Managing Hosted Catalogs Ohio|Buys

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Audience: Users responsible for managing hosted goods and/or services catalogs within Ohio|Buys.
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Overview: Contract and Catalog Analysts are responsible for the management and maintenance of the catalogs that are offered as part of a contract with a State of Ohio Supplier. As part of Ohio|Buys, a Supplier’s catalog of goods and/or services can be maintained as either a hosted or a punchout catalog.

A hosted catalog is a catalog maintained by the State within Ohio|Buys and the items associated with a hosted catalog are searchable directly within Ohio|Buys.

Hosted catalogs are made up of catalog items, which are comprised of a product and an item sheet:

- Contains the manufacturing information that apply regardless of where the item is purchased from
- Captures metadata on the product including: Product Code, Label, Manufacturer, Commodity
- Captures additional description details of the product and allows the ability to attach images
- Does not contain an indication of the price or the possible Supplier(s)

- Contains more specific information, including the details around the Suppliers that have the item within their catalog for purchase
- Each item sheet has a specific price for a given period and includes the Supplier information
- Multiple item sheets can exist for a single product
- Tiered pricing is available
- Item must be paired to a product

A punchout catalog is an integrated external link to a Supplier’s web-based catalog. Users browse the Supplier’s catalog and their items are automatically returned to their Ohio Buys cart. Some punchout catalog items are searchable directly within Ohio Buys, but this is dependent upon the supplier's technical capabilities.
In This Document (Process Flow):

**Process Flow:** After a contract is created in Ohio|Buys, Contract and Catalog Analysts can work with State Suppliers to create a hosted catalog using a data import process or by adding the item directly in Ohio|Buys. Below is the actual workflow that you will see in Ohio|Buys when completing the Hosted Catalog Upload process. For clarity, we have color-coded the workflow in this slide to allow you to easily see which role is involved with each step of the process:

![Workflow Diagram]

This learner guide walks through the following steps of the Catalog Upload process:

1. **File Upload:** Suppliers or Catalog Analysts log in to Ohio Buys and import a catalog by uploading a completed Excel template. If a Supplier uploads the catalog, assigned Catalog Analysts will be notified via email to review and format the catalog. At this point in time, Agency Catalog Analysts should submit an OSS ticket to seek assistance with uploading a prepared catalog template.

2. **Catalog Enablement:** If a Supplier uploaded the catalog, the Catalog Enablement step is engaged. During this step, a Catalog Analyst makes sure all entries are correct and the data is valid for the hosted catalog items.

3. **Contract Analyst:** After a Catalog Analyst has finished Catalog Enablement, the catalog upload is routed to the associated Contract Analyst for a final review. At this step, the Contract Analyst can either publish the contract or reject the submitted changes.

Details regard the Direct Purchase Contract process can be found in the Creating a Direct Purchase Catalog job aid.
In This Document (Scenarios):

**Scenarios:** Please refer to the below scenarios and steps when making updates to a contract’s price list in Ohio|Buys. In the event the Item Grid of a solicitation was carried over into a new contract, Catalog Analysts should follow the steps outlined for New Contract Price Updates. It is the responsibility of an agency’s Catalog Analyst to work with Suppliers to prepare, update, and manage the catalog items that are offered as part of a State contract.

**New Contract Price Updates:**
1. Carry over the relevant solicitation items into the new contract’s price list.
2. Export the price list of the new contract via the Price List tab of the contract.
3. Update the contract’s price list in Excel.
4. Import and submit the revised contract’s price list into Ohio|Buy via the Hosted Catalog Upload process.
5. Review the Differing Report tab of the catalog upload and click the checkbox next to all the items that you want to replace the previous with the new (can check all).
6. Select an option to deactivate the previous items.
7. Publish the revised contract.

**Negotiations Price Updates (Contract is in Negotiation in Progress status):**
1. Determine who will be responsible for updating pricing (i.e., the Supplier or the State).
2. If Supplier:
   a) Supplier exports the current price list of the new contract via the Price List tab of the contract.
   b) Update the contract’s price list in Excel.
   c) Import and submit the price list as a version in the Documents tab of the contract.

