This newsletter is intended to be the primary resource for updates regarding Ohio|Buys. We encourage you to read and share it with other active Ohio|Buys users in your agency.

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Agency Updates

PLANNED OUTAGE THIS WEEKEND

Ohio|Buys will have a planned maintenance outage beginning 6AM EST on Saturday, March 27th through 7PM EST Sunday, March 28th to coincide with the OAKS System Maintenance outage.

LOOKING AHEAD TO FISCAL YEAR CLOSE FAQ

Q: How soon can we enter purchase orders (POs) for the new fiscal year? Does it have to wait until 7/1?

A: Yes, users can create requisitions and send them through all approvals to PO with FY22 budget dates. POs will sit in OAKS in budget error until the new budget opens, at which point they will be dispatched.

Q: Is there any reason to create purchase orders in Ohio Buys to pay ISTVs where there’s no “shopping”? (like DAS bills)?

A: Creating POs to pay ISTVs is up to individual agencies, however doing so can be an effective way to manage budgets (i.e., it allows the agency to encumber funds and set them aside for a dedicated purpose). If agencies are creating POs for these types of purchases today in OAKS, they will be doing that in the future in Ohio|Buys moving forward. Even in those scenarios where there is no “shopping” to do and/or no catalog items, free-form requisitions can still be created listing the agency providing the goods/services as the supplier. If agencies are direct vouchering without a PO today, Ohio|Buys will have no impact on that.

Q: Is there any reason to create purchase orders in Ohio Buys where there is no shopping opportunity (like an office space lease like we had with Schottenstein)?

A: Yes, similar to the question above, even in those scenarios where there is no “shopping” to do and/or no catalog items, free-form requisitions and can still be created listing applicable supplier that is providing the goods/services. Creating purchase orders allows the agency to encumber funds and set them aside for a dedicated purpose. More importantly, in scenarios where the agency is doing non-ISTV purchases, POs are required for purchases greater than $2,500 and are critical pieces of information that suppliers must reference on their invoices when billing for the goods/services provided to the State. If agencies are direct vouchering without a PO today, Ohio|Buys will have no impact on that.

Q: Can a requisition/PO be set up at the beginning of the fiscal year and sit in Ohio Buys unused indefinitely in the fiscal year until it’s needed to complete a purchase?

A: Yes, although keep in mind that standard purchase orders and children orders cut off of a blanket purchase order are automatically sent to the supplier contact listed on the order and visible to the order suppliers contacts in Ohio|Buys. Agencies should closely coordinate with
suppliers (e.g., using the supplier comments field on the requisition/purchase order) to communicate with the supplier if there are special instructions about when to fulfill the order.

MULTIPLE ITEM REVIEW

Remember that when you put multiple items on a requisition, if any item has to undergo additional reviews (e.g., Requisite Program Approval, IT Release & Permit, Central Approvals, etc.) the entire requisition goes for review (i.e., both items that need review and items that do not). If the non-reviewed items are needed more quickly, consider breaking up the requisition into multiple requisitions.
Supplier Updates

UNDERSTANDING SUPPLIER ROLES

If you are speaking with a supplier, please remind them that just because they have the admin role assigned to their profile, that does not give them full access to all functionality in Ohio|Buys. They should either assign all roles (Admin, Order Contact, Contract Contact and Revenue Share (if applicable)) to themselves OR add additional contacts with those specific roles based on each roles functionality to access all functions.

Remember: Supplier contacts are managed at the location (i.e., address) level, not the Supplier level. This means that a contact needs to be associated with each location in order to access information and perform actions for that location.

REQUISITE COMMODITY CODES

Requisite programs may see items for review that they do not actually provide IF the commodity code used on the item is the same as one that is listed on that requisite program’s requisite commodities list in Ohio|Buys.

PRICE LISTS POSTED

DAS is working to post price lists and/or catalogs to any current contract posted missing these items. This work continues with an additional 50 price lists posted this week. Please see your OCM practitioner for details.

Training Tips

OFFICE HOURS NOW AVAILABLE

The Ohio|Buys project team has arranged for Office Hours to be available daily for several weeks to assist users with shopping, requisitions, quick quotes, solicitations, contracts, and building solicitation or contract templates. You will receive direct help on a specific transaction as you are working through it!

Starting on Thursday, March 25th, to sign up for these 1-hour office hour sessions:

1 – Determine which item you need to shop for, which requisition you are working on, your active quick quote, solicitation, or contract, or template you would like help with and have that ready to share at the appointment.

2 – There are two links – if the date and time you are looking for are booked at one link, try the other link: Office Hours 1 | Office Hours 2
Register for a time slot: either 1pm, 2pm, or 3pm daily. There are 2 appointments available for every hour time slot. Appointments are first come first serve by registration only at the Ohio|Buys information website.

**In the box titled “Please share anything that will help prepare for our meeting” include the topic of your office hour session (e.g.: solicitation, quick quote, etc.).**

3 – Receive an Outlook/Teams confirmation appointment. Invite anyone from your team you would like to have involved in this session.

4 – **At your appointment:** Be logged into Ohio|Buys so you can proceed with your activity. Trainers will advise you on how to complete your transaction, but they will not be driving.

**NOTE:** Office Hours are not a substitute for opening a helpdesk ticket when there is a technical issue. Trainers can direct you to the help desk if your questions warrant opening a ticket.

These links and instructions are also available on the [Ohio|Buys website](https://ohiobuys.ohio.gov/).
INQUIRY DATES

To allow Suppliers to submit questions using the Inquiry process in Ohio|Buys, you must input Inquiry Begin and End dates on the Prepare Solicitation tab of your solicitation. If these fields are not populated, Bidders and/or Suppliers will not have the option to compose an inquiry in Ohio|Buys. As part of a recent enhancement, these fields are now mandatory for the following types of solicitations: ITB, RFP, RFQ, and IFPs; