Using Ohio|Buys as a Co-op User

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Audience: Co-op users who would like to access Ohio|Buys to submit Requests to Purchase and/or exceptions (i.e., CTVs) or post public notice solicitations.
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Overview: This learner guide covers the core activities related to using Ohio|Buys as a Co-op user. Ohio|Buys will fundamentally change how the State of Ohio and its Co-ops purchases goods and services by transforming procurement processes, policies, and contracts through the implementation of an innovative, proven, and secure cloud-based solution.

Processes Covered:

1) Accessing and Navigating Ohio|Buys: To access Ohio|Buys, Co-op users should navigate to [https://supplier-emarketplace.ohio.gov](https://supplier-emarketplace.ohio.gov) and then enter their corresponding login credentials in the Co-op login section of the page. Once logged in, users have a variety of tools available for navigation including quick-access icons and a powerful universal search feature.

2) Submitting Requests to Purchase: State and Co-op users are able to submit digital Requests to Purchase to place sourcing and contracting requests with the DAS Office of Procurement Services.

3) Submitting and Reviewing Exceptions: Exceptions allow the State of Ohio to log and track performance issues and mitigation activities assigned to Suppliers, as well as commend exemplary Supplier performance. Exceptions cover a broader range of Supplier related issues than complaints to vendors (CTVs), allowing for more precise problem tracking and more tactical solution development.
Exceptions: If a Supplier fails to meet their order obligations, or goes above and beyond in doing so, an exception can be created and submitted. An exception typically serves as a formal complaint filed against the Supplier to document and manage an issue. Exceptions can also be used to formally commend Suppliers for exemplary performance. Exceptions can be linked to most items in Ohio|Buys such as a specific Supplier, contract, or order.

While CTVs are specifically used to document the failure to meet a contractual obligation, exceptions can document a wider variety of Supplier performance issues, as well as denote positive actions. Exceptions fall into one of the five types below:

- **Delivery**
  - Example: Failure to deliver by scheduled date

- **Quality**
  - Example: Damaged shipment

- **Financial**
  - Example: Improper invoicing

- **Customer Service**
  - Example: Supplier highly responsive
  - *Positive Example:

- **Revenue Share**
  - Example: Failure to log revenue share on time

In addition to selecting one of the five exception types above, the following information regarding the exception is required:

- Delivery
- Quality
- Financial
- Customer
- Revenue share
In This Document:

Public Notice Solicitations: Ohio|Buys allows Co-op users to create public notice solicitations to notify Bidders and/or Suppliers of solicitation opportunities. As part of this, Ohio|Buys enables:

- A streamlined process for public notice solicitations
- A public solicitation page for all State of Ohio solicitations
- Automatic routing for necessary solicitation reviews

Creating and posting a public notice solicitation in Ohio|Buys can be broken down into five main tasks:

1. **Create the Solicitation:** To start the process, a Co-op Requester will log in to Ohio|Buys and create a new solicitation. As part of creating a new solicitation, the Co-op Requester will enter a Label for solicitation and select a project type of Public Notice.

2. **Set Up the Solicitation Team:** The Co-op Requester can then identify internal contacts to collaborate on the solicitation. Team members can have a variety of profiles with different viewing and editing permissions.

3. **Identify Bidders and/or Suppliers:** Before a solicitation is released, the Co-op Requester responsible for the solicitation can identify any Bidders and/or Suppliers who they would like to invite to respond to a solicitation.

4. **Prepare the Solicitation:** Once Bidders and/or Suppliers have been identified, the Solicitation Team will prepare the solicitation by selecting solicitation dates and uploading the Supplier-facing documents.

5. **Release and Post the Solicitation:** After a solicitation is released, it is routed for any approvals and once the necessary approvals are received, the Co-op Requester can post the public notice solicitation on the Ohio|Buys Public Solicitations page.
ACCESSING & NAVIGATING OHIO|BUYS

Topics

• General Navigation
• Manage Profile Settings
• Manage Email Notifications
Overview:

- **What’s Covered**: This section covers the basics behind using and navigating Ohio|Buys including buttons, field names, search capabilities, and more
- **Roles**: Applies to all users
- **Used When**: Reference this when first getting started in Ohio|Buys
Overview of the Homepage

A
Clicking on the **Ohio|Buys** logo at any time will take you to the homepage.

B
Using the **Navigational Icons** will take you back a page (←), let you view your history (≡), or save the current page as a favorite (☆).

C
The **Main Menu Navigation Bar** includes options available and applicable to you. Click on a main menu option (e.g., Suppliers, Sourcing, Contracts, etc.) to display its associated drop-down menu.

D
The **My Pending Validations** box displays tasks awaiting your review and approval. Clicking the hyperlinks will route you to the associated page to complete the necessary task.
The **My Profile** link displays your account profile and enables you to update your personal information (e.g., name, email address, phone/fax number, default shipping address, Pcards associated with your account).

▲ For security purposes, your Pcard information will not automatically populate in Ohio|Buys and must be manually entered:

- Double-check you have correctly entered your 16 digit Pcard number and 3 digit security code since this information is not validated until a Pcard transaction is submitted (no dashes or spaces between numbers)
- Your Pcard number will be masked and you will be unable to edit it once you have added it to your profile
- If you need to make changes to an existing Pcard, click the Trash Can icon to remove your current Pcard and add a new Pcard with the correct details
- Your Pcard details remain invisible to other users

The **My pending validations** link allows you to view and complete open workflow tasks assigned to you (e.g., Purchase Requisition Approvals).

The **My Scheduled Tasks** link allows you to view and complete open scheduled tasks, such as improvement plan tasks that have been assigned to you. Scheduled tasks will become more frequently used as part of future Ohio|Buys releases.

The **My addresses** link displays your address(es) and enables you to update or add a new address.
The **Globe or Language drop-down Menu** allows you to choose and set your language preference.

The **Logout** option will close Ohio|Buys and bring you back MyOhio. From the MyOhio page, click on your user icon in the top right of the page and select **Logout**. In addition, you will also be logged out Ohio|Buys after 20 minutes of inactivity.
Overview of a Typical Individual Page (1/2)

The **Page Name** is the name of the page you are on and it is displayed in the top left corner of the page.

The wording of **Action Buttons** will vary by user role and the task being completed and are sometimes unavailable to certain users on specific pages. Use these buttons to take action on a particular task:

- **Green Buttons**: Submitting an action.
- **Red Buttons**: Canceling or rejecting an action.
- **Light Blue Buttons**: Saving an action.
- **Dark Blue Buttons**: Performing an optional or additional action.

The **Functional Tabs** are located on the left side of a page. Every major task is organized by functional tabs. Clicking on these enable you to see additional information related to a specific task (e.g. Purchase Requisition or Pcard).
Alerts, if applicable, will not only vary by type, but the specific wording of each alert will vary by page and task. Alerts typically notify you of missing information, expiring documents, or new data required for a particular task. There are two types of alerts:

- **Red Blocking Alerts:** Prevent you from completing a particular task (e.g., submitting a purchase requisition for approval) until action is taken to resolve the alert.
- **Yellow Caution Alerts:** Serve as a warning and are usually a request for additional information or documentation.

**Required Fields** are denoted by a red asterisk at the top right of the field and require you to input applicable information before moving forward.

The **Information Icon** displays a tool tip which can provide helpful information regarding the specific field.
The **Universal Search** option appears in the upper right-hand corner of every page and enables you to enter keywords to initiate a search across all modules in Ohio|Buys.

When using this search, it is recommended to enter at least the last 4 digits of a purchase requisition, purchase order, or contract to quickly find what you are looking for. Users can also search for other objects such as receipts, release and permits, and Suppliers.

The **Browse Search** option appears when you click on **Browse** within a drop-down menu from Main Menu Navigation Bar (e.g. Browse Supplier, Browse Items). Using this option will only search that specific page (e.g., searching in Browse Suppliers will only provide results from the Supplier page).

The **Advanced Search** option appears when you click the More Filters icon (⬇️) on the left side of a Browse page. Using this option enables you to further narrow your search results. The available fields will vary based on the selected tab.
Overview of Search Functions: Quick Tips

Whether the Browse Search or Advanced Search option is used:

- You can customize the way you view your search results on the search results page by right-clicking on a specific column header, selecting the name of the column header, and dragging/dropping it.
- From the results page, you are also given the option to export their search results to an Excel spreadsheet.
- Clicking the **Reset** button clears your search terms and returns you to your original search page (e.g., Browse Items).

For fields that have a **Selector icon (        )**, you must enter text into the field and then select a result from the drop-down BEFORE clicking **Search**. If you type in a word (e.g., Allstate) and it appears in the drop-down and you click **Search** before selecting it from the drop-down menu then your search will not search your keyword.

In addition, you can also click **See All** at the bottom of the drop-down menu to perform a detailed search on a field that has a Selector icon.
MANAGE PROFILE SETTINGS

Overview

- **What’s Covered**: This section discusses how to manage your profile settings and establish defaults in Ohio|Buys
- **Roles**: All Ohio|Buys users
- **Used When**: Setting up an account for the first time in Ohio|Buys
1 Log in to Ohio|Buys. From the Main Menu Navigation bar, click your profile name in the top-right corner of the page and select My Profile from the drop-down menu.

2 Your Profile Management page is displayed. On this page, you can update a variety of preferences and identifying information, including your default purchase requisition information. Scroll to the bottom of the page to find your Default settings.

3 ▲ Updating your default purchase requisition information enables the auto-population of key form fields and accelerates the purchase requisition submission process.

Under Default settings, search and select your preferred inputs to the following fields:

a) Search for and select your Main Organization, which is the Co-op you regularly submit requisitions for.

b) Search for and select the Ship to address, which indicates the shipping address you would like your goods and/or services delivered to.

c) Search for and select the Bill to address, which indicates the billing address you would like the cost of your goods and/or services billed to.

4 Click the Save button at top of the screen to retain your default purchase requisition information for future transactions.
Under Co-op COA, (Chart of Accounts) user can select up to ten favorite COAs. To add favorite COAs, click See All. On the pop-up window, remove any filter and search for your favorite COAs. Select your favorite COAs from the search results.
▲ If you are out of the office for an extended period of time, your profile settings can be adjusted so that all future tasks are delegated to another user. This will allow the other user to take action on the task, while still allowing you to take action on the task.

In the **Delegation** section, complete all of the necessary fields:

a) Select the name of another user in the **Give my approval workflow tasks to** field.

b) Select a date to start delegating tasks in the **From** field.

c) Select a date to stop delegating tasks in the **To** field. If the delegation is supposed to occur indefinitely, then leave this field blank.

Click **Save** at the top of the page.
Overview

• **What’s Covered**: This section discusses how to manage your email notifications in Ohio|Buys
• **Roles**: All Ohio|Buys users
• **Used When**: Setting up an account for the first time in Ohio|Buys
To manage email notifications, navigate to the **Subscription** section of the **User Preferences** tab.

▲ To disable the notifications related to pending approval tasks, deselect the option for *Ohio|Buys: (act_label_subject) Validation Pending for (process_label_subject)*. This option will disable all notifications.

▲ Alternatively, users can set up a special folder to sort all Ohio|Buys emails within their Outlook inbox by following the steps below.

Create a New Folder to store the emails by clicking **New folder** in the left-hand pane and name it “Ohio|Buys.”
Step-by-Step Instructions for Managing Email Notifications

1. Click the Settings (⚙️) icon then click view all Outlook settings.

2. Click Rules.

3. In the Settings menu, click Mail, then Rules.

4. Click Focused Inbox.
   - Choose how you want your email to be organized.
   - Select the option that best suits your needs.
Step-by-Step Instructions for Managing Email Notifications

Click + Add new rule.

Enter the rule information (i.e. name, condition and action) the below. Then click Save.

In this example, we have a added a rule called Ohio|Buys Email that has a condition to move emails whose subject includes in Ohio|Buys in to a folder called Ohio|Buys.
PURCHASING IN OHIO|BUYS

Topics

• Submitting Requests to Purchase
SUBMITTING REQUESTS TO PURCHASE

Overview
- **What's Covered**: This section covers how to access and submit the digital Request to Purchase form in Ohio|Buys
- **Roles**: Applies to all users
- **Used When**: Reference this when submitting a Request to Purchase to place sourcing and contracting requests with the DAS Office of Procurement Services (OPS)
How to Submit a Request to Purchase

Step-by-Step Instructions for Submitting a Request to Purchase

1 ▲ A Request to Purchase should be submitted in Ohio|Buys whenever you would like to place sourcing and contracting requests with the DAS Office of Procurement Services (OPS).

Log in to Ohio|Buys. From the Main Menu Navigation bar, click Procurement and select Create Request to Purchase from the drop-down menu.

▲ Note: you can also access this request form by clicking Request DAS to Source in the Purchase Options section on the Header tab of a purchase requisition.

At a minimum, complete the following fields in the Header and Source Information sections:

a) Label (a summary of what the request is for)
b) Description of Request (a detailed description of what the request is for)
c) Is there an existing DAS contract for similar items/services? (yes or no)
d) Organization (the agency or division requesting the solicitation)
e) Contact Person (who DAS should contact within the agency or division regarding the request)
f) Is this a one time need or ongoing? (one time or ongoing)

▲ In addition, you should also provide any relevant details such as the type of purchase, the date you will need this purchase, any supporting attachments, and the associated Supplier for the purchase (if known).
How to Submit a Request for Solicitation

Step-by-Step Instructions for Submitting a Request for a Solicitation

At a minimum, complete the following fields in the **Funding Information** section:

a) **Funding Source** (Capital, Federal, Grant, GRF, Operating)

b) **Fiscal Year** (2020, 2021, etc.)

Click the **Save** button.

Click the **Send for Approval** button.

▲ Your request will then be routed to DAS for review. You will receive email notifications as actions are taken on your request.

▲ You can see the status of all requests for solicitations within your scope by navigating to the **Browse Request to Purchase** page (from the Main Menu Navigation bar, click **Purchasing** and then select **Browse Request to Purchase** from the drop-down menu).
SUBMITTING & MANAGING EXCEPTIONS

Topics

• Creating an Exception
• Reviewing an Exception
• Closing an Exception
CREATING AN EXCEPTION

Overview

- **What's Covered**: This section covers how to create and submit an exception in Ohio|Buys.
- **Roles**: Co-op Requesters
- **Used When**: A user wants to document feedback on a Supplier, contract, or order as well as note discrepancies with a Supplier.
1. Log in to Ohio|Buys. From any page in Ohio|Buys, go to the main menu navigation bar, click on Suppliers, and then select Exceptions.

