data import for the hosted catalog. This will help minimize import errors and missing information as State users shop within Ohio|Buys.

- Gather all pictures into a zip file and note each in the Catalog Template
- Gather all the Material Safety Data Sheets (MSDS) into a zip file and note each in the Catalog Template if the catalog contains hazardous items
- Ensure the rest of the Catalog Template is complete, especially the mandatory fields. For more information on the template, refer to Step 4.

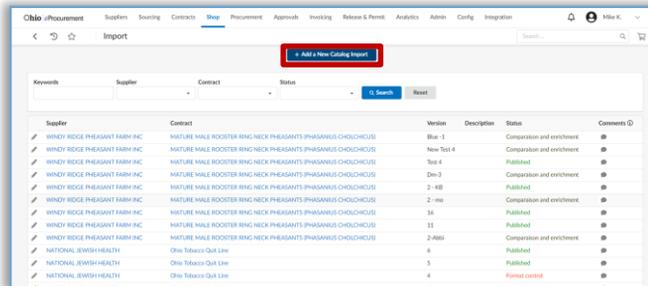
Log in to Ohio|Buys. From any page on the Ohio|Buys solution, go to the Main Menu Navigation Bar, click on **Shop**, and select **Import**.

1



Step-by-Step Instructions for Uploading a Hosted Catalog

On the Import page, click the **Add a New Catalog Import** button.



+ Add a New Catalog Import

a) On the Catalog Sheet page that appears, navigate to the section titled General Information and complete the mandatory and optional fields:

- Select the name of the **Supplier** connected to the catalog sheet
- Select the **Contract** associated with the Excel file or catalog sheet for this data import
- Input the **Version** of the catalog sheet
 - ▲ If the import is creating a new catalog, then type "1". If the import is updating an existing catalog, the version number will automatically populate.

General Information

Supplier *

Contract

Version

Import Type

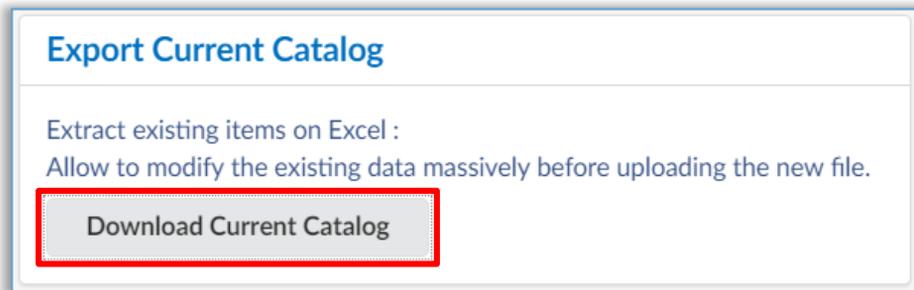
STD - Supplier catalog import

b) Once you have completed the mandatory and optional fields, click the **Save** button towards the top of the Catalog Sheet page.

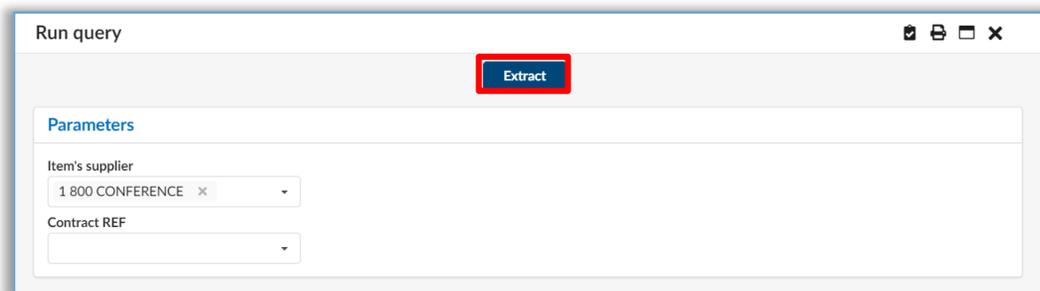
Save

Step-by-Step Instructions for Uploading a Hosted Catalog

- a) On the Catalog Sheet page, navigate to the box titled Extract Current Catalog and click the **Download Current Catalog** button.



- 4 b) A pop-up titled Run Query appears. The **Item's Supplier** field will automatically populate with the Supplier name chosen in Step 3. **Contract REF** can be used to select the reference number or OAKS ID for a specific contract. Click the **Extract** button and ensure the Excel (.xlsx) file was successfully downloaded to your computer. Click the **X (✕)** icon to close the pop-up.

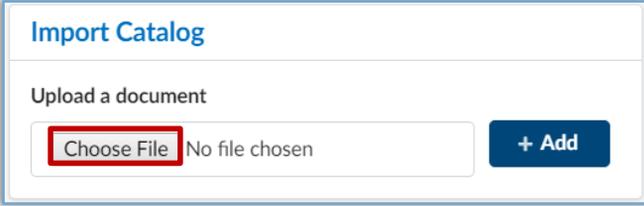


Step-by-Step Instructions for Modifying the Catalog Import Template

5

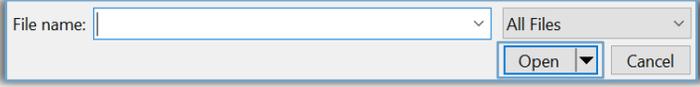
Find the downloaded Excel file on your computer, open the catalog sheet, make the necessary revisions using the Catalog Template that was downloaded from the DAS website as a reference. Save the Excel file with an updated file name, and close.

- a) On the Catalog Sheet page, click the **Choose File** button to upload the Excel file with the catalog items. Refer to page 15 for instructions on editing the template for a hosted catalog.



The screenshot shows a dialog box titled "Import Catalog" with the sub-header "Upload a document". Below this, there is a text input field containing "No file chosen" and a blue button labeled "+ Add". The "Choose File" button is highlighted with a red rectangular box.

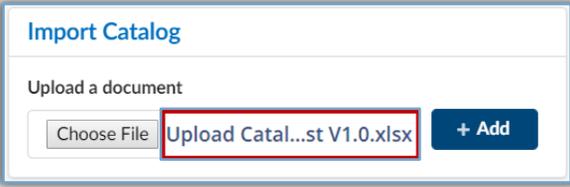
- b) Find the updated Excel file on your computer, select the file, and click the **Open** button.



The screenshot shows a file selection dialog box. It has a "File name:" field, a file type dropdown menu set to "All Files", and "Open" and "Cancel" buttons. The "Open" button is highlighted with a blue rectangular box.

6

- c) Check to ensure the name of the updated Excel file appears next to the Choose File button.



The screenshot shows the "Import Catalog" dialog box. The "Choose File" button is now disabled, and the text "Upload Catal...st V1.0.xlsx" is displayed next to it. This text is highlighted with a red rectangular box. The "+ Add" button remains visible.

Step-by-Step Instructions for Uploading a Hosted Catalog

d) Click the **+ Add** button.



6

e) Towards the top of the Catalog page, click **Submit** to submit the Excel file. If successful, a confirmation message will appear. If the import is rejected, an error message will appear with the details of the error. You will receive email notifications regarding updates as the data import is reviewed and approved.



You have now completed the steps for initiating a data import. After a hosted catalog import has been initiated by either a State User or Supplier, the import needs to be reviewed and enabled. For next steps refer to “[Enabling a Hosted Catalog](#)”.

▲ For more information regarding the steps Suppliers take to update a hosted catalog, refer to the Ohio|Buys Supplier learner guide on the DAS website: (<https://das.ohio.gov/ohiobuys> > Training > Supplier)

ENABLING A HOSTED CATALOG

Overview

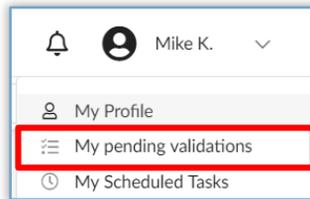
- What's Covered: Completing the Format Control (Enablement) steps during a data import for a hosted catalog
- Roles: Catalog Analyst
- Used When: A hosted catalog is uploaded by a State user or Supplier and the accuracy of the data needs to be verified

Step-by-Step Instructions for Completing Catalog Enablement

Completing the Format Controls steps or enabling a hosted catalog requires a catalog to have been previously uploaded into Ohio|Buys by a State User or Supplier. This data within the upload needs to be reviewed for accuracy and approved or rejected. Reviewing this data does not make it available to the public until it is published.

1

Log in to Ohio|Buys. From the Main Menu Navigation Bar, navigate to your User Name Options, and select **My Pending Validations** from the drop-down menu.



2

a) On the My Open Workflow Tasks page, scroll until you find the name of the updated catalog sheet you need to review.

▲ The catalog sheet you need to review will have an **Action** of *Catalog Enablement*.

Process	Requestor	#	Object	Action	Performer	Forwarded on	Action's date (UTC-4)	Status	Delegated to	Initial performer	History
Catalog Upload Approval	COSBY Naeem	380	SNAP-ON INDUSTRIAL	Catalog Enablement	ANALYST KAIZER Catalog	6/24/2019		To be validated		ANALYST KAIZER Catalog	

b) Once you find the correct catalog sheet, click the **Pencil** () icon located to the left of the catalog sheet.

Process	Requestor	#	Object	Action	Performer	Forwarded on	Action's date (UTC-4)	Status	Delegated to	Initial performer	History
 Catalog Upload Approval	COSBY Naeem	380	SNAP-ON INDUSTRIAL	Catalog Enablement	ANALYST KAIZER Catalog	6/24/2019		To be validated		ANALYST KAIZER Catalog	

Step-by-Step Instructions for Completing Catalog Enablement

Now, navigate to the **Format Control** tab on the left-hand side. Within the Format Control tab, ensure there are no lines with blocking or non-blocking anomalies. For more information on the fields on this page, refer to the [Catalog Import Field Guide](#) at the end of this document.

Import Statistics

0 have been submitted and are available for analysis
0 lines have been published in the system

Lines Imported	Correct Lines not Submitted
7	6
Lines Submitted	Blocking Lines with anomalies
0	0
Lines Published	Non-Blocking Lines with anomalies
0	1

Detailed Statistics

Imported tables inserts/edits

Anomalies Detected

Select All

Error copying ITEM_CTR_REF to ctr_id 1

1 Result(s) ⚙️

▲ If anomalies exist, these are highlighted in the Import Report box within the Format Control tab. Below the Import Report box, you can find details for each anomaly. In general, if there are anomalies, you should send the catalog back to the Supplier to correct them. However, for minor discrepancies (e.g., mistyped contract number) you may correct them yourself. To fix the anomalies:

a) Click the **Pencil** (✎) icon next to an anomaly to resolve.

Line	Extraction date (UTC-4)	Status	Alert
2	6/24/2019 7:10:11 PM	Not Imported	• Error copying ITEM_CTR_REF to ctr_id

b) Within the Correct Anomalies pop-up window, on the left is data from the newly uploaded catalog sheet and on the right is data in Ohio|Buys. Scroll until you find an anomaly highlighted in orange (e.g., error copying contract number). Ohio|Buys will automatically suggest a replacement for the anomaly. Click on the **Checkbox** (☐) icon to automatically override the anomaly.

ITEM_CTR_REF :	800560	Contracts :	<input type="checkbox"/>	HARDWARE: Plumbing, Electrical and Related Items
----------------	--------	-------------	--------------------------	--

c) If the suggested fix for the anomaly is not suitable, you are also able to use the search functionality to find the correct information by clicking the **drop-down** (▾) icon and typing to search. When you have found the correct information, click on the **Checkbox** (☐) icon and click **Save and Close**.

Correct anomalies

ITEM_SUP_CODE :	0000136740	Suppliers :	<input type="checkbox"/>	SNAP-ON INDUSTRIAL
ITEM_SUP_EMAIL :		Users ## :	<input type="checkbox"/>	
ITEM_SUP_REF :		Manufacturer reference :	<input type="checkbox"/>	
ITEM_SUP_URL :		Catalog link :	<input type="checkbox"/>	
ITEM_CTR_REF :	800560	Contracts :	<input type="checkbox"/>	HARDWARE: Plumbing, Electrical and Related Items

Step-by-Step Instructions for Completing Catalog Enablement

4

If the information is accurate and complete, click the **Approve Format** button towards the top of the Catalog Sheet page.

▲ If you reject the catalog sheet, you are prompted to enter comments which are sent to the user who uploaded the catalog sheet (e.g., Supplier, Contract Analyst, Catalog Analyst).



5

Click the **Save** button towards the top of the Catalog Sheet page. The hosted catalog upload is now sent to the appropriate Contract Analyst for review.



You have now completed the steps for reviewing and updating data within a hosted catalog data import. After the data in the import has been reviewed and approved, it needs to be published in order for all State Users to see it when shopping. For next steps, refer to "[Publishing a Hosted Catalog](#)".

PUBLISHING A HOSTED CATALOG

Overview

- What's Covered: Publishing the data within a hosted catalog import so that it is visible while shopping
- Roles: Contract Analyst
- Used When: A hosted catalog is imported by a State user or Supplier then the data is enabled or verified by the Catalog Analyst

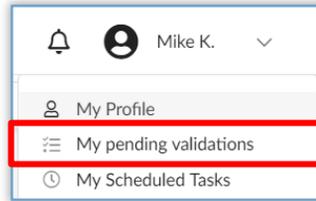
Step-by-Step Instructions for Publishing a Hosted Catalog



Publishing a hosted catalog requires a catalog sheet to have been previously uploaded into Ohio|Buys by the Catalog Analyst or a Supplier and the Format Controls or enablement steps to have been completed. Publishing makes the changes visible to all of the State users while they shop within Ohio|Buys.

