How to Create a Contract Shell

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 **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 on Page 7 of this job aid for an overview of the varying types and who can create each type of contract.

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.

   ▲ It is suggested to populate the **Supplier** field with the Supplier’s name associated with the contract shell.

   b) Populate the remaining non-mandatory fields as necessary (e.g., Market Type, Index Number, Minimum Contract Purchase Amount).
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

Step 1

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

- **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**.
  2. Under Organizational Hierarchy, click the **Expand** (▼) icon next to OHIO. If you wanted to the make contract a statewide contract, click the **Checkbox** (□) icon next to OHIO.
  3. Click the **Expand** (▼) icon to see the list of State Agencies.
  4. In this example, we want to select OH Department of Mental Health and Addiction Services and include all of the divisions that are a part of it. Therefore, click the **Hand** (◖) icon next to it to select all of the values under it.
  5. In our example, you can see 17 values have been selected. If you only clicked the Checkbox icon, you would have only selected one value.
  6. Click the **X** (✖️) icon once you have selected your organizations.

- **Commodities field**: Indicate the commodities tied to the contract based on the scope of the contract.
  1. To effectively select the Commodities, input your keywords in the Commodities field and select the applicable commodity from the relevant results.
  ▲ 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.
5

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 or renewal contract end date).

6

In the **Review and Renewal Schedule** section, complete the fields that are applicable to your contract shell.

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

a) To add a Supplier contact:
   1) Click **Select Existing Contact**
      ▲ If the associated Supplier contact does not exist in Ohio Buys, you can click **Create a New Supplier Contact** and manually add them.
   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) 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, and/or delete the contract shell. Only one individual can have the Responsible role assigned to them.
      • **Contributor**: They can view and/or modify the contract shell.
      • **SME**: They can only view the contract shell.
a) Navigate to the **Dealers** tab to add a dealer associated with the contract shell. To add a dealer, 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 on a contract, but a dealer would be a Supplier that can offer Lenovo’s laptops to 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 = State of Ohio’s unique identifier for Suppliers.

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**.

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 or update the catalog items associated with the contract.

▲ Please refer to the Hosted Catalog Management course to create, edit, or delete items.

- **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: Displays Determination & Recommendations (D&R) completed for the contract.

▲ If you want to start the D&R process, click **Create D&R**.

Once you have populated the mandatory fields and non-mandatory fields as necessary, click **Submit** to finish creating the contract shell.
To review and export a contract’s price list, find and open the contract and navigate to the **Price List** tab.

The items associated with the contract are visible.

▲ If you want to review a specific item’s information, click the Pencil icon next to the associated line item.

▲ If you want to edit and create items, reference the Managing Hosted Catalogs training courses and associated job aids.

To export the price list, right click anywhere in the header and select **Download in Excel Format**.

The Excel file downloads to your computer. Find and open the file.
## How to Create a Contract Shell

### Contract Types and Sub-Contract Types

<table>
<thead>
<tr>
<th>Contract Type</th>
<th>Contract Sub-Type</th>
<th>Who Can Create This Contract Type?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Competitive Selection</strong></td>
<td>a) Enterprise Contract</td>
<td>• DAS Office of Procurement Services</td>
</tr>
<tr>
<td></td>
<td>b) Multi-Agency Contract</td>
<td>• DAS Office of State Printing and Mail Services</td>
</tr>
<tr>
<td></td>
<td>c) Single Agency Contract</td>
<td></td>
</tr>
<tr>
<td><strong>Competitive Selection-Two Phase</strong></td>
<td>a) Enterprise Contract Pre-Quals</td>
<td>• DAS Office of Procurement Services</td>
</tr>
<tr>
<td></td>
<td>b) Multi-Agency Contract Pre-Quals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c) Single Agency Contract Pre-Quals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>d) Enterprise Contract Quote</td>
<td></td>
</tr>
<tr>
<td></td>
<td>e) Multi-Agency Contract Quote</td>
<td></td>
</tr>
<tr>
<td></td>
<td>f) Single Agency Contract Quote</td>
<td></td>
</tr>
<tr>
<td><strong>Waiver of Competitive Selection</strong></td>
<td>a) Commercial Lease Agreement</td>
<td>• DAS Office of Procurement Services (for all contract sub-types except for Commercial Lease Agreements)</td>
</tr>
<tr>
<td></td>
<td>b) Master Cloud Services Agreement</td>
<td>• DAS Office of Real Estate and Planning (only for Commercial Lease Agreements)</td>
</tr>
<tr>
<td></td>
<td>c) Master License Agreement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>d) Master Maintenance Agreement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>e) Master Services Agreement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>f) State Term Schedule-S&amp;LG, GSA, DOD, or VA</td>
<td></td>
</tr>
<tr>
<td><strong>Agency Administered</strong></td>
<td>a) Personal Service Agreement</td>
<td>All State Agencies (excluding DAS Office of Procurement Services)</td>
</tr>
<tr>
<td></td>
<td>b) General Services Agreement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c) General Goods Agreement</td>
<td></td>
</tr>
<tr>
<td></td>
<td>d) Professional Service Agreement</td>
<td></td>
</tr>
<tr>
<td><strong>Requisite Program</strong></td>
<td>a) DRC-Ohio Penal Industries (OPI)</td>
<td>a) OPI</td>
</tr>
<tr>
<td></td>
<td>b) DAS-Community Rehabilitation Program (CRP)</td>
<td>b) CRP</td>
</tr>
<tr>
<td></td>
<td>c) OOD-Business Enterprise Program</td>
<td>c) OOD-Business Enterprise Program</td>
</tr>
<tr>
<td></td>
<td>d) DAS-Office of Information Technology (OIT)</td>
<td>d) OIT</td>
</tr>
<tr>
<td></td>
<td>e) DAS-State Printing and Mail Services</td>
<td>e) DAS-State Printing and Mail Services</td>
</tr>
<tr>
<td></td>
<td>f) DMH-Ohio Pharmacy Services</td>
<td>f) DMH-Ohio Pharmacy Services</td>
</tr>
<tr>
<td></td>
<td>g) Ohio Facilities Construction Commission (OFCC)</td>
<td>g) OFCC</td>
</tr>
<tr>
<td></td>
<td>h) OFCC Local Agency Administered Agreement</td>
<td>h) OFCC</td>
</tr>
<tr>
<td><strong>Comparison</strong></td>
<td>N/A</td>
<td>The purpose of this is to allow DAS to input items offered on punch-out catalogs so price audits can be conducted to ensure pricing offered on punch-out catalogs is consistent with contracted price.</td>
</tr>
</tbody>
</table>

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