2. From the Exceptions page, click Create Exception.

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

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

Step-by-Step Instructions for Creating an Exception

Specify the **Origin** of the exception, which describes who the exception is linked to.

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

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

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

<table>
<thead>
<tr>
<th>Origin</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier</td>
<td>A</td>
</tr>
<tr>
<td>Contract</td>
<td>B</td>
</tr>
<tr>
<td>Sourcing Process</td>
<td></td>
</tr>
<tr>
<td>Order</td>
<td></td>
</tr>
<tr>
<td>Delivery</td>
<td></td>
</tr>
<tr>
<td>Invoice</td>
<td></td>
</tr>
<tr>
<td>Commodities</td>
<td></td>
</tr>
<tr>
<td>Organizations</td>
<td></td>
</tr>
</tbody>
</table>

5 Click **Save**.

6 Review that the information contained in your exception is accurate.

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

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

Overview

• **What’s Covered**: This section covers how to review an exception in Ohio|Buys.
• **Roles**: Co-op Requesters
• **Used When**: A user wants to document feedback on a Supplier, contract, or order as well as note discrepancies with a Supplier.
Log in to Ohio|Buys. You will see any exceptions that require your review in the My Pending Validations section of your homepage. Click on the title of the exception under the Object column to open the exception.

You can also find a specific exception from any page in the Ohio|Buys solution by going to the main menu navigation bar, clicking on Suppliers, and selecting Exceptions.

Review the exception’s Details and Origin. When reviewing, you can make edits or updates as required.

a) If the information provided does not warrant the creation of an exception, click Reject to reject the exception. This will send the exception back to the user who initially submitted it.

b) If the information provided does warrant the creation of an exception, complete the Route To section under Details using the dropdown menu. You can choose to route the exception to:

1) **Contract Analyst**: Routes the exception to the associated DAS Contract Analyst for further action and resolution.

2) **Supplier (handle internally)**: Does not route the exception to the associated Contract Analyst. Indicates that you will reach out to the Supplier directly to resolve the issue.

c) After determining the routing path of the exception, click Submit to approve.

1) If you have chosen to resolve the issue internally, after clicking Submit you should click Open Exception.

2) Click Notify via Email to create an email with a direct link to send to the Supplier
c) Complete the **Send an e-mail** form by adding the following information:

1) **Supplier Contact(s)** - to whom the email will be sent.

2) **Subject** - The subject line for your email to the Supplier

3) **Attachments** - You can attach any supporting documentation that you believe it is important for the Supplier to see with the exception.

4) **Message** - The details of the message that the Supplier will receive. Make sure to include your contact information so that the Supplier can easily reach out to discuss the details of the exception, as well as inform you when mitigating actions have been taken.

5) **Send me a copy** - check this box if you would like a copy of the email sent to the email address associated with your Ohio|Buys account.
CLOSING AN EXCEPTION

Overview

• **What’s Covered:** This section covers how to close an exception in Ohio|Buys.
• **Roles:** Co-op Requesters
• **Used When:** A user wants to resolve an exception created in Ohio|Buys
Log in to Ohio|Buys. You will see any exceptions that require your review in the **My Pending Validations** section of your homepage. Click on the Title of the exception under the **Object** hyperlink to open the exception.

You can also find a specific exception from any page in Ohio|Buys by going to the main menu navigation bar, clicking on **Suppliers**, and selecting **Exceptions**.

Navigate to the bottom of the page and review the **Supplier Proposed Resolution**. The Supplier’s comments on how to resolve the issue in the exception will appear here. The Supplier may have also chosen to upload attachments to support their proposed resolution.

After reviewing the information, if the Supplier’s proposed resolution is satisfactory, you should close the exception. If the proposed resolution is not satisfactory, you should reach out to the Supplier directly to resolve the issue.
Navigate to the **Outcome** section of the exception and complete the following fields:

1) **EndDate**: The date that the exception was closed.

2) **Resolution Type**: Select the applicable resolution type from the dropdown menu.

3) **Outcome**: Describe in detail how the issue highlighted in the exception was resolved.

If the exception can be closed, click **Close**.
CREATING PUBLIC NOTICE SOLICITATIONS

Topics

• Creating a Public Notice Solicitation
• Reviewing and Approving a Public Notice Solicitation
• Posting a Public Notice Solicitation
CREATING A PUBLIC NOTICE SOLICITATION

Overview

• **What’s Covered:** This section covers how to create and release a Public Notice Solicitation in Ohio|Buys
• **Roles:** Co-op Requesters
• **Used When:** A user wants to post a sourcing opportunity on Ohio|Buys
1 Log in to Ohio|Buys. From the Main Menu Navigation bar, click **Sourcing** and then select **Create Sourcing Project** from the drop-down menu.

The Create Sourcing Project page is displayed. On this page, you will need to complete the **Sourcing General Information** section. Note that any fields with a red asterisk are mandatory and must be completed to continue.

a) Update the **Label** field with the name for the sourcing project. This field is visible to Suppliers and must contain a brief, straightforward description of the purpose of the solicitation. If creating the solicitation from a purchase requisition, this field will default to the purchase requisition label and should be updated so that the needs of the solicitation are easily understandable for potential Bidders and/or Suppliers.

b) Select a **Project Type** of **Public Notice**.

c) Indicate the **Status**. This field should always be left as **In Progress**.

d) Select the **Contracting Entity**. This field is typically the agency or Co-op responsible for initiating the solicitation.

e) Add any additional **Participating Organizations** if applicable. These are the organizations that are allowed to access and purchase items from the solicitation.

f) Add the relevant **Commodities** and **Other Commodities** to the solicitation. The selections made here will drive which potential Bidders and/or Suppliers are shown on the Add Suppliers tab. Note that other Suppliers can still be invited to participate even if their profile does not list the commodities associated with the solicitation.

g) Indicate the **Project Start Date**. This will default to the date the project is created, but can be retroactively or future dated if required.

h) Use the **Market Type** field to indicate the type of Suppliers that will be involved in the solicitation.
Create a Public Notice Solicitation

Step-by-Step Instructions for Creating a Public Notice Solicitation

e) If there is a Request to Purchase associated with the solicitation, you can search for it and select it from the drop-down menu.

f) Input the Index Number if there is one associated with the solicitation. An index number is a short contract designator, often represented by three letters followed by three numbers.

Click Save.

Navigate to the Setup Teams tab.
The **Team** page is displayed. To add a team member, click in the **Select Team Members** field and type in the user’s name, then select it when it appears from the drop-down menu.

Select a team member’s role under the **Profile** header. Available roles include:

- **Ad-hoc Approver (Sourcing Project)**: Acts as an additional approver before the Posting Approver when posting a solicitation.
- **Contributor (Sourcing Project)**: Can update the solicitation with additional information.
- **Evaluator (Sourcing Project)**: Can evaluate Supplier responses to a solicitation. Note this is not used for public notice solicitations.
- **Posting Approver**: Reviews and approves the solicitation prior to posting. ▲ If assigning a Posting Approver, the **Posting Approval Required** field on the **Prepare Solicitation** tab must be set to **Yes**.
- **Records Review**: Reviews solicitation documents prior to them being publicly posted, to ensure the proper files are posted (e.g., redacted documents). Note this is not used for public notice solicitations.
- **SME (Sourcing Project)**: Can review and update certain aspects of the solicitation based on their subject matter expertise.

▲ Note: Users can be assigned multiple roles.

▲ To remove a role, click the **X** icon to its left.

▲ To remove a user from the team, click the **Trashcan** (🗑️) icon to the left of the user’s email address.

Repeat steps 5 and 6 to add the remaining team members to the solicitation as needed. When you are done, click **Save**.

Navigate to the **Add Suppliers** tab.
Step-by-Step Instructions for Creating a Public Notice Solicitation

9 If applicable, indicate the Parent Contract for the solicitation. This will automatically add all Suppliers associated with the Contract to the list of invited Suppliers.

▲ This is most commonly used when a contract has already been awarded to a pool of pre-qualified Suppliers and secondary solicitations amongst those Suppliers are required before a purchase can be made.

Inviting Suppliers gives the Supplier the ability to see the solicitation and respond when they log into the application. Suppliers not invited will have to locate the solicitation on the public portal first and click the ‘Participate in RFx’ button to gain access to it. Going forward, Ohio|Buys will automatically notify all Bidders and/or Suppliers who have a commodity on their profile that is in the same category as the commodity or commodities listed on the solicitation.

▲ Note that while commodity Suppliers are notified, only selected Suppliers are specifically invited to participate in the solicitation.

Click the Selector ( ▼ ) icon on the Select Suppliers field. By default this drop-down will display all of the Bidders and Suppliers who have set their account up with the relevant commodity code(s) in Ohio|Buys. To add additional Bidders and/or Suppliers, click See All.

After clicking See All, a list of potential Bidders and/or Suppliers is displayed. By default this list will be filtered to only show Bidders and/or Suppliers who offer the commodity for your solicitation. Users can refine this search using different filters such as Keywords, Commodities, Dealers, etc.

▲ By default Ohio|Buys will filter the Bidders / Suppliers by the commodity code associated with the line item. To see additional Bidders and/or Suppliers, or Bidders / Suppliers who have not set their accounts up with that commodity code in Ohio|Buys, you will need to clear the commodity filter. To do this, click the X icon next to the commodity name in either the Commodities field, or the filter. Then click Search.