1

Log in to Ohio|Buys. From the Main Menu Navigation Bar, navigate to your User Name Options, and select **My Pending Validations** from the drop-down menu.



2

a) On the **My Pending Validations** page, scroll until you find the name of the updated catalog sheet you need to approve or reject. You can narrow your search by selecting “Catalog Upload Approval” from the **Process** drop-down field at the top of the screen.

▲ The catalog sheet you need to review will have an Action of Contract Analyst.

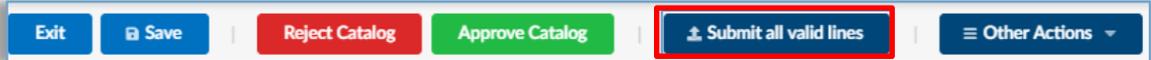
Process	Action	Object	History
Catalog Upload Approval	Contract Analyst	SNAP-ON INDUSTRIAL	
Supplier Activation	Creation	Columbus Coffee # 2 (UNITED STATES)	
Supplier Activation	Creation	Columbus Coffee #1 (UNITED STATES)	
Supplier Activation	Enrollment Completed	test1 (UNITED STATES)	

b) Once you find the correct catalog sheet, click the **Pencil** () icon located to the left of the catalog sheet.

Process	Requestor	#	Object	Action	Performer	Forwarded on	Action's date (UTC-4)	Status	Delegated to	Initial performer	History
Catalog Upload Approval	COSBY Naem	380	SNAP-ON INDUSTRIAL	Catalog Enablement	ANALYST KAIZER Catalog	6/24/2019		●●○		ANALYST KAIZER Catalog	

Step-by-Step Instructions for Publishing a Hosted Catalog

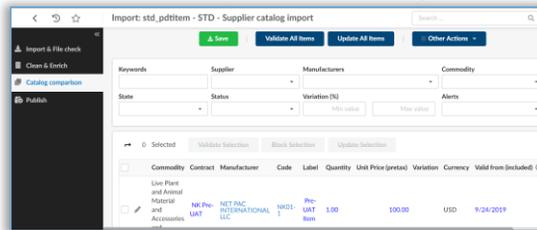
- a) To publish all lines within the Excel file, click on the **Submit all Lines** button towards the top of the Catalog Sheet page. On the Catalog Sheet page, navigate to the Format Control tab on the left side. There may be a need to only publish the lines without anomalies until the lines with errors can be resolved.



3

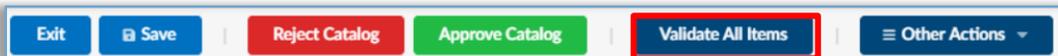
- ▲ If you only want to submit the lines that appear in the search results at the bottom of the page, click the **Submit Results** button.
 - ▲ If you only want to submit the lines you manually selected at the bottom of the page, click the **Submit Selection** button.
 - ▲ If you want to review anomalies highlighted in the Import Report box within the Format Control Tab, click on the **Pencil** (✎) icon next to an anomaly and resolve it as applicable.
- b) Once you click the **Submit all Lines** button, there will be a pop-up requiring you to confirm your choice to submit all rows. Click the **Ok** button.

- a) Navigate to the **Catalog Comparison** tab on the left side. This tab highlights any differences between the existing hosted catalog items and the proposed changes. Click on the **Validate all Items** button towards the top of the Catalog Sheet page.

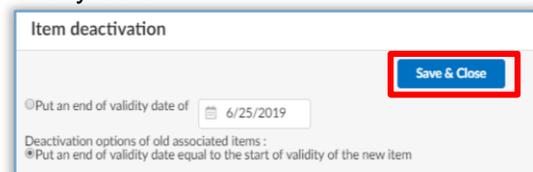


- ▲ You should only click the **Validate all Items** button if you have reviewed the differing report and verified that the content is correct or in accordance with the contract

4



- b) Once you click the **Validate all Items** button, a pop-up titled **Item Deactivation** appears. If you are updating existing items with this import, then the old versions will be deactivated upon the date listed in this field. If you are creating new items, then click the **Save & Close** button.
- ▲ Since new items are being added, you must select when the old items will no longer be valid and visible in the catalog. You can either set the end validity date to the start date of validity for the new item or manually specify an end validity date.



Step-by-Step Instructions for Publishing a Hosted Catalog

- 4
- c) Scroll to the top of the Catalog Sheet page and click the **Approve Catalog** button to publish the catalog. The proposed changes will be visible in the catalog based on the validity start date.
- ▲ If you reject the catalog, you are prompted to enter comments that would be emailed to the user who uploaded the catalog.



You have now completed the guide for this section. The items associated with this catalog are now available to all shoppers within Ohio|Buys.

Throughout the duration of the contract, there may be a need to create or update items on a one-off basis. This can be done using the item creation and editing features. For instructions on how to create an item, refer to “[Creating a Hosted Catalog Item](#)”. For instructions on how to update an item, refer to “[Updating a Hosted Catalog Item](#)”.

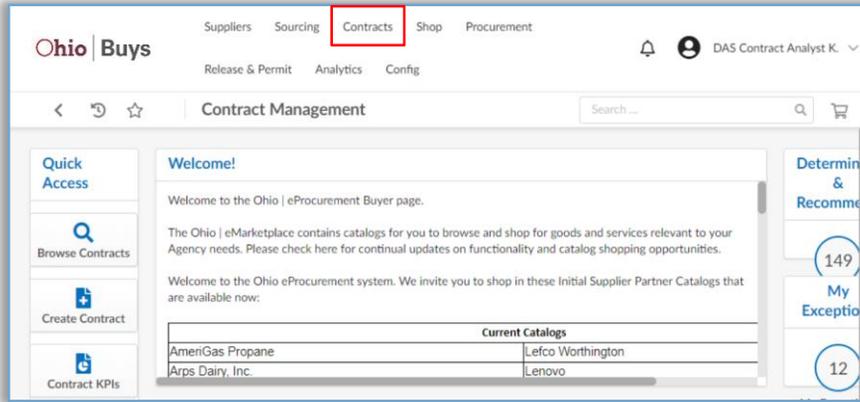
CREATING A HOSTED CATALOG ITEM

Overview

- What's Covered: How to create a single hosted catalog item directly from the contract in the Price List
- Roles: Catalog Analysts, Contract Analysts
- Used When: A small number of items need to be created for an existing contract

Step-by-Step Instructions for Creating a Hosted Catalog Item

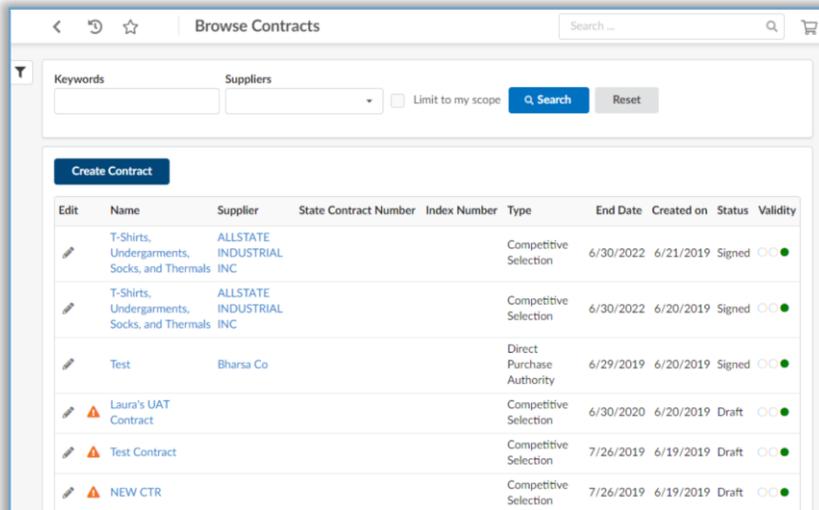
Log in to Ohio|Buys. From the Main Menu Navigation Bar, navigate to the **Contracts** tab and click on **Contracts**. From the drop-down menu, select **Browse Contracts**.



1

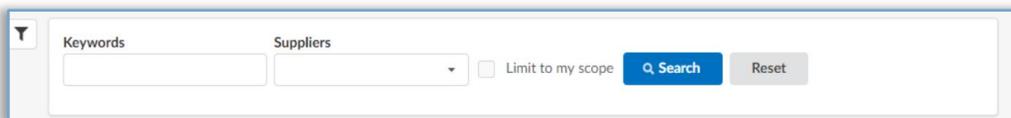
From the **Browse Contracts** results page, you have two primary search and filter methods:

a) You can manually scroll through the contracts automatically displayed



2

b) You can manually enter your desired search terms in the **Keywords** field or further refine your search results through the available filters (e.g., Suppliers, Contracting Entity)



Locate the contract you want to update and select the **Pencil** () icon next to the item.

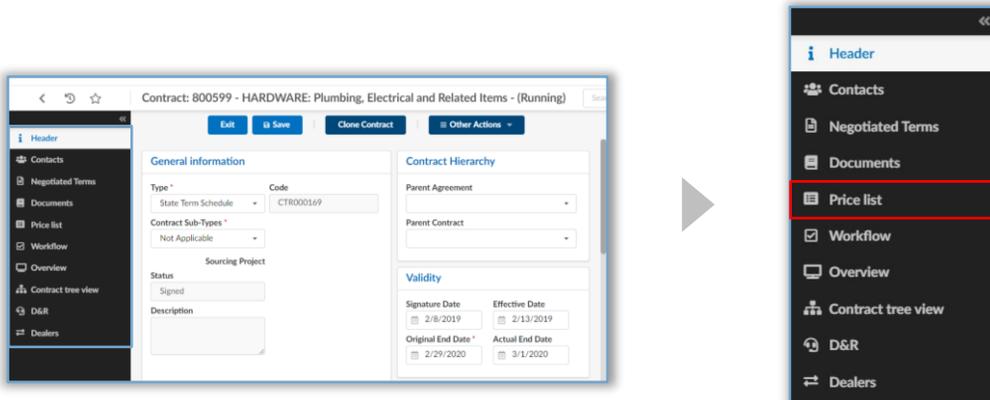
3

Edit	Name	Supplier	State Contract Number	Index Number	Type	End Date	Created on	Status	Validity
	HARDWARE: Plumbing, Electrical and Related Items	SNAP-ON INDUSTRIAL	800599	ST5511	State Term Schedule	3/1/2020	6/11/2019	Signed	

Step-by-Step Instructions for Creating a Hosted Catalog Item

Navigate to the **Price List** tab.

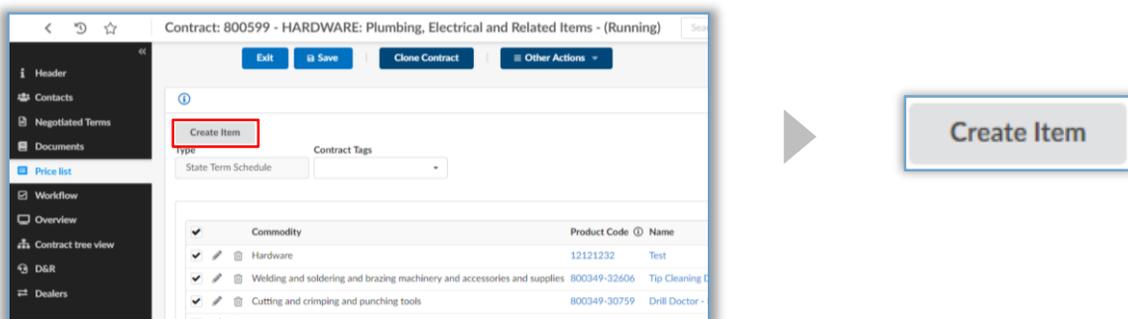
4



a) On the Price List tab, a complete list of items associated with the specific contract you chose are visible. Towards the top, click the **Create Item** button to create a new Catalog Item tied to the contract you chose:

- A Catalog Item is comprised of a Product Information and an Item Description:
 - **Product Information:** Contains the manufacturing information that applies regardless of which Supplier the item is purchased from (e.g., Dell Latitude Laptop) and it does not contain an indication of the price or the possible Supplier(s).
 - **Item Description:** Contains more specific information about an item, including the details around the Dealers that have the item within their catalog for purchase. An item is always attached to a product.

5



Step-by-Step Instructions for Creating a Hosted Catalog Item

- b) Within the Create Item pop-up, input the items' information into the mandatory fields. Complete the optional fields as desired. For more information on how to complete each field refer to the [Catalog Update Field Guide](#)

Ohio Buys Suppliers Sourcing Contracts Shop Procurement Approvals Invoicing Release & Permit Analytics Admin Config Integration Settings

Contract: FX042020 - Bradley Sample CTR - (Running)

Item: SPMS-6 - OAKS Warrants Envelopes

Save Save & Close Create Price Sheet

Product Information

Product Label * OAKS Warrants Envelopes Product Code * SPMS-6

Product Reference * Type * Product

Commodity * 44121505 - Speciality envelopes Characteristics Group

Manufacturer * SPMS Link to Catalog Copy.Center@das.ohio.gov

Generic Product

Detailed Description

Description * OAKS Warrants size envelopes (includes printing and warrant stock) ***Please contact State Printing to develop specifications for your needs and obtain a price prior to placing your order at Copy.Center@das.ohio.gov.