*(Continued on the next page)*
In This Document (Scenarios):

3. If State:
   a) Agency Catalog Analyst exports the current price list of the new contract via the Price List tab of the contract.
   b) Update the contract’s price list in Excel.
   c) Import and submit the price list as a version in the Documents tab of the contract as a Supplier Confidential document.
   d) Click Send back to Supplier Review.

4. Once no other changes need to be made to the price list, download the final version of the price list spreadsheet from the Documents tab of the contract.

5. Import and submit the revised contract’s price list into Ohio|Buy via the Hosted Catalog Upload process.

6. Review the Differing Report tab of the catalog upload and click the checkbox next to all the items that you want to replace the previous with the new (can check all).

7. Select an option to deactivate the previous items.

8. Publish the revised contract.

Amendment Price Updates:

1. Create a contract amendment.

2. Export the price list of the new contract via the Price List tab of the contract.

3. Update the contract’s price list in Excel.

4. Import and submit the revised contract’s price list into Ohio|Buy via the Hosted Catalog Upload process.

5. Review the Differing Report tab of the catalog upload and click the checkbox next to all the items that you want to replace the previous with the new (can check all).

6. Select an option to deactivate the previous items.

7. Publish the revised contract.

For details on how to upload a contract’s price list as a hosted catalog and how to complete the Hosted Catalog Upload process, please refer to the Uploading a Hosted Catalog and Publishing a Hosted Catalog sections of this guide.
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. At this point in time, Agency Catalog Analysts should submit an OSS ticket to seek assistance with uploading a prepared catalog 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](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 in to Ohio|Buys. It is important to use the Excel file downloaded directly from Ohio|Buys to complete the data import for your 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 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**.
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

**Step 2:**
On the Import page, click the **Add a New Catalog Import** button.

---

2

**Step 3:**

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.

b) Once you have completed the mandatory and optional fields, click the **Save** button towards the top of the Catalog Sheet page.
Step-by-Step Instructions for Uploading a Hosted Catalog

If you have an existing catalog and would like to make updates to it, please follow these steps, otherwise download and prepare the Catalog Template from the State website at https://das.ohio.gov/Divisions/General-Services/Procurement-Services/eProcurement#5223484-supplier

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

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.

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

c) Check to ensure the name of the updated Excel file appears next to the Choose File button.
d) Click the + Add button.

![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.

![Submit Button]

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.

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.

1

- 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.

2

- b) Once you find the correct catalog sheet, click the Object link.
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.

▲ 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.

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.

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**.
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
Publishing a hosted catalog requires a catalog sheet to have been previously uploaded in to 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.

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.

1

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.

b) Once you find the correct catalog sheet, click the Object hyperlink.
Step 3

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.

▲ 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.

Step 4

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

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.
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

1. 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.

2. From the Browse Contracts results page, you have two primary search and filter methods:
   a) You can manually scroll through the contracts automatically displayed
   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 Creating a Hosted Catalog Item

Navigate to the **Price List** tab.

4

5

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.
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.
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](#)”.  

### Step-By-Step Instructions for Creating a Hosted Catalog Item

1. **Create a Hosted Catalog Item**
2. **Step Instructions for Submitting a Hosted Catalog Pcard Purchase**
3. **Step Instructions for Creating 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

1. 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**.

2. 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
   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

4a) On the Price List tab, a complete list of items associated with the specific contract you chose are visible.

4b) Locate the item you want to update and select the **Pencil** (✏️) icon next to the item.

4c) 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.
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.

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.

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.

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 ( ).
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

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.
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 (    ).

6

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

7

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
Punchout Catalogs

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.

For assistance with setting up a punch-out catalog, please submit a help desk case by contacting the Ohio Shared Services Contact Center via email (ohiosharedservices@ohio.gov) or phone (877-644-6771).