▲ Please note, Ohio|Buys requires the selection of at least 1 Bidder or Supplier. If the user would not like to select any individual Bidders and/or Suppliers, search for the Supplier ID associated with the contracting entity (e.g., DAS01) in the Keywords field and select this Supplier in the search results. In order to do this, the chosen Supplier record must have a contact associated with it. Doing so will fulfill the requirement to invite at least 1 Supplier.
Step-by-Step Instructions for Creating a Public Notice Solicitation

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Click the **Checkbox** ( □ ) icon to select a particular Bidder or Supplier or click the **Checkbox** ( □ ) icon next to the **Code** header to select all of the displayed Bidders and/or Suppliers.

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To modify the list of added Bidders and/or Suppliers:

a) Use the **Trashcan** ( -trashcan- ) icon to remove a Bidder or Supplier from the list of invited Bidders and/or Suppliers.

b) Update the **Main Contact** field with the name of the Bidder or Supplier contact that should receive the invitation to respond – note that the Bidder or Supplier must have a contact in Ohio|Buys to be invited to participate in the solicitation.

c) Use the **Invited** checkbox to determine whether or not a Bidder or Supplier on the list should be invited to respond to the solicitation.

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Click **Save**.

If the MBE Set Aside slider is clicked, the solicitation will be flagged as MBE set aside on the Public Solicitations page. Users will only be able to invite MBE Suppliers to respond to the solicitation. Additionally, only registered MBE Suppliers will be able to respond to the Solicitation.
Navigate to the **Setup Documents** tab.

In the **General Documents** section, certain State Documents that are standard across solicitations are displayed. To export these documents to a .zip file, click the **Checkbox (□)** icon to the left of the documents you would like to export. Then click **Zip Selected Documents**.

In the **Sourcing Documents** section, upload documents specific to this solicitation. To upload a document, click **Create document for this project**.

Select a document type from the list provided.

**Document types include:**

1) **Confidential Documents** – Documents associated with the solicitation that bear some level of confidentiality
2) **Evaluation Documents** – Documents relevant to how proposals will be evaluated
3) **Internal Project Documents** – A catchall for all other relevant internal documents associated with the solicitation
4) **Pre-Solicitation Assessment Documents** – Documents relevant to the need. This might include a project intake form, risk assessment, data assessment, etc.
5) **Public Proposals** – Responses to the solicitation that are publicly available – note that these will not be available until after responses have been received
6) **Public Solicitation Documents** – Relevant solicitation documents that are released to the public
Step-by-Step Instructions for Submitting a Hosted Catalog Pcard Purchase

17 Update the document information by including:

a) **Title**: The name of the document.
b) **Summary**: A description of the document contents.
c) **Status**: Whether the document has been approved, drafted, blocked, or requires approval.

18 Click **Click or Drag to add files** to upload a document.

19 Select a document from your PC and click **Open** to upload it.

20 Click **Save & Close** to upload the document.

21 To manage a document once it has been uploaded:

a) Click the **Pencil** (✏️) icon to edit the document information.
b) Click the **Trashcan** (🗑️) icon to delete the document.
c) Click the **Checkbox** (☐) icon to select a document, then click **Zip Selected Documents** to export them to a .zip file.
Repeat steps 15-21 as needed until you are finished uploading solicitation documents. When you are finished, click Save & Close.

Navigate to the Prepare Solicitation tab.

On the Prepare Solicitation tab:

a) Select Public Notice from the RFx Type drop-down menu.

b) If needed, update the Solicitation Name. At a bare minimum, this field should include a description of the solicitation that will be understandable to Bidders and/or Suppliers unfamiliar with the State. Please avoid using acronyms.

c) Indicate whether or not the solicitation is an Amendment.

d) Indicate the Open and Closure dates. These are the dates the solicitation will be available for Suppliers to respond to.
On the **Prepare Solicitation** tab:

- **Status**: Draft
- **RFx Type**: Invitation To Bid (ITB)
- **Amendment**: Yes
- **Enable for Public Posting**: Yes
- **Open and Closure**:
  - **Begin Date**: 10/14/2020, 12:00:00 AM
  - **Closing Date**: 10/21/2020, 12:00:00 AM

**Commodity Suppliers**:
- **Suppliers Notified**: Yes
- **Advanced Options**:
  - Suppliers must sign a Non-Disclosure Agreement
  - Public Invitations
  - Sealed bids
  - Require suppliers to respond to RFx Invitation
  - RFx must have at least one line with an item
  - Check the presence of a total column grid
  - Suppliers assessed in a form, not in a grid
  - Suppliers can partially bid

**Enable for Public Posting**:
- **Publication Begin Date**: 10/14/2020, 12:00:00 AM
- **Publication End Date**: 10/21/2020, 12:00:00 AM

**Open Inquiry Period**:
- **Open Inquiry Begin Date**: 12:00:00 AM
- **Open Inquiry End Date**: 12:00:00 AM

**Process**:

**Summary**:

---

**Step-by-Step Instructions for Creating a Public Notice Solicitation**

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- **e)** Indicate the **Enable for Public Posting** dates – these are the dates during which the solicitation will be available for viewing on the public portal. Public posting dates should match the Open and Closure Dates and will auto-populate to match the Open and Closure Dates when they are initially filled out.