Click or Drag to add files

Keywords

Summary

OAKS Warrants Envelopes

File Upload

Click or Drag to add a picture

Ohio Department of Administrative Services

Ohio Buys Suppliers Sourcing Contracts Shop Procurement Approvals Invoicing Release & Permit Analytics Admin Config Integration Settings

Contract: FX042020 - Bradley Sample CTR - (Running)

Item: SPMS-6 - OAKS Warrants Envelopes

Save Save & Close Create Price Sheet

Item description

Name * OAKS Warrants Envelopes Item Code *

Supplier * CINCINNATI ASSOCIATION FOR THE BLIND

Punchout

Incoterm Incoterm Location

Shipping Mode Packaging

Effective Date 4/20/2020 To (include) 4/30/2021

Contract * Bradley Sample CTR

Pricing

Status * Approved

Validity Start Date 4/20/2020 Validity End Date

Retail price (Total) *

Currency USD

Negotiated Quantity UOM (Each)

Quantity	Price (Excl. Tax)	Price (Incl. Tax)
<input type="text"/>	<input type="text"/>	<input type="text"/>

Example

Minimum Order Quantity

Ohio Buys Suppliers Sourcing Contracts Shop Procurement Approvals Invoicing Release & Permit Analytics Admin Config Integration Settings

Contract: FX042020 - Bradley Sample CTR - (Running)

Item: SPMS-6 - OAKS Warrants Envelopes

Save Save & Close Create Price Sheet

CINCINNATI ASSOCIATION FOR THE BLIND

Punchout

Incoterm Incoterm Location

Shipping Mode Packaging

Effective Date 4/20/2020 To (include) 4/30/2021

Contract * Bradley Sample CTR

Comments

Optional Items

Is an option

Select Options

[Page] [407 missing text] [Update text] [Admin settings] [Page settings] [D] [68kg] [R] [0.69x+0.30x] [Redr.: 0.08x] [-1.00MB] [E] [C]

Step-by-Step Instructions for Creating a Hosted Catalog Item

6

Once you input the mandatory information and included the optional information as necessary, scroll towards the top of the page, and click the **Save & Close** button.



You have now completed the guide for this section. If the data for an existing item needs to be updated on a one-off basis, refer to “[Updating a Hosted Catalog Item](#)”.

UPDATING A HOSTED CATALOG ITEM

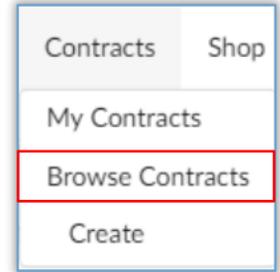
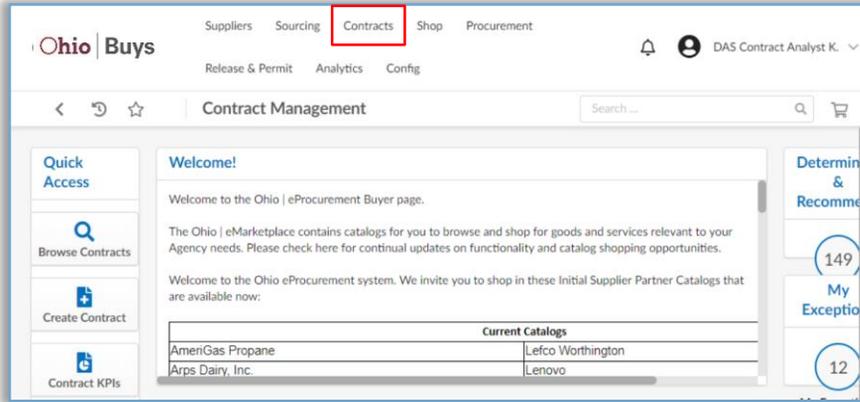
Overview

- What's Covered: Updating a single hosted catalog item directly from the contract in the Price List
- Roles: Catalog Analyst, Contract Analyst
- Used When: A small number of edits need to be made to the hosted catalog (not including price)

Step-by-Step Instructions for Updating a Hosted Catalog Item

Log in to Ohio|Buys. From the Main Menu Navigation Bar, navigate to the Contracts tab and click on **Contracts**. From the drop-down menu, select **Browse Contracts**.

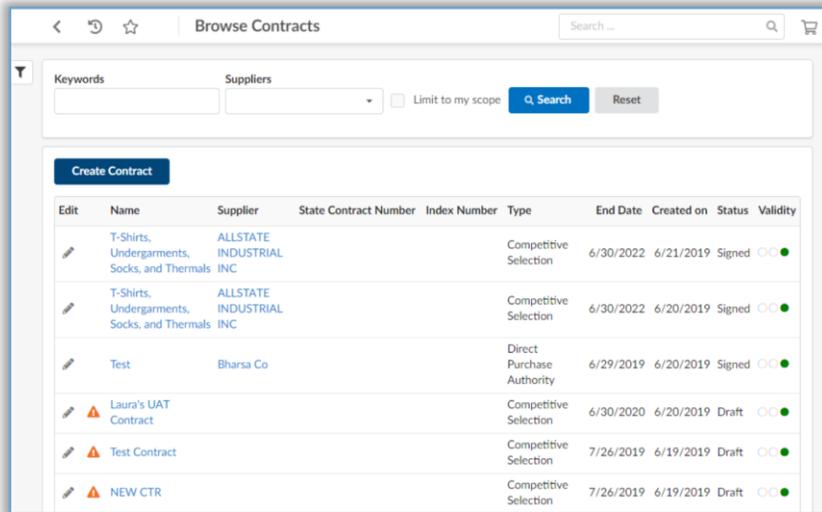
1



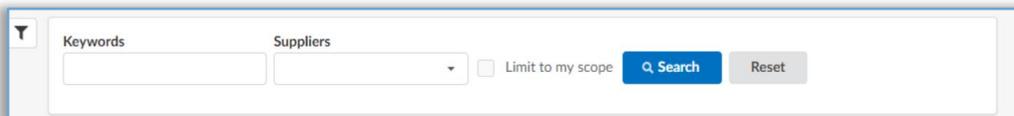
From the Browse Contracts results page, you have two primary search and filter methods:

a) You can manually scroll through the contracts automatically displayed; or

2

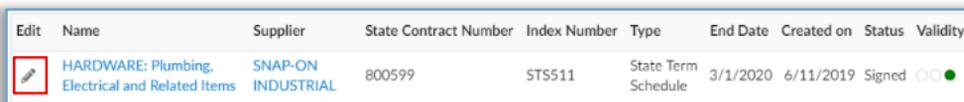


b) You can manually enter your desired search terms in the Keywords field or further refine your search results through the available filters (e.g., Suppliers, Contracting Entity)



3

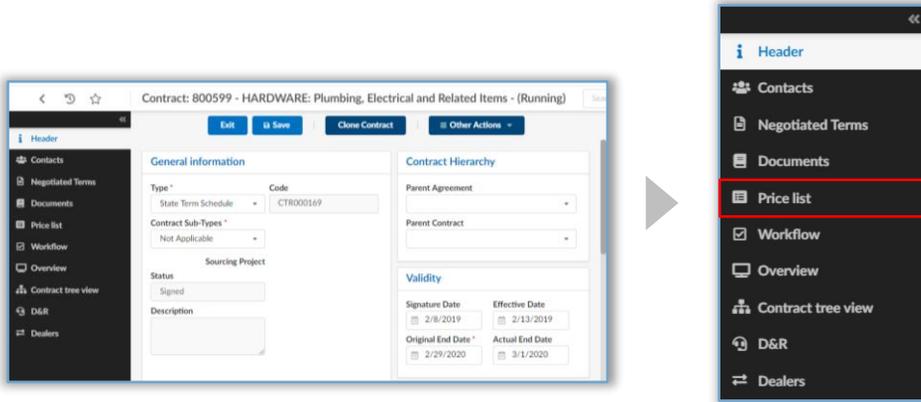
Locate the contract you want to update and select the **Pencil** () icon next to the item.



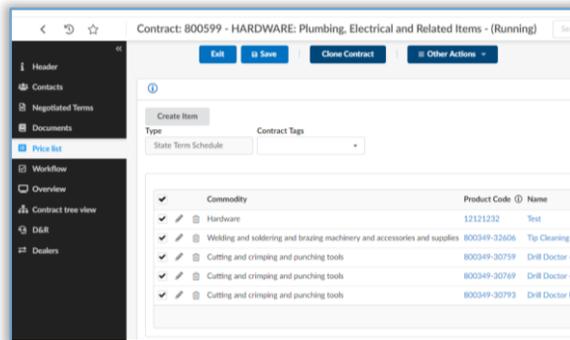
Step-by-Step Instructions for Updating a Hosted Catalog Item

Navigate to the Price List tab and click **Price List**.

4

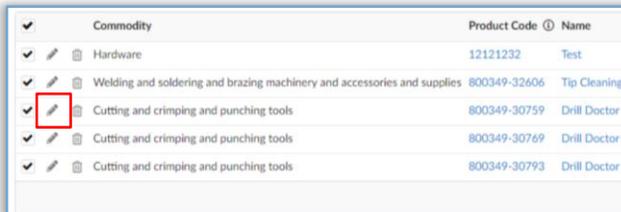


a) On the Price List tab, a complete list of items associated with the specific contract you chose are visible.

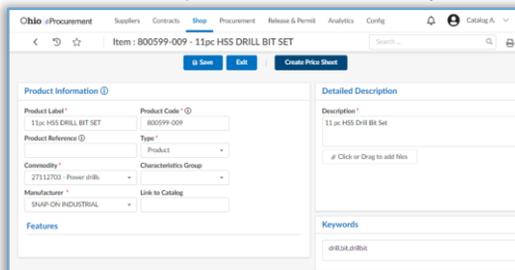


b) Locate the item you want to update and select the **Pencil** (✎) icon next to the item.

5



c) The catalog item's product and item information is displayed. Since you are updating an existing item, the mandatory fields, which are based on the item's original creation, will automatically populate and can be adjusted as necessary.



Step-by-Step Instructions for Updating a Hosted Catalog Item

Update the product as necessary. Product Information includes fields such as section includes mandatory fields such as Code, Reference, Label, Type, Manufacturer, Commodity and optional fields like Characteristics Group. This section does not contain Supplier or Dealer information such as price. For more information on updating these fields, refer to the [Catalog Update Field Guide](#) at the end of this Learner Guide.

- a) **Characteristics Group Field:** This field is not mandatory but allows for the grouping of features. Features are the associated specifications related to a specific product or commodity. For example, a computer can have features like Screen Size, Weight, Storage, Processor. This field provides additional information to help the user select the desired item. Features will originate from a Characteristic Group that is either attached to the commodity or is manually assigned to the product. Please review the existing Characteristic Groups before you add a new one.

▲ If you want to add a new Characteristics Group, complete the following steps:

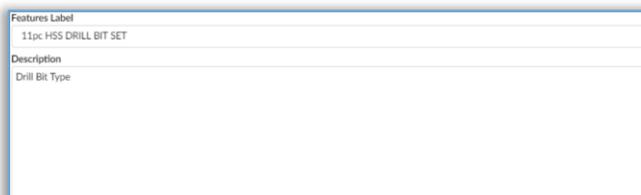
- 1) In the Characteristics Group, click the **Drop-down** (-) icon.

A screenshot of a web form field labeled "Characteristics Group". The field is empty and has a small downward-pointing arrow icon on the right side, indicating it is a drop-down menu.

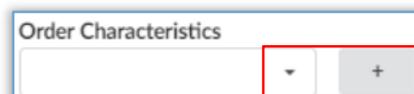
- 2) In the Configure Catalog Features pop-up, you can scroll through or use the search functionalities to apply an existing Characteristics Groups to a product. Alternatively, you can create a new Characteristics Groups by selecting **See All** and clicking on **Create a New Feature Group**.

A blue rectangular button with white text that reads "Create a New Feature Group".

- 3) Complete the **Features Label** field for your Characteristics Group. For example, since this Characteristics Group is specific to the product we are editing, you will enter the product's label in this field. Complete the **Description** field. This information should reflect the various Purchase Orders Features added to the Characteristics Groups. For example, you can add Shirt Size to the Purchase Order Feature. Click **Save**.

A screenshot of a form with two input fields. The first field is labeled "Features Label" and contains the text ".11pc HSS DRILL BIT SET". The second field is labeled "Description" and contains the text "Drill Bit Type".

- 4) In the Order Characteristics field, click on the **Drop-down** (-) icon to search for and select an existing Purchase Orders Features or click the **Plus Icon** (+) to add a new Purchase Orders Features. You should always search to make sure the Purchase Order Feature does not exist so as not to create duplicates. To create a new Purchase Order Feature, click the **Plus Icon** (+).

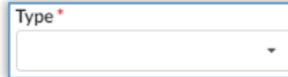
A screenshot of a web form field labeled "Order Characteristics". The field is empty and has a small downward-pointing arrow icon and a plus sign icon on the right side, indicating it is a drop-down menu with an add option.

Step-by-Step Instructions for Updating a Hosted Catalog Item

- 5) In the Order Features pop-up, complete the Label field, which describes the feature being added (e.g., Shirt Size).



- 6) Complete the **Type** field, which controls how the various values for the features will be displayed (e.g., Checkbox, drop-down list, free text, radio button).



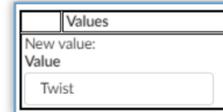
- 7) If the Order Feature is mandatory then click the **Checkbox Icon** (). If an Order Feature is mandatory, input a number to order the item.



- 8) Click **Save**.

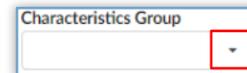


- 9) In the Values box, enter the first value for the Order Features and click **Save**. Continue to add values as necessary and click **Save & Close**.