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
<table>
<thead>
<tr>
<th>Object</th>
<th>Definition</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created by</td>
<td>Displays the user that created the import</td>
<td>Displays the OH</td>
</tr>
<tr>
<td>Import Date from/to</td>
<td>Allows the user to search for imports within a certain time period</td>
<td></td>
</tr>
<tr>
<td>Import Date from/to (UTC-4)</td>
<td>Displays the date the import was initiated</td>
<td></td>
</tr>
<tr>
<td>Import ID</td>
<td>Displays the auto-generated import number</td>
<td></td>
</tr>
<tr>
<td>Import Type</td>
<td>Displays the category for the import</td>
<td></td>
</tr>
<tr>
<td>Import Type (search grid)</td>
<td>Allows the user to search for imports within a certain category</td>
<td></td>
</tr>
<tr>
<td>Keywords</td>
<td>Allows the user to search for imports using specific terms or phrases</td>
<td></td>
</tr>
<tr>
<td>Number of line/errors/blocking</td>
<td>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</td>
<td></td>
</tr>
<tr>
<td>Progress</td>
<td>Displays the step where the import is currently at</td>
<td></td>
</tr>
<tr>
<td>Show active only</td>
<td>Allows the user to only show imports that are currently in progress</td>
<td></td>
</tr>
<tr>
<td>Source System</td>
<td>Displays the source system for the import</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>Displays the status of the import</td>
<td>Aligns with a step in the workflow</td>
</tr>
<tr>
<td>Status</td>
<td>Allows the user to search for imports sitting in a certain step within the workflow</td>
<td></td>
</tr>
</tbody>
</table>
### Object Selection Guide

<table>
<thead>
<tr>
<th>Object</th>
<th>Definition</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Code</strong></td>
<td>Displays the code for the import</td>
<td>This code is created by a user when the import itself is created</td>
</tr>
<tr>
<td><strong>Deployed</strong></td>
<td>Allows the user to search for imports based on whether they have been activated or not</td>
<td></td>
</tr>
<tr>
<td><strong>Deployed (search results)</strong></td>
<td>Indicates whether the import has been deployed or activated for use</td>
<td>Imports that are not deployed cannot be used</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Displays a detailed description of the import</td>
<td></td>
</tr>
<tr>
<td><strong>Keywords</strong></td>
<td>Allows the user to search for an import based on specific words or phrases</td>
<td></td>
</tr>
<tr>
<td><strong>Label</strong></td>
<td>Displays a short description or name for the import</td>
<td></td>
</tr>
</tbody>
</table>
### Catalog Import Field Guide: Import Header (1/1)

#### Import initialization
- **System**: Format US
- **Upload a document**: Choose Files - No file chosen
- **Preprocess**: Yes

#### File(s)
- **Available file(s)**:
  - Name: Test2.03.02.xlsx
  - Size: 10.22KB
  - Created: 4/20/2020
  - 1 Result(s)
- **Imported file(s)**: 0 Result(s)