  ▲ If subsequent changes are made to the Open and Closure Dates, the Public Posting Dates will need to be manually updated to match.

- **g)** Complete the **Process** section to provide a general overview of the selection process that will be used to award the solicitation. It is important to complete this field with as much detail as possible to keep Suppliers effectively informed about the selection process. (e.g., for a Public Notice solicitation, provide instructions on where responses should be submitted since they will be submitted outside of Ohio|Buys; for a bid/quote, explain that an award will be made to the lowest responsive and responsible Bidder and/or Supplier)

- **h)** Complete the **Summary** section to introduce and provide a general overview of the purpose for the request. It is important to complete this field with a straightforward explanation of what goods/services the solicitation is for, to provide Bidders and/or Suppliers with a high-level understanding of what is being sought.

---

**Click Save.**
Navigate to the **Documents** header within the **Prepare Solicitation** tab.

In the **Documents** section of the **Prepare Solicitation** tab, users can upload additional documents, or attach existing documents from the **Setup Documents** tab.

▲ Note that any document added in the **Prepare Solicitation** tab, regardless of type, will be visible to the public once the solicitation is posted.

▲ The process for adding a new document is the same as on the **Setup Documents** tab.

To attach an existing document, click **Attach Existing Document** and indicate the document or documents to be added by clicking the associated **Checkbox (√)** icon.

When you have selected all of the documents to be added, click **Save & Close**.

Review the details of the solicitation you have created. When you are ready, click **Submit**.

If no approvers are assigned, move on to step 29. Otherwise, you will need to wait for any approvers to complete their review prior to continuing.
Create a Public Notice Solicitation

Step-by-Step Instructions for Creating a Public Notice Solicitation

On the **Prepare Solicitation** tab, click **Send**.

Select any relevant **Files to attach** and add any additional **Supplier Contacts** for each of the invited Suppliers.

Click **Send & Close**.

Click **OK** in both pop-ups that appear.

Click **Solicitation Posted**.

Click **OK**.

The solicitation has now been posted and is available for responses.
REVIEWING AND APPROVING A PUBLIC NOTICE SOLICITATION

Overview

- **What's Covered**: The process for reviewing and approving a solicitation for HCM Supervisors, Ad-hoc Approvers, and Posting Approvers in Ohio|Buys
- **Roles**: Any
- **Used When**: A solicitation requires review and approval before posting

⚠ Note: Any role in Ohio|Buys may serve as a solicitation approver if they are set up for that role in the solicitation project team, or if they serve as an HCM supervisor to a user creating a solicitation
Step-by-Step Instructions for Submitting a Hosted Catalog

1. Log in to Ohio|Buys. The My Pending Validations window on the Ohio|Buys homepage shows the most recent tasks that are awaiting your review. If desired, you can click on the Object hyperlink for any tasks that have an Activity of HCM Supervisor Approval, Ad-hoc Approval, or Posting Approval, to quickly view and take action on any solicitation needing your approval. Once you have found the task you would like to open, click on the Object name.

2. The workflow for the solicitation is displayed. Completed steps are green, while in progress steps are in orange. To access and review the solicitation in detail, click the Link (🔗) icon next to the Solicitation Name.
Step-by-Step Instructions for Reviewing and Approving a Solicitation

3

The sourcing project is displayed, open to the Setup Project tab. HCM Supervisors, Ad-hoc Approvers, and Posting Approvers all have the capability to review and update most components of the sourcing project.

▲ Note: the Project Type field is locked and cannot be adjusted. If this field needs to be updated, please reject the solicitation.

Review the details of the Setup Project tab and make any necessary updates. If you make any updates, click Save.

4

Navigate to the Setup Team tab. Review the team and ensure that the correct roles have been assigned to the appropriate users. If there are users who should be included on the team but have been omitted, reject the solicitation back to the Sourcing Responsible user with instructions on how to update the team.

▲ If you would like an additional approver to review the solicitation at the same step in the workflow that you are currently completing, you will need to Forward them the solicitation from the Prepare Solicitation tab. Note that users must be on the project team to be forwarded a solicitation.
Step-by-Step Instructions for Reviewing and Approving a Solicitation

▲ If you determine, based on the details of the solicitation, that an additional approver is required at your step in the workflow, navigate to the Prepare Solicitation tab and select the Forward button. All approver roles can forward a solicitation.

▲ Note that forwarding a solicitation allows either you (i.e., the person who was originally assigned this solicitation) or the person you forward it to can approve it, and that once either person approves it the solicitation will move on. Note, however, that the forwarded solicitation will be removed from the forwarding user’s My Pending Validations.

▲ If the intent is to make someone else aware of the solicitation, but not to formally approve it in the system, the non-approver will need to provide any feedback comments outside of Ohio|Buys.

▲ Select the user that you would like to forward the approval to from the dropdown menu. Then click Forward.

▲ Only users with who are listed on the Setup Team tab with the same role can be forwarded a solicitation.
Step-by-Step Instructions for Reviewing and Approving a Solicitation

Navigate to the **Setup Documents** tab.