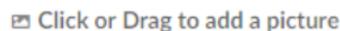
- 10) If you want to add another Purchase Orders Feature, then repeat Steps 4-9 as necessary. If you are complete, click **Save & Close**.

- 11) To apply the Characteristics Group you created within the Characteristics Group field, click the **Drop-down** (▼) icon.



- 12) You can either scroll through the automatically populated Characteristics Groups or use the search functionalities. Once you find the Characteristics Group you want to add, click the **Icon** () next to it.

- c) **Detailed Description Box**: This field is a mandatory field that provides a detailed description of the actual item.
- d) **Keywords Box**: This is an optional field that provides key words that describe the item (e.g. Computer, Monitors)
- Key words must be separated by commas and there should not be a space before or after each comma. The limit on the field length is 192 characters. Separating key words with a new line will not have any effect.
- e) **File Upload**: This is an optional but highly suggested field in which you upload an actual picture of the item by clicking the **Picture** (🖼️) icon or dragging a picture file to upload a new picture.



- Pictures should be in .jpg/.png format with a minimum resolution of 150 dpi.
- Pictures should be named with the item number they correspond to.

Step-by-Step Instructions for Updating a Hosted Catalog Item

e) Rates Box: Includes key information for each item

The screenshot shows a form with three main sections:

- Section 1 (Item tag):** A dropdown menu for selecting an item tag.
- Section 2 (Item description):** Fields for:
 - Item Reference (with a help icon)
 - Name (with an asterisk): 11 pc HSS DRILL BIT SET
 - Supplier (with an asterisk): SNAP-ON INDUSTRIAL
 - Supplier Contact: COSBY Naeem
 - Punchout
 - Packaging
 - Incoterm
 - Incoterm Location
- Section 3 (Pricing):** Fields for:
 - Validity Start Date: 2/13/2019
 - Validity End Date: 3/1/2020
 - Status (with an asterisk): Approved
 - Retail price (tax excl.): 55,910
 - Tax
 - Retail Price (Excl. Tax): 55,910
 - Currency (with an asterisk): USD
 - Minimum Order Quantity

1) Item Tag Box: Optional field used to flag or categorize an item. These tags may align with contract tags, but ultimately are applied at the discretion of the Catalog Analyst.

- ▲ Provides the ability to flag items based on State purchasing requirements, provides a quick visual aid for end users when searching for items, and can be used as a search criteria.
- ▲ Items that have a tag will appear at the top of search results. There are three Mandatory Source Tags: Mandatory Level 1 Requisite (M1), Mandatory Level 2 Requisite (M2), and Mandatory DAS Contract (M3). In addition, items can also be tagged to indicate Hazardous Materials or MBE Set Aside.

2) Item Description Box: Contains specific mandatory and optional information fields for an item

- ▲ The Item Code, Label, Supplier, and Contact fields are mandatory
- ▲ The item must be tied to a product.

3) Pricing Box: Contains mandatory and optional information fields for an item

- ▲ The Validity Start Date, Validity End Date, Retail Price fields are mandatory. The dates should align with the start and end dates for the contract and the price should match what is in the signed contract.
- ▲ The option for tiered pricing exists and allows for an item to have either a fixed or incremental price. With a fixed price, items over a certain quantity are priced the same. With an incremental price, for example, the first 10 items will have a certain price, the next 10 will items with have a certain price, and so on.

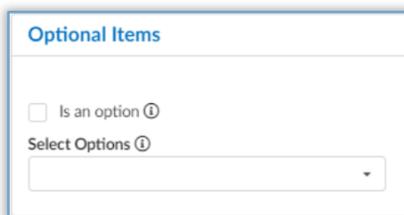
Step-by-Step Instructions for Updating a Hosted Catalog Item

e) Rates Box: Includes key information for each item

4) Optional Items Box

▲ This is not an option for an item that was previously created. This provides the Requisitioner the ability to easily add related items when purchasing a particular item. When optional items are associated with an item, they need to be selected from a requisition that already includes the main menu item, meaning that they cannot be purchased on their own.

▲ If you want to make an item an Optional Item, it can no longer be ordered as a standalone item. Click the **Checkbox** () icon next to the 'Is an Option' field to make an item an Optional Item. If you want to add an Option, in the Options field, click the **Drop-down** (▾) icon. In the pop-up, all available options are displayed. Scroll to your desired item and click the corresponding Checkbox Icon ().



Once you have determined which item information needed to be updated, scroll towards the top of the page, and click **Save & Close**.



You have now completed the steps for updating a hosted catalog item. This is the last activity in the Contract Lifecycle. For more information related to a specific step in the process, refer to the [Table of Contents](#).

If a punchout catalog needs to be set up, refer to the next section.

CREATING A PUNCHOUT CATALOG

Overview

- What's Covered: A checklist to be used when creating a new punchout catalog for a Supplier
- Roles: Catalog Analyst
- Used When: A punchout catalog will be created for a new contract instead of a hosted catalog

Details on Setting Up a Punchout Catalog

A punchout catalog is a catalog available on an electronic commerce website that is maintained by the Supplier. In this case, these catalogs rely upon a series of cXML documents exchanged simultaneously between Ohio eProcurement and the Supplier's punchout-enabled system.

Shoppers utilize a punchout catalog by leaving the Ohio|Buys and "punching out" to the Supplier's website, choose which items are needed, and then return or "punch back" into Ohio|Buys to complete the requisition and ordering process.

The Catalog Analyst can be contacted with questions regarding setting up or modifying a punchout catalog.

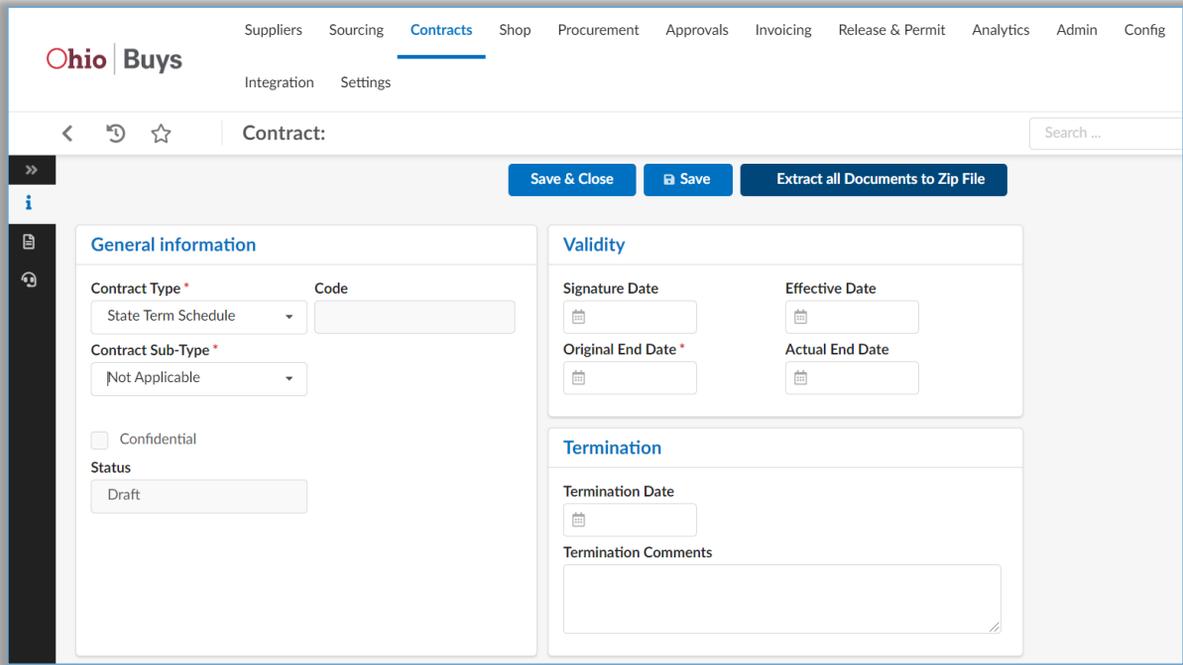
A hosted catalog (in Excel spreadsheet format) is uploaded by Suppliers into Ohio|Buys and maintained by the State and the Supplier. Shoppers access a hosted catalog in Ohio|Buys, add items to their cart, and complete the requisition and ordering process. Once you identify the type of catalog you will be using, please follow the instructions below for either Punchout or Hosted catalogs. **Please refer to ["Uploading a Hosted Catalog"](#) for more information on setting up a hosted catalog.**

APPENDIX

CONTRACT FIELD GUIDE

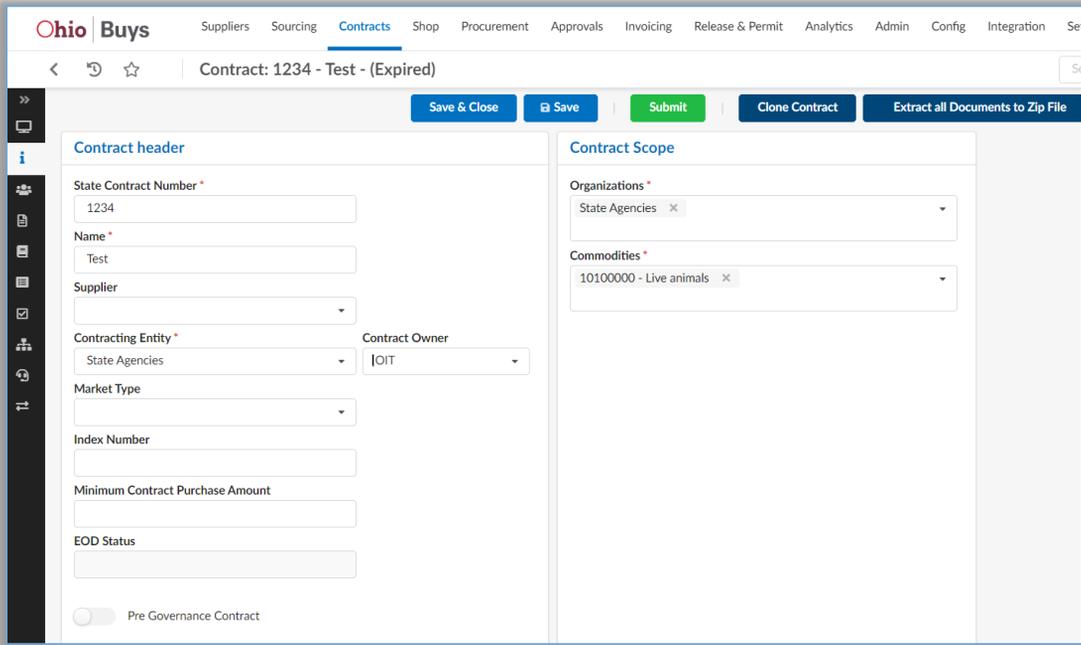


Contract Field Guide: Contract Header (1/3)



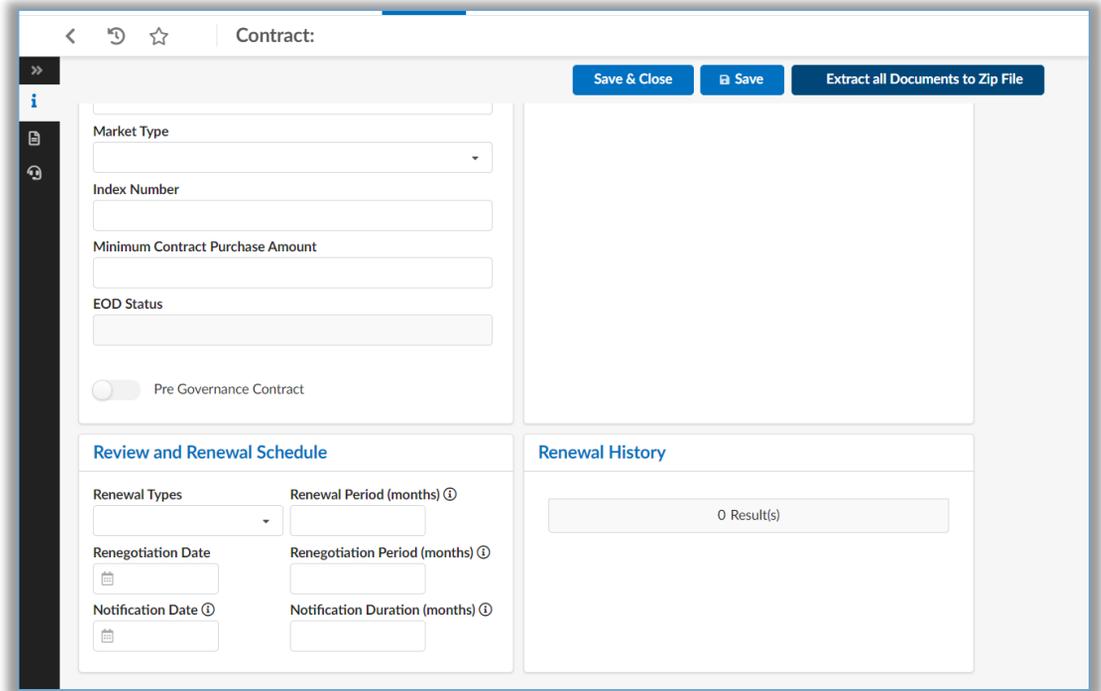
Object	Definition	Additional Info
Actual End Date	The date that the contract ends	May reflect termination date or modified end date due to renegotiation. Optional
Code	A unique system identifier for the contract	Automatically assigned by Ohio Buys
Confidential	Indicates if the contract is confidential	If checked, this contract will be hidden from all State users that are not listed as internal team members even if the user has profile & organizational scope that would normally allow access to this contract
Contract Sub-Type	Sub-category for contracts	Example: Single Agency Contract. Full list on Page 10
Contract Type	Main category for contracts	Example: Competitive Selection. Full list on Page 10
Effective Date	The start date for the contract	Can be after the signature date and must be dated prior to the Original End Date and Actual End Date
Original End Date	The end date for the contract at the time the shell is created	Must be dated after the Effective Date
Signature Date	The date the contract was signed	If multiple signatories have different dates, it is the latest date listed
Status	Indicates the status of the contract	Statuses include: Draft, Signed, Signature In Progress, Approval In Progress, Approved, Negotiation In Progress, Deleted, Cancelled by Amendment
Termination Comments	Additional detail on why contract was terminated early	
Termination Date	Termination date if contract terminated early	