#### Other Actions
- Get import format file
- View logs
- Extract all uploaded files

<table>
<thead>
<tr>
<th>Object</th>
<th>Definition</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Files – available file(s)</td>
<td>Displays a list of files selected for upload, but not yet imported</td>
<td></td>
</tr>
<tr>
<td>Files – imported file(s)</td>
<td>Displays all files that have been successfully imported</td>
<td></td>
</tr>
<tr>
<td>Mapping</td>
<td>Displays a pre-determined method for field mapping, if selected</td>
<td>If selected yes, Ohio</td>
</tr>
<tr>
<td>Preprocess</td>
<td>Indicates whether the format of the file should be checked prior to the user attempting to import it</td>
<td></td>
</tr>
<tr>
<td>System</td>
<td>Displays the server or system where the data should be imported</td>
<td>Only designated templates should be used. Files must be in .xlsx or .csv format</td>
</tr>
<tr>
<td>Upload a document</td>
<td>Allows the user to select a file for importing</td>
<td></td>
</tr>
<tr>
<td>Object</td>
<td>Definition</td>
<td>Additional Info</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------</td>
</tr>
<tr>
<td>Blocking Lines with anomalies</td>
<td>Displays number of rows within the imported file that have anomalies that will block the import from being successful</td>
<td></td>
</tr>
<tr>
<td>Correct Lines not Submitted</td>
<td>Displays the number of rows within the imported file that do not have anomalies, but have not been published</td>
<td></td>
</tr>
<tr>
<td>Detailed Statistics - Action</td>
<td>Displays an action taken to the database table via the import</td>
<td></td>
</tr>
<tr>
<td>Detailed Statistics – Business Table</td>
<td>Displays the table that was affected in the database</td>
<td></td>
</tr>
<tr>
<td>Detailed Statistics – Creations</td>
<td>Displays the number of rows created as a result of the action taken to the table</td>
<td></td>
</tr>
<tr>
<td>Detailed Statistics - Modifications</td>
<td>Displays the number of rows modified as a result of the action taken to the table</td>
<td></td>
</tr>
<tr>
<td>Lines Imported</td>
<td>Displays the total number of rows imported into Ohio</td>
<td>Buys from the import file</td>
</tr>
<tr>
<td>Lines Published</td>
<td>Displays the total number of rows published after being imported into Ohio</td>
<td>Buys</td>
</tr>
<tr>
<td>Lines Submitted</td>
<td>Displays the number of rows submitted for publishing after having been reviewed for data accuracy</td>
<td></td>
</tr>
<tr>
<td>Non-Blocking Lines with anomalies</td>
<td>Displays number of rows within the imported file that have anomalies that are not blocking the import from being successful</td>
<td>Can be used to search for lines with anomalies that need to be corrected</td>
</tr>
<tr>
<td>Transformation Management</td>
<td>Displays search results for rows in import file</td>
<td></td>
</tr>
<tr>
<td>Object</td>
<td>Definition</td>
<td>Additional Info</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------------------------------------------------</td>
<td>--------------------------------------</td>
</tr>
<tr>
<td>Alerts</td>
<td>Allows user to search for specific items already in the catalog that have certain characteristics or anomalies</td>
<td>Example: item with no price</td>
</tr>
<tr>
<td>Commodity</td>
<td>Allows the user to search for items already in the catalog based on commodity code</td>
<td>Aligns with UNSPSC naming convention</td>
</tr>
<tr>
<td>Keywords</td>
<td>Allows the user to search for items already in the catalog based on specific terms or phrases</td>
<td></td>
</tr>
<tr>
<td>Manufacturers</td>
<td>Allows the user to search for items already in the catalog based on the manufacturer name</td>
<td></td>
</tr>
<tr>
<td>Search Results</td>
<td>Displays the results of the search with the specified filters</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td>Allows the user to search for items already in the catalog based on whether it was affected by the import</td>
<td>Example: new, modified, deleted</td>
</tr>
<tr>
<td>Status</td>
<td>Allows the user to search for items already in the catalog based on the status</td>
<td>Example: approved, draft</td>
</tr>
<tr>
<td>Supplier</td>
<td>Allows the user to search for items already in the catalog based on the vendor name</td>
<td>Supplier must have a record in Ohio</td>
</tr>
<tr>
<td>Variation (%)</td>
<td>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</td>
<td></td>
</tr>
<tr>
<td>Object</td>
<td>Definition</td>
<td>Additional Info</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
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</tr>
<tr>
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<td></td>
</tr>
<tr>
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</tr>
</tbody>
</table>
CATALOG UPDATE
FIELD GUIDE
# Catalog Update Field Guide: Create Item (1/3)