Review the various documents that have been added to the solicitation. Ensure that all of the documents you would expect to see based on your expertise are included in the solicitation.

Note that some documents contained on the Setup Documents tab will be posted publicly and others will not. The following document types will be posted publicly if they are contained in the Setup Documents tab:

- Public Proposals
- Public Evaluation Documents
- Public Solicitation Documents

▲ Note that **all** documents contained on the Prepare Solicitation tab will be posted publicly.

If there are documents that should be included but have been omitted, or documents have been miscategorized, reject the solicitation back to the Sourcing Responsible user with instructions on which documents to upload.
Navigate to the **Add Suppliers** tab.

Review the list of Suppliers to ensure it is accurate and complete. Note that there may be Suppliers not listed who will be notified, including all Suppliers who are set up to provide this commodity in Ohio\(\text{buys}\).

▲ If Suppliers Notified has been set to Yes on the Prepare Solicitation tab, all Suppliers who are registered to provide the relevant commodity or commodities will be notified of the solicitation. (Note: this will be automatically checked to yes and cannot be edited at round 1)

▲ If the MBE Set Aside slider is engaged only MBE eligible Bidders and/or Suppliers will be invited to participate in the solicitation.

▲ In the case of a two-phase solicitation, be sure that the solicitation is tied to the correct Parent Contract and that the appropriate Suppliers have been pulled down.

If there are Suppliers that should be specifically notified but have been omitted, or Suppliers that have been included and should not have been, reject the solicitation back to the Sourcing Responsible user with instructions on which Suppliers to add or remove.
Navigate to the **Prepare Solicitation** tab. Within the Prepare Solicitation tab, there are a number of section headers containing different information to be reviewed.

⚠ Note that depending on the project type, not all of the headers pictured below will be visible on a given solicitation.

Be sure to review the following headers within the Prepare Solicitation tab:

a) **Setup** – Review the following sections of the Setup tab:

1) **RFx Settings** – Ensure that the Public Notice RFx Type has been selected, the solicitation has been appropriately named, and that the Amendment Status is correctly set to Yes or No.

2) **Open and Closure Dates**
Step-by-Step Instructions for Reviewing and Approving a Solicitation

a) Setup (cont.)

3) Inquiry Period Dates

4) Enable for Public Posting Dates – In general, Public Posting Dates should match your solicitation’s Open and Closure dates. Please confirm your agency’s specific policies with your Agency Admin.

5) Commodity Suppliers – If set to Yes, all Suppliers who can provide the relevant commodity or commodities will be notified.
Step-by-Step Instructions for Reviewing and Approving a Solicitation

a) Setup (cont.)

6) Process – Confirm that a sufficiently detailed description of the State’s selection process has been provided. This will be visible publicly to interested Bidders and/or Suppliers.

7) Summary – Confirm that a sufficiently detailed Summary of the need has been provided. This should provide interested Bidders and/or Suppliers with a high-level overview of the sourcing need they will be applying to fulfill.

b) Documents – Note that all documents posted on the Prepare Solicitation tab will be available publicly to any interested Bidders and/or Suppliers.

▲ The Documents posted on the Prepare Solicitation tab should be reviewed with heightened scrutiny as compared to those on the Documents tab, especially given that they will be disseminated to prospective Bidders and/or Suppliers.
After you have made any necessary updates to the solicitation, navigate to the Prepare Solicitation tab and click the Approve button to approve it and advance the solicitation in the workflow.

If the solicitation requires additional edits from the user responsible for the sourcing project, click Reject.

▲ If you reject a solicitation, you will be asked to type the reason for the rejection in a pop-up comment box. This will be sent along with the solicitation back to the user responsible for the solicitation.
POSTING A PUBLIC NOTICE SOLICITATION

Overview

- **What’s Covered**: The process for posting a public notice solicitation in Ohio|Buys
- **Roles**: Co-op Requesters
- **Used When**: A solicitation is ready to be posted and sent to invited Bidders and/or Suppliers
Log in to Ohio|Buys. From the Main Menu Navigation bar, click Sourcing and then select Sourcing Projects from the drop-down menu.

The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click Search. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

You can also search for projects based on a variety of filters including Commodity, Workflow Status, Contact, Supplier, Contracting Entity, Participating Organizations, Index, RFx Type, Solicitation Status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters (     ) icon.

Open the sourcing project you would like to edit by clicking the Pencil (    ) icon.

Navigate to the Prepare Solicitation tab.
5 Click Send.

Select any relevant **Files to attach** and add any additional **Supplier Contacts** for each of the invited Suppliers.

6 Click Send & Close.

Click OK in both pop-ups that appear.

7 Click Solicitation Posted.

Click OK.

The solicitation has now been posted and is available for responses.
APPENDIX
## 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>12/2/20</td>
<td>Initial draft</td>
<td>All</td>
</tr>
</tbody>
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