Contract Field Guide: Contract Header (2/3)



Object	Definition	Additional Info
Commodities	The commodity codes for the items included in the contract	Codes follow UNSPSC code structure
Contracting Entity	The legal entity that signed the contract on behalf of the State of Ohio	
Contract Owner	The organizational entity that functions as the lead/point of contact for the contract	OIT contracts influence purchase requisition workflow for IT related purchases
EOD Status	Indicates that the Contractor or Supplier has an EOD designation	
Index Number	Internal Contract Number	State's internal contract number
Market Type	Provides additional information on the nature of the EOD designation	Example: Minority Business Enterprise "3" Contract
Minimum Contract Purchase Amount	Indicates that a single request must contain a minimum total value related to this contract in order to become a purchase order	The minimum total value could be the sum of different lines within the same request. Will trigger a blocking alert for all requests containing items from this contract
Name	The name or label for the contract	
Organizations	The organizations that are allowed to access and purchase items from this contract	These values will limit who can see items related to this contract while shopping
Pre Governance Contract		
State Contract Number	The contract number assigned by the State	This does not auto-populate and must be typed in
Supplier	This is the Contractor or organization that is entering into the agreement with the State	Supplier must already have a record in Ohio Buys in order to be selected

Contract Field Guide: Contract Header (3/3)



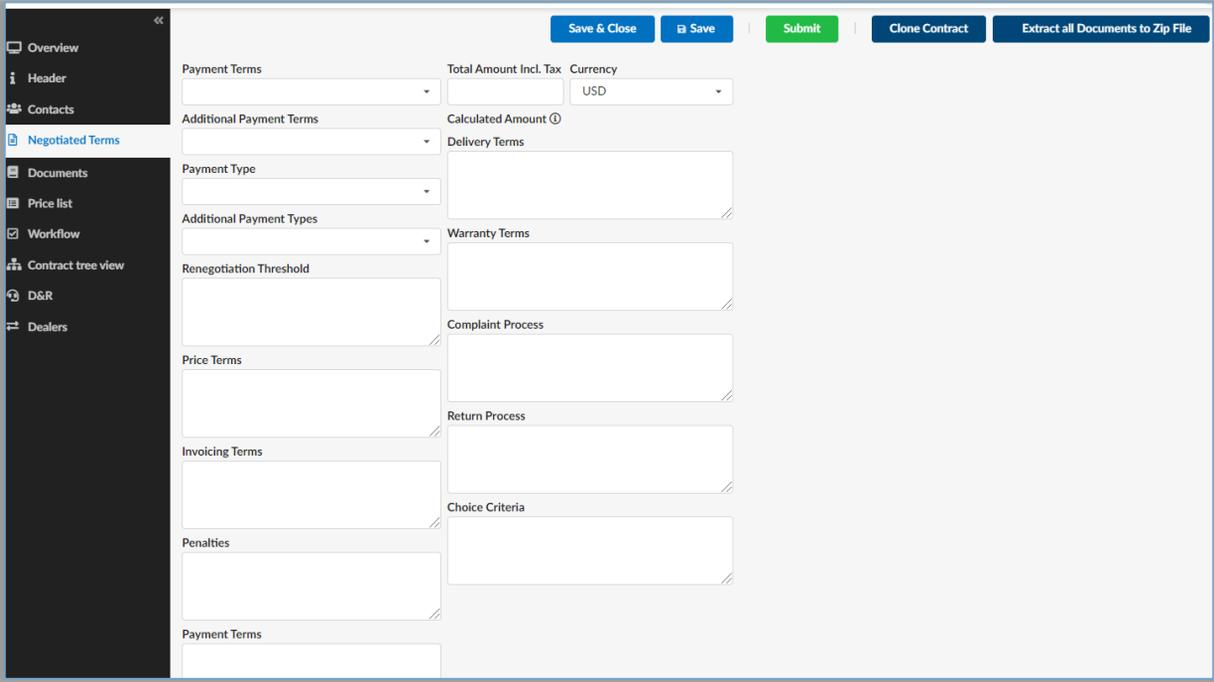
Object	Definition	Additional Info
Notification Date	This is the date that a notification goes out to the Contractor or Supplier indicating that the contract is about to expire	
Notification Duration (months)	Minimum number of months notice that is required prior to termination or end of contract	This will be outlined within the contract terms
Renegotiation Date	Date the contract terms were renegotiated	
Renegotiation Period (months)	Time period prior to the notice period set aside to renegotiate contract terms	
Renewal History	Outlines any actions taken on the contract (with dates and actors) where the agreement was renewed	
Renewal Period (months)	Number of months a contract is to be extended upon renewal	
Renewal Types	Indicates if a contract is eligible for renewal and, if so, whether that renewal can be automatic	

Contract Field Guide: Contract Contacts (1/1)

The screenshot shows a web application interface for managing contract contacts. At the top, the contract title is 'Contract: EX042020 - Bradley Sample CTR - (Running)'. Below the title are several action buttons: 'Save & Close', 'Save', 'Submit', 'Clone Contract', and 'Extract all Documents to Zip File'. On the left is a dark sidebar with navigation items: Overview, Header, Contacts, Negotiated Terms, Documents, Price list, Workflow, Contract tree view, D&R, and Dealers. The main content area is divided into two panels. The 'Supplier Contacts' panel has a section 'Add Supplier Contact(s)' with buttons for 'Select Existing Contact' and '+ Create New Supplier Contact'. The 'Internal team' panel has a 'Select Team' dropdown and a table with columns 'Email', 'Profile', and 'Contact'. The table contains one entry with email 'arianabradley@kpmg.com', profile 'Responsible (Contract)', and contact 'BRADLEY Ari'.

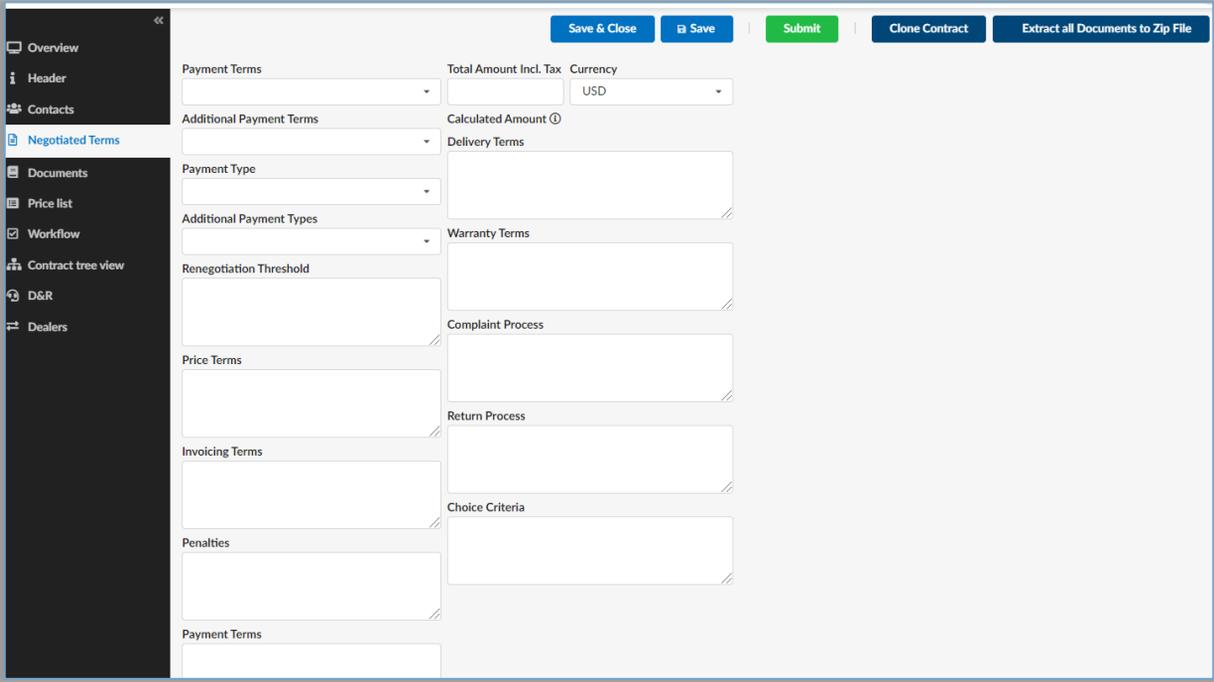
Object	Definition	Additional Info
Add Supplier Contacts	This section lists Supplier Contacts that are responsible for all activities related to this contract (e.g. renegotiation, renewal, notifications)	Contacts must be in entered into Ohio Buys by the Supplier and must be assigned a role of "Contract Contact"
Select Team	This section lists internal contacts or State users responsible for all activities related to this contract	Each user is assigned a role or this particular contract: Responsible, Contributor, SME or Subject Matter Expert. There must always be one user listed as Responsible. Contributors have editing rights and SMEs only have viewing rights for contract details.

Contract Field Guide: Negotiated Terms (1/2)



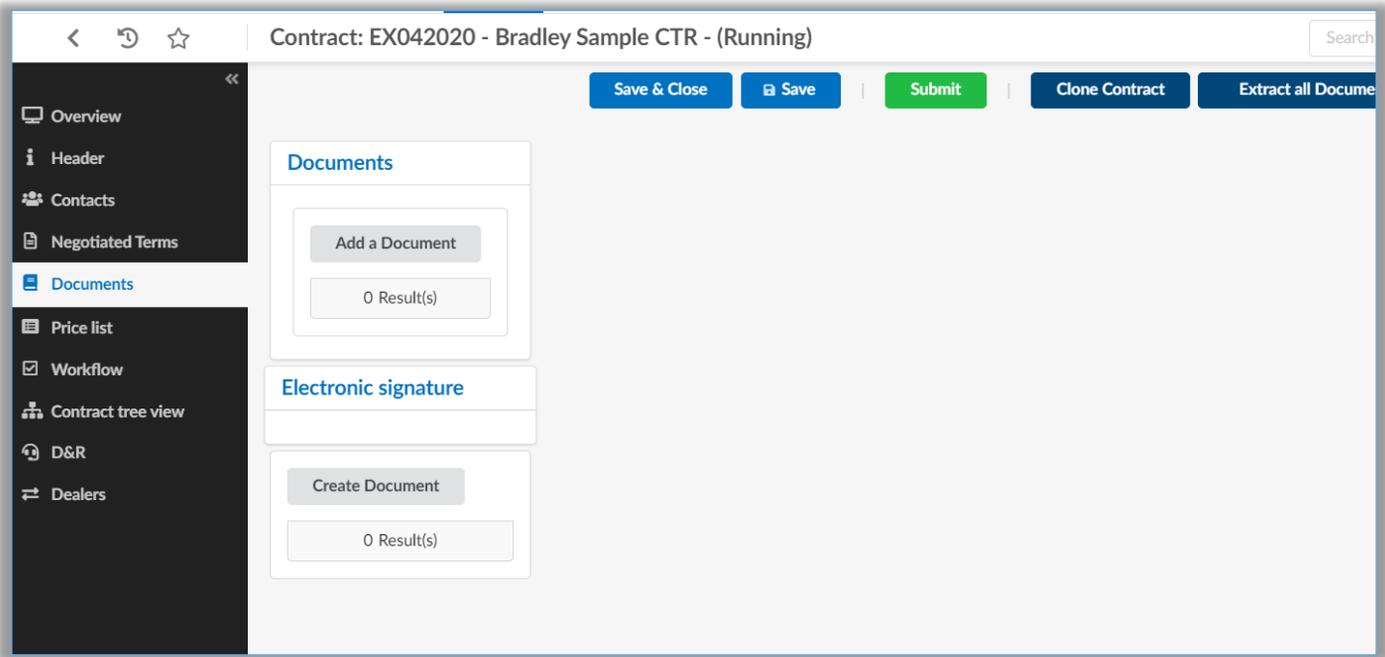
Object	Definition	Additional Info
Additional Payment Terms	Outlines additional details related to the payment terms within the contract	Would correspond to a section within the signed contract. Example: Standard payment terms are Net60 except when the total order value is under a minimum threshold in which case the terms would be Net30
Additional Payment Types	Outlines additional payment types if there are circumstances in which standard payment type would not apply	Would correspond to a section within the signed contract
Calculated Amount	Calculated total of contract based on contracted quantity x individual price point of items listed in Price List	Would correspond to a section within the signed contract
Choice Criteria	Any criteria outlined in the contract	Would correspond to a section within the signed contract
Complaint Process	Details how to process a complaint for the vendor's overall performance or a specific order from the vendor	Would correspond to a section within the signed contract
Currency	Lists the currency the contract was negotiated in	Would correspond to a section within the signed contract
Delivery Terms	Lists any terms related to the delivery of goods on purchase orders	Would correspond to a section within the signed contract
Invoicing Terms	Lists any terms related to the billing of goods or services on purchase orders	Would correspond to a section within the signed contract
Payment Terms (drop down)	Lists the terms in which payments for invoices are to be remitted	Would correspond to a section within the signed contract. Example: Net30, Net45, Net60