## Object

<table>
<thead>
<tr>
<th>Object</th>
<th>Definition</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Characteristics Group</td>
<td>Associates the product with a characteristics group</td>
<td>Dictates whether the shopper will be required to complete additional fields or order features during the request</td>
</tr>
<tr>
<td>Commodity</td>
<td>Associates the product with a commodity group</td>
<td>Aligns with the UNSPSC naming convention</td>
</tr>
<tr>
<td>Description</td>
<td>Detailed description of the product</td>
<td></td>
</tr>
<tr>
<td>File Upload</td>
<td>Allows the user to upload a picture of the item</td>
<td></td>
</tr>
<tr>
<td>Generic Product</td>
<td>Indicates whether the product is generic</td>
<td>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</td>
</tr>
<tr>
<td>Keywords</td>
<td>Displays keywords associated with the product</td>
<td>These terms or phrases allow a user to have a better search experience when shopping</td>
</tr>
<tr>
<td>Link to Catalog</td>
<td>Contains a link to the catalog on the vendor’s website</td>
<td></td>
</tr>
<tr>
<td>Manufacturer</td>
<td>Displays the name of the Contractor that makes the product</td>
<td>May not align with who will fulfill the purchase orders</td>
</tr>
<tr>
<td>Product Code</td>
<td>Displays the unique number for the product</td>
<td></td>
</tr>
<tr>
<td>Product label</td>
<td>Displays the name of the product</td>
<td>This is a short description</td>
</tr>
<tr>
<td>Product Reference</td>
<td>Displays the unique number for the product per the vendor’s naming convention</td>
<td></td>
</tr>
<tr>
<td>Summary</td>
<td>Displays a brief summary of the product or service</td>
<td>Visible to shoppers</td>
</tr>
<tr>
<td>Type</td>
<td>Indicates whether the product is a good or service</td>
<td></td>
</tr>
<tr>
<td>Object</td>
<td>Definition</td>
<td>Additional Info</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Contract</td>
<td>Links the item to an existing contract shell within Ohio</td>
<td>Buys</td>
</tr>
<tr>
<td>Currency</td>
<td>Displays the currency that the item will be purchased in</td>
<td></td>
</tr>
<tr>
<td>Effective Date</td>
<td>Lists the effective date for the item</td>
<td>Aligns with the effective date of the associated contract</td>
</tr>
<tr>
<td>Incoterm</td>
<td>International Commerce Terms are a series of pre-defined commercial terms published by the International Chamber of Commerce relating to international commercial law</td>
<td>Example: free carrier, free on board</td>
</tr>
<tr>
<td>Incoterm Location</td>
<td>Displays the location where the Incoterm is applicable</td>
<td>Aligns with international laws</td>
</tr>
<tr>
<td>Item Code</td>
<td>Unique numbering for the item according to the State’s naming convention</td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Label or name for the item</td>
<td></td>
</tr>
<tr>
<td>Packaging</td>
<td>Details on how the good is packaged</td>
<td></td>
</tr>
<tr>
<td>Punchout</td>
<td>Links the item to a punchout catalog</td>
<td></td>
</tr>
<tr>
<td>Retail Price (Total)</td>
<td>Unit price for each item</td>
<td></td>
</tr>
<tr>
<td>Shipping Mode</td>
<td>Delivery method for shipping orders</td>
<td></td>
</tr>
<tr>
<td>Status</td>
<td>Status of the item</td>
<td>Example: Draft, Approved</td>
</tr>
<tr>
<td>Supplier</td>
<td>Links item to an existing vendor in Ohio</td>
<td>Buys</td>
</tr>
<tr>
<td>To (include)</td>
<td>End date for the item</td>
<td>Aligns with end date for the contract</td>
</tr>
<tr>
<td>Validity End Date</td>
<td>Date item is available for purchase</td>
<td>Must be within the Effective Date and To (include) date</td>
</tr>
<tr>
<td>Validity Start Date</td>
<td>Last day item is available for purchase</td>
<td>Must be within the Effective Date and To (include) date</td>
</tr>
</tbody>
</table>
### Catalog Field Guide: Create Item (3/3)

<table>
<thead>
<tr>
<th>Object</th>
<th>Definition</th>
<th>Additional Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comments</td>
<td>Displays internal comments related to this item</td>
<td>Not visible to shoppers</td>
</tr>
<tr>
<td>Example</td>
<td>Displays an example calculation if tiered pricing terms are entered</td>
<td>Auto-calculated</td>
</tr>
<tr>
<td>Is an option</td>
<td>Indicates whether this item is an option for another item. An optional item typically makes more sense when purchased along with another item</td>
<td>Options are supplemental items. Example: charging cord is an option for laptop. Making the item an option will restrict it from being purchased alone</td>
</tr>
<tr>
<td>Minimum Order Quantity</td>
<td>Displays the minimum number of units that must be purchased in a single request for the purchase order to go through</td>
<td></td>
</tr>
<tr>
<td>Negotiated Quantity</td>
<td>If a pre-determined quantity is negotiated and outlined in the contract, then it should be entered here</td>
<td></td>
</tr>
<tr>
<td>Price (Excl. Tax)</td>
<td>Unit price less tax for that tier</td>
<td></td>
</tr>
<tr>
<td>Price (Incl. Tax)</td>
<td>Unit price including tax for that tier</td>
<td></td>
</tr>
<tr>
<td>Quantity</td>
<td>Quantity associated with a tier when a tiered pricing structure is enabled</td>
<td></td>
</tr>
<tr>
<td>Select Options</td>
<td>Displays items that are options or supplemental to this item</td>
<td></td>
</tr>
<tr>
<td>UOM</td>
<td>Unit of measure for orders</td>
<td></td>
</tr>
</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>1.0</td>
<td>10/15/20</td>
<td>Initial draft</td>
<td>All</td>
</tr>
</tbody>
</table>