Contract Field Guide: Negotiated Terms (2/2)



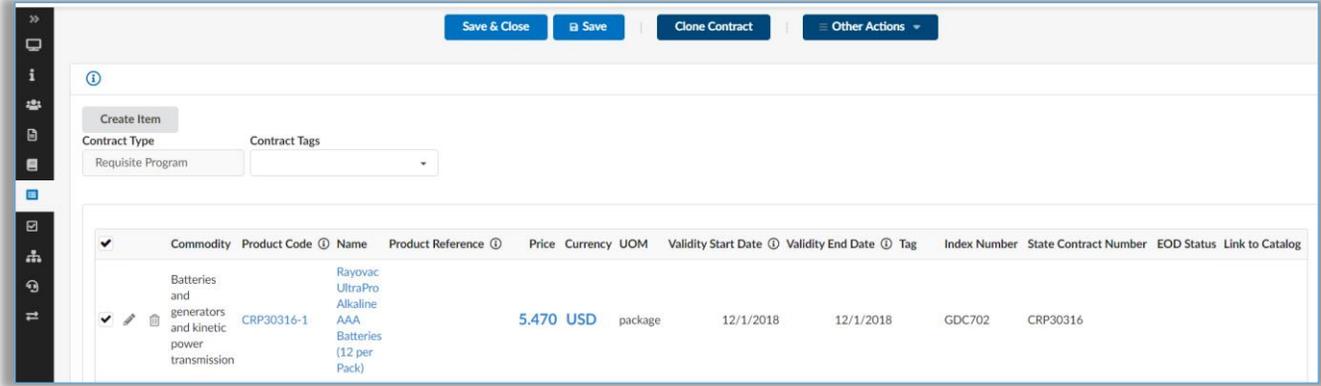
Object	Definition	Additional Info
Payment Type	Indicates the preferred method of remitting payment for this agreement	Would correspond to a section within the signed contract. Example: Cash, EFT, P-Card
Penalties	Outlines any penalties for violating the contract terms	Would correspond to a section within the signed contract
Price Terms	Outlines any stipulations to the agreed upon price(s) within the contract	Would correspond to a section within the signed contract
Renegotiation Threshold	Outlines a threshold that must be reached during the renewal process in order for all of the contract terms to be subject for review and renegotiation	Would correspond to a section within the signed contract
Return Process	Outlines the terms of returning delivered goods in order to receive a reimbursement for the purchase	Would correspond to a section within the signed contract
Total Amount Incl. Tax	Indicates the total dollar value of the contract less tax	Would correspond to a section within the signed contract
Warranty Terms	Any warranties for the products in the contract	Would correspond to a section within the signed contract

Contract Field Guide: Contract Documents (1/1)



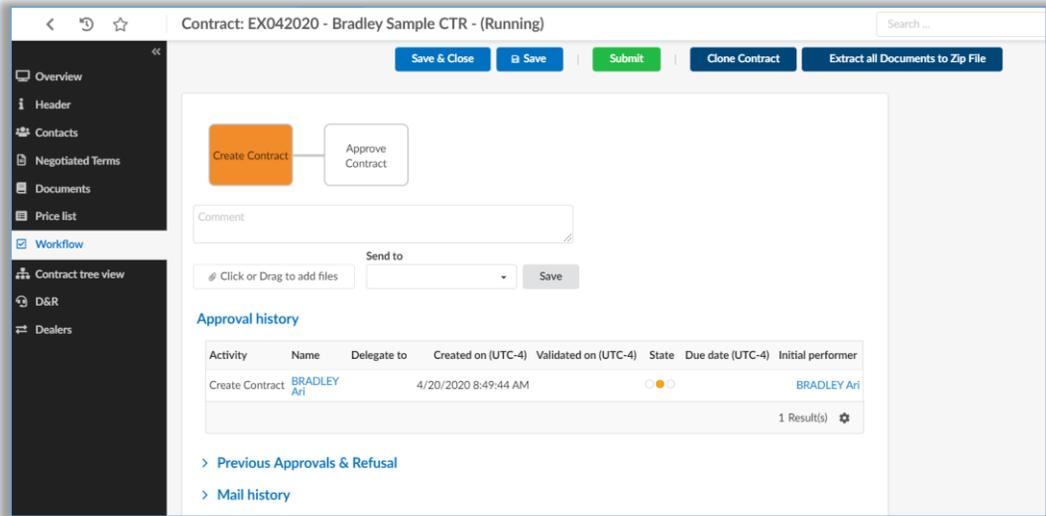
Object	Definition	Additional Info
Documents	This list contains any documents that were uploaded in relation to this agreement or documents that were authored directly in Ohio Buys	Example: A .pdf of the contract, a supplemental document to the contract
Electronic Signature	This list contains uploaded documents related to the contract. If e-Signature is enabled, this section will contain a copy of the document that was authored in Ohio Buys and then signed electronically	

Contract Field Guide: Contract Pricelist (1/1)



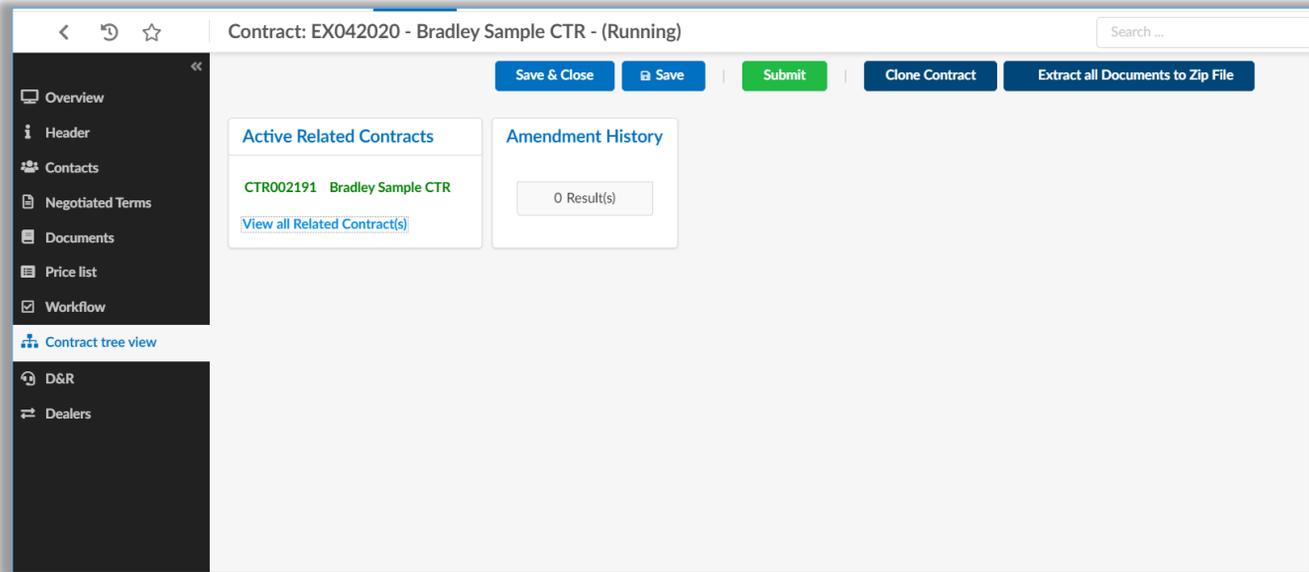
Object	Definition	Additional Info
Commodity	Indicates the commodity code for the item in the Price List	Aligns with UNSPSC naming convention
Contract Tags	Assigns a category or tag to the contract	Example: MBE Set-aside
Contract Type	Displays the contract type listed on the contract Header	
Currency	Displays the currency for the item in the Price List	
EOD Status	Displays the status of the Supplier of the item in the Price List	
Index Number	Displays the number listed on the contract Header	
Link to Catalog	Displays a URL that links to the punchout catalog page for the item	
Name	Displays the name of the item	
Price	Displays the unit price for an item	
Product Code	Displays the product code for an item	Every item is assigned a product
Product Reference	Displays the Supplier's unique naming/numbering convention for the item	
State Contract Number	Displays the contract number assigned by the State vs. Ohio Buys	
Tag	Displays the item tag	May or may not align with Contract Tag
UOM	Displays the unit of measure that in which the item can be purchased	
Validity End Date	Displays the date where State users will be able to purchase the item	Aligns with validity date for contract unless modified
Validity Start Date	Displays the last day State users will be able to purchase the item	Aligns with validity date for contract unless modified

Contract Field Guide: Contract Workflow (1/1)



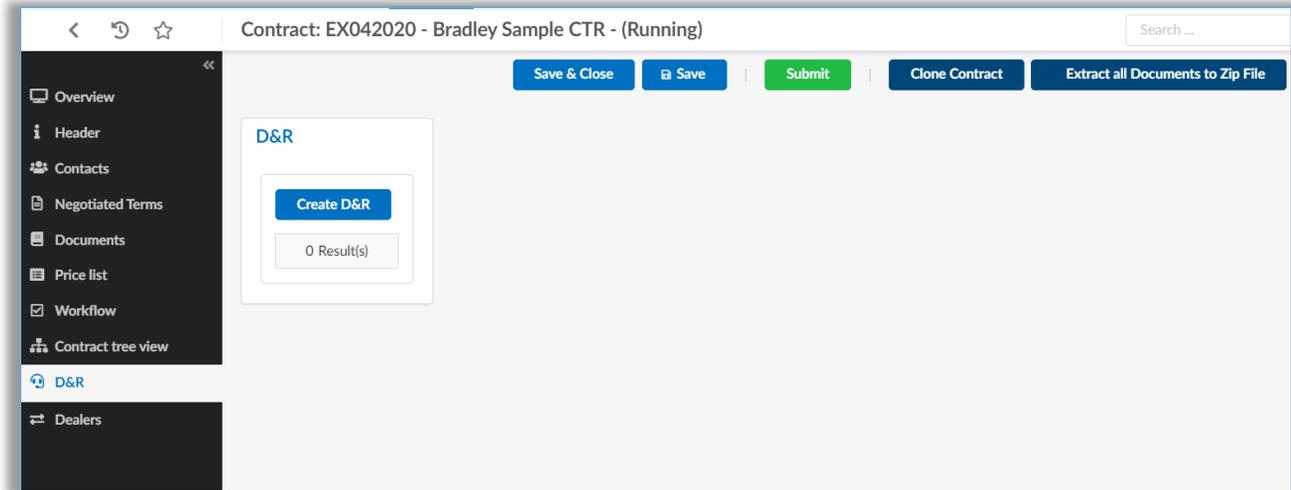
Object	Definition	Additional Info
Activity	Displays the step name within the workflow	
Click or Drag to add files	Allows user to upload attachments to be viewed by other approvers	
Comment	Allows user to enter comments prior to approval	
Created on (UTC-4)	Displays the date the contract reached a particular step within the workflow	
Delegate to	Displays the name of a State user who has had approval rights delegated to them	
Due Date (UTC-4)	Displays a due date for an approver, if applicable	
Initial performer	Displays the name of a State user that was automatically pulled into the workflow step to approve	
Mail History	Displays all communications coming out of Ohio Buys for the contract	
Name	Displays the name of a State user that was automatically pulled into the workflow step to approve	
Previous Approvals & Refusal	Displays all previous approval paths taken by a document	Can give additional detail if a contract was rejected to show the path originally taken and rejection comments
Send to	Allows user to select a name to reference in conjunction with their comment in the Comments field	Does not send an email notification to the recipient of the comment
State	Displays the status of the step within the workflow	Orange = in progress, green = validated, red = rejected
Validated on (UTC-4)	Displays the date/time the step was validated	
Workflow Diagram	Displays the entire workflow for the contract	Orange = in progress, green = validated, red = rejected

Contract Field Guide: Contract Tree View (1/1)



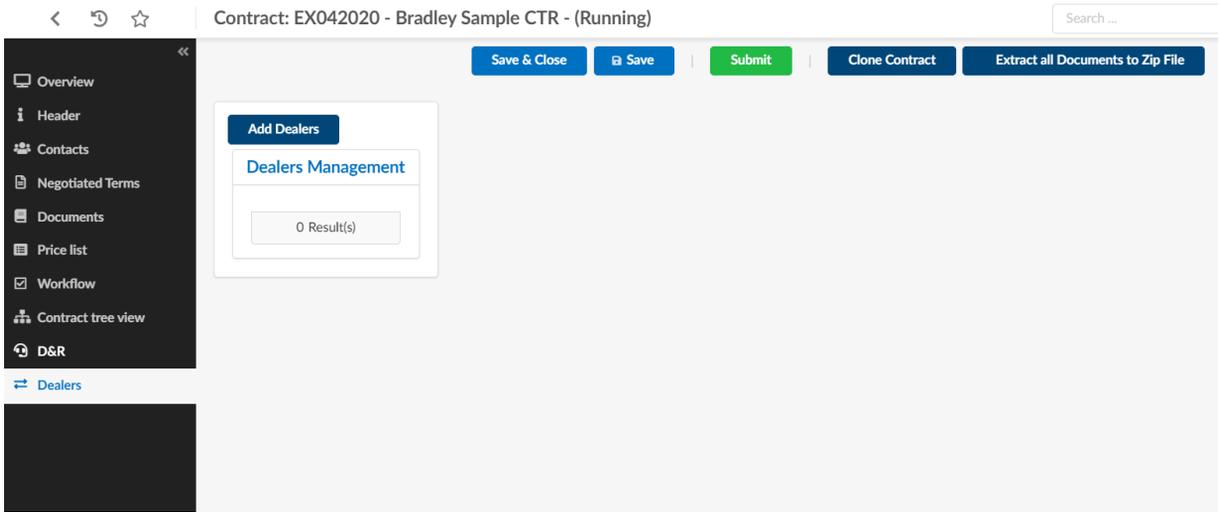
Object	Definition	Additional Info
Active Related Contracts	Displays hyperlinks to any contract related to the current contract	Example: other sub-contracts beneath a master agreement
Amendment History	Displays the history of actions taken to amend the original contract	
View all Related Contracts	Displays all related contracts in list format vs. tree	

Contract Field Guide: Contract D&R (1/1)



Object	Definition	Additional Info
Create D&R	Lists all Determinations & Recommendations, if they exist. Allows the user to create a D&R from the contract.	All D&Rs are managed on a separate page under the "Suppliers" menu

Contract Field Guide: Contract Dealers (1/1)

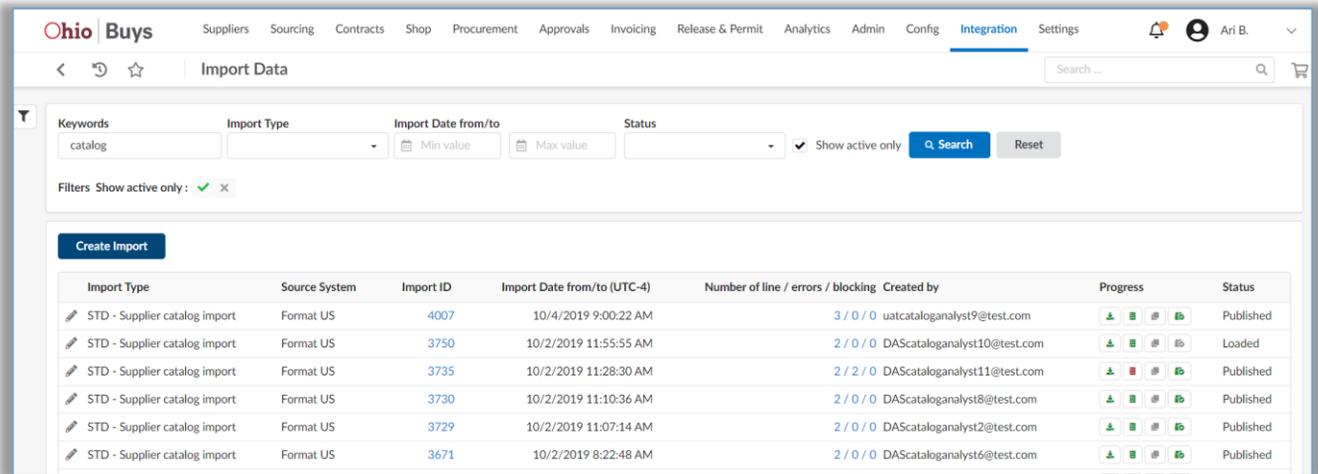


Object	Definition	Additional Info
Add Dealers	Lists any Dealers that have been set up for this agreement. Allows the user to add new Dealers.	Dealers will serve as the Order Supplier during the purchase request process

CATALOG IMPORT FIELD GUIDE

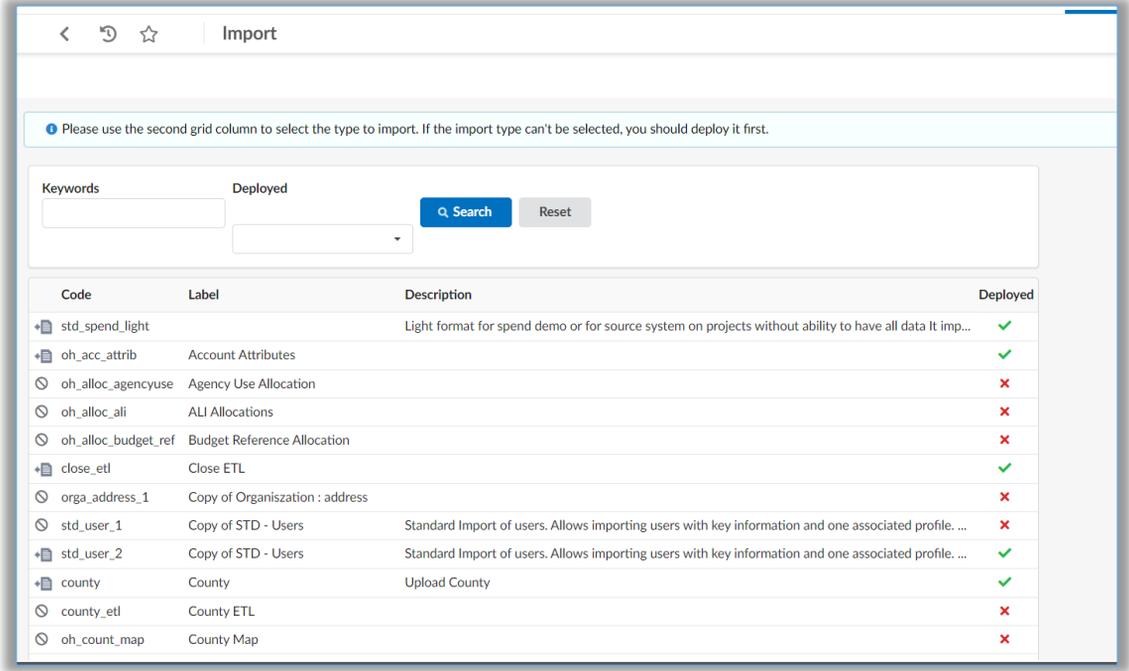


Catalog Import Field Guide: Import Dashboard (1/1)



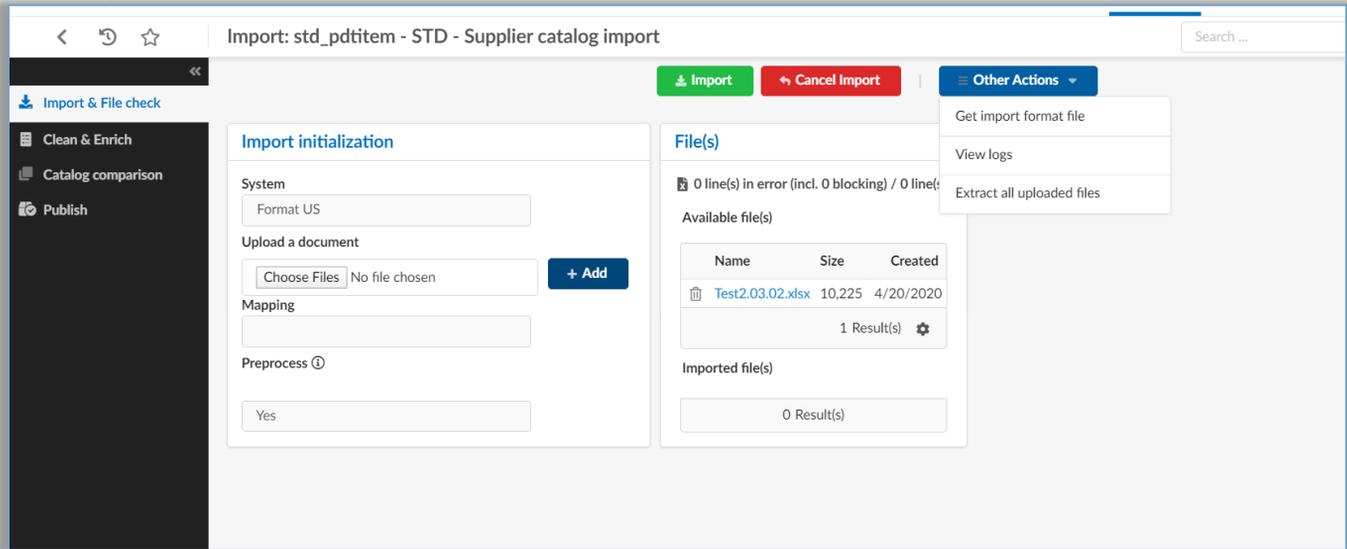
Object	Definition	Additional Info
Created by	Displays the user that created the import	Displays the OH ID
Import Date from/to	Allows the user to search for imports within a certain time period	
Import Date from/to (UTC-4)	Displays the date the import was initiated	
Import ID	Displays the auto-generated import number	
Import Type	Displays the category for the import	
Import Type (search grid)	Allows the user to search for imports within a certain category	
Keywords	Allows the user to search for imports using specific terms or phrases	
Number of line/errors/blocking	Displays the number of lines within the import file, the total number of errors, and the number of blockers preventing the import from being completed	
Progress	Displays the step where the import is currently at	
Show active only	Allows the user to only show imports that are currently in progress	
Source System	Displays the source system for the import	
Status	Displays the status of the import	Aligns with a step in the workflow
Status	Allows the user to search for imports sitting in a certain step within the workflow	

Catalog Import Field Guide: Import Selection (1/1)



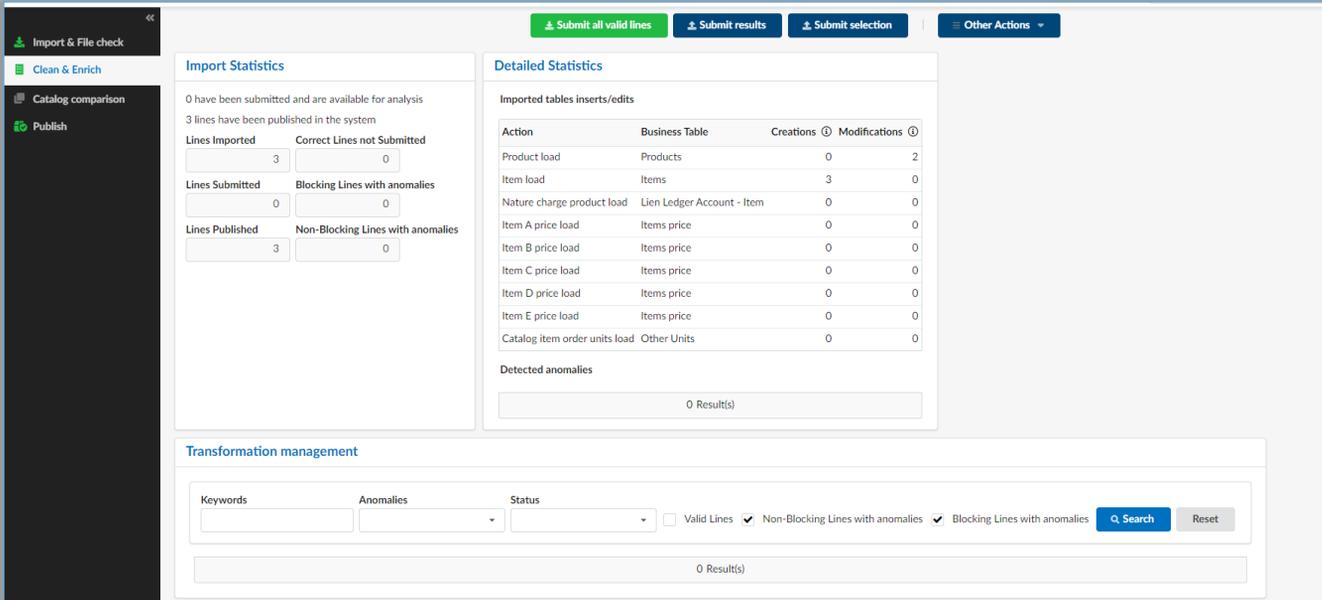
Object	Definition	Additional Info
Code	Displays the code for the import	This code is created by a user when the import itself is created
Deployed	Allows the user to search for imports based on whether they have been activated or not	
Deployed (search results)	Indicates whether the import has been deployed or activated for use	Imports that are not deployed cannot be used
Description	Displays a detailed description of the import	
Keywords	Allows the user to search for an import based on specific words or phrases	
Label	Displays a short description or name for the import	

Catalog Import Field Guide: Import Header (1/1)



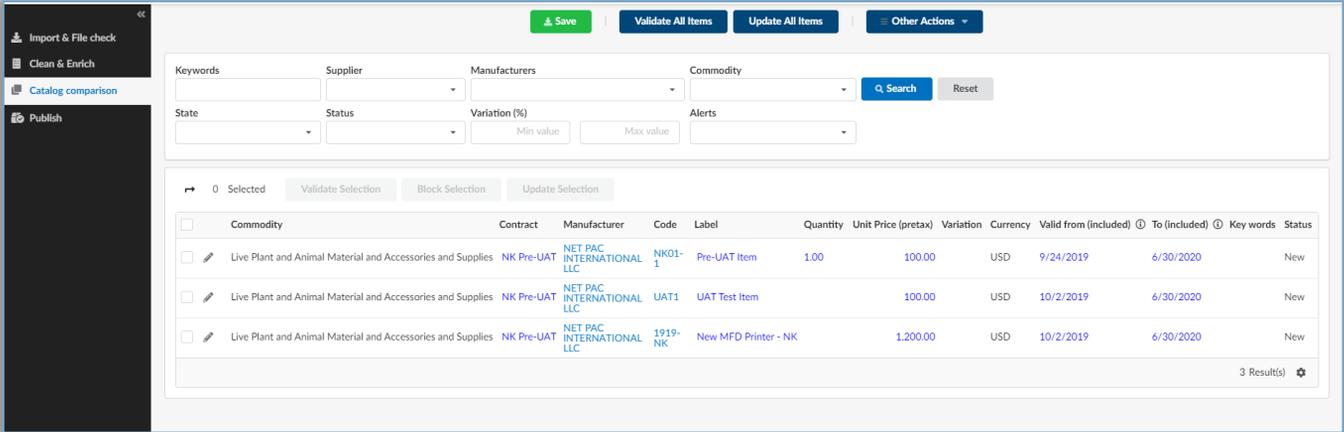
Object	Definition	Additional Info
Files – available file(s)	Displays a list of files selected for upload, but not yet imported	
Files – imported file(s)	Displays all files that have been successfully imported	
Mapping	Displays a pre-determined method for field mapping, if selected	
Preprocess	Indicates whether the format of the file should be checked prior to the user attempting to import it	If selected yes, Ohio Buys will check for data accuracy before the selected files are actually saved and submitted
System	Displays the server or system where the data should be imported	
Upload a document	Allows the user to select a file for importing	Only designated templates should be used. Files must be in .xlsx or .csv format

Catalog Import Field Guide: Clean & Enrich (1/1)



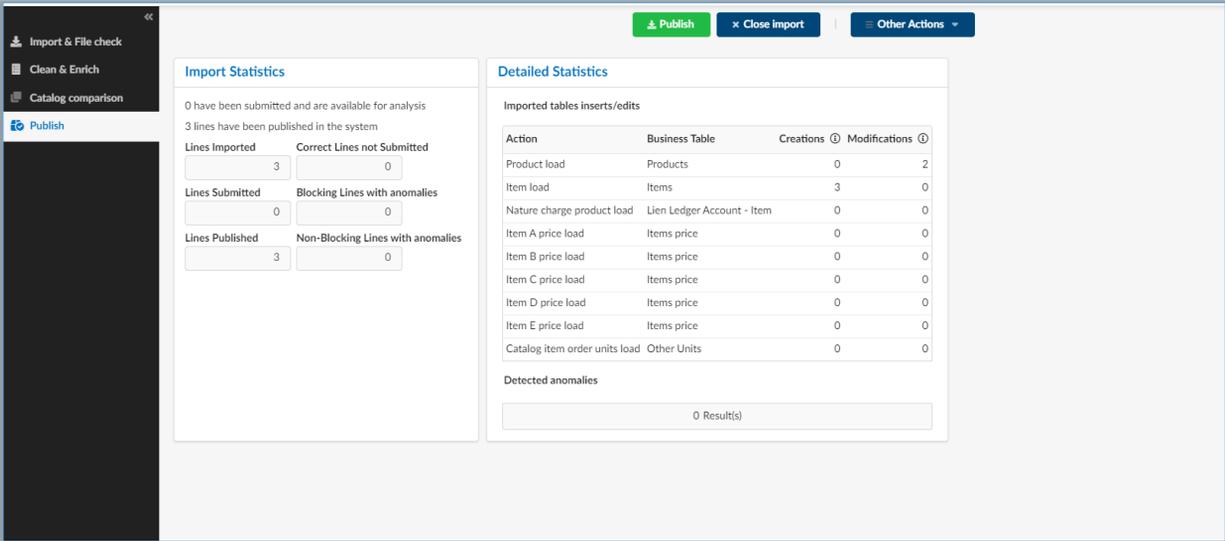
Object	Definition	Additional Info
Blocking Lines with anomalies	Displays number of rows within the imported file that have anomalies that will block the import from being successful	
Correct Lines not Submitted	Displays the number of rows within the imported file that do not have anomalies, but have not been published	
Detailed Statistics - Action	Displays an action taken to the database table via the import	
Detailed Statistics – Business Table	Displays the table that was affected in the database	
Detailed Statistics – Creations	Displays the number of rows created as a result of the action taken to the table	
Detailed Statistics - Modifications	Displays the number of rows modified as a result of the action taken to the table	
Lines Imported	Displays the total number of rows imported into Ohio Buys from the import file	This should match the total number of rows in the import file
Lines Published	Displays the total number of rows published after being imported into Ohio Buys	
Lines Submitted	Displays the number of rows submitted for publishing after having been reviewed for data accuracy	
Non-Blocking Lines with anomalies	Displays number of rows within the imported file that have anomalies that are not blocking the import from being successful	
Transformation Management	Displays search results for rows in import file	Can be used to search for lines with anomalies that need to be corrected

Catalog Import Field Guide: Catalog Comparison (1/1)



Object	Definition	Additional Info
Alerts	Allows user to search for specific items already in the catalog that have certain characteristics or anomalies	Example: item with no price
Commodity	Allows the user to search for items already in the catalog based on commodity code	Aligns with UNSPSC naming convention
Keywords	Allows the user to search for items already in the catalog based on specific terms or phrases	
Manufacturers	Allows the user to search for items already in the catalog based on the manufacturer name	
Search Results	Displays the results of the search with the specified filters	
State	Allows the user to search for items already in the catalog based on whether it was affected by the import	Example: new, modified, deleted
Status	Allows the user to search for items already in the catalog based on the status	Example: approved, draft
Supplier	Allows the user to search for items already in the catalog based on the vendor name	Supplier must have a record in Ohio Buys in order to be selectable
Variation (%)	Allows the user to search for items already in the catalog based on the percentage increase or decrease of the price, if the price was modified by the import	

Catalog Import Field Guide: Publish (1/1)



Object	Definition	Additional Info
Blocking Lines with anomalies	Displays number of rows within the imported file that have anomalies that will block the import from being successful	
Correct Lines not Submitted	Displays the number of rows within the imported file that do not have anomalies, but have not been published	
Detailed Statistics - Action	Displays an action taken to the database table via the import	
Detailed Statistics – Business Table	Displays the table that was affected in the database	
Detailed Statistics – Creations	Displays the number of rows created as a result of the action taken to the table	
Detailed Statistics - Modifications	Displays the number of rows modified as a result of the action taken to the table	
Lines Imported	Displays the total number of rows imported into Ohio Buys from the import file	This should match the total number of rows in the import file
Lines Published	Displays the total number of rows published after being imported into Ohio Buys	
Lines Submitted	Displays the number of rows submitted for publishing after having been reviewed for data accuracy	
Non-Blocking Lines with anomalies	Displays number of rows within the imported file that have anomalies that are not blocking the import from being successful	

CATALOG UPDATE FIELD GUIDE



Catalog Update Field Guide: Create Item (1/3)

The screenshot shows the 'Ohio Buys' interface for creating a new item. The breadcrumb trail is 'Contract: FX042020 - Bradley Sample CTR - (Running)'. The item name is 'Item : SPMS-6 - OAKS Warrants Envelopes'. The form is divided into several sections:

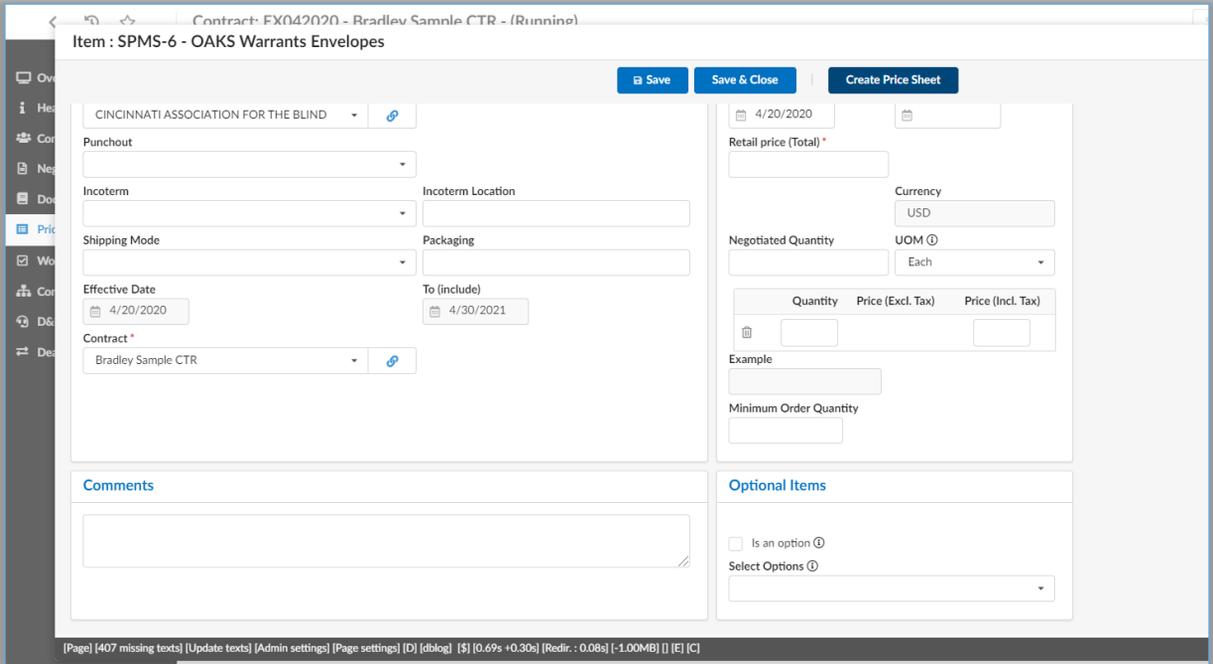
- Product Information:** Fields for Product Label (OAKS Warrants Envelopes), Product Code (SPMS-6), Product Reference, Type (Product), Commodity (44121505 - Specialty envelopes), Characteristics Group, Manufacturer (SPMS), and Link to Catalog (Copy.Center@das.ohio.gov). There is also a checkbox for 'Generic Product'.
- Detailed Description:** A text area containing the description: 'OAKS Warrants size envelopes. (includes printing and warrant stock). ***Please contact State Printing to develop specifications for your needs and obtain a price prior to placing your order at Copy.Center@das.ohio.gov.' There is a 'Click or Drag to add files' button.
- File Upload:** A section with a 'Click or Drag to add a picture' button and the Ohio Department of Administrative Services logo.
- Keywords:** A text area for entering keywords.
- Summary:** A text area containing the summary: 'OAKS Warrants Envelopes'.

Object	Definition	Additional Info
Characteristics Group	Associates the product with a characteristics group	Dictates whether the shopper will be required to complete additional fields or order features during the request
Commodity	Associates the product with a commodity group	Aligns with the UNSPSC naming convention
Description	Detailed description of the product	
File Upload	Allows the user to upload a picture of the item	
Generic Product	Indicates whether the product is generic	Example: books. Does not indicate the type of book or manufacturer. Typically set at \$0 in the catalog and changed when the request is created
Keywords	Displays keywords associated with the product	These terms or phrases allow a user to have a better search experience when shopping
Link to Catalog	Contains a link to the catalog on the vendor's website	
Manufacturer	Displays the name of the Contractor that makes the product	May not align with who will fulfill the purchase orders
Product Code	Displays the unique number for the product	
Product label	Displays the name of the product	This is a short description
Product Reference	Displays the unique number for the product per the vendor's naming convention	
Summary	Displays a brief summary of the product or service	Visible to shoppers
Type	Indicates whether the product is a good or service	

Catalog Field Guide: Create Item (2/3)

Object	Definition	Additional Info
Contract	Links the item to an existing contract shell within Ohio Buys	Mandatory. Contract must be created prior to creating the item
Currency	Displays the currency that the item will be purchased in	
Effective Date	Lists the effective date for the item	Aligns with the effective date of the associated contract
Incoterm	International Commerce Terms are a series of pre-defined commercial terms published by the International Chamber of Commerce relating to international commercial law	Example: free carrier, free on board
Incoterm Location	Displays the location where the Incoterm is applicable	Aligns with international laws
Item Code	Unique numbering for the item according to the State's naming convention	
Name	Label or name for the item	
Packaging	Details on how the good is packaged	
Punchout	Links the item to a punchout catalog	
Retail Price (Total)	Unit price for each item	
Shipping Mode	Delivery method for shipping orders	
Status	Status of the item	Example: Draft, Approved
Supplier	Links item to an existing vendor in Ohio Buys	Supplier record must exist prior to item creation
To (include)	End date for the item	Aligns with end date for the contract
Validity End Date	Date item is available for purchase	Must be within the Effective Date and To (include) date
Validity Start Date	Last day item is available for purchase	Must be within the Effective Date and To (include) date

Catalog Field Guide: Create Item (3/3)



Object	Definition	Additional Info
Comments	Displays internal comments related to this item	Not visible to shoppers
Example	Displays an example calculation if tiered pricing terms are entered	Auto-calculated
Is an option	Indicates whether this item is an option for another item. An optional item typically makes more sense when purchased along with another item	Options are supplemental items. Example: charging cord is an option for laptop. Making the item an option will restrict it from being purchased alone
Minimum Order Quantity	Displays the minimum number of units that must be purchased in a single request for the purchase order to go through	
Negotiated Quantity	If a pre-determined quantity is negotiated and outlined in the contract, then it should be entered here	
Price (Excl. Tax)	Unit price less tax for that tier	
Price (Incl. Tax)	Unit price including tax for that tier	
Quantity	Quantity associated with a tier when a tiered pricing structure is enabled	
Select Options	Displays items that are options or supplemental to this item	
UOM	Unit of measure for orders	

Version Control

Version	Publish Date	Summary of Updates	Pages Updated
1.0		Initial draft	All
1.1	07/24/20	Release 2, Sprint 7 updates	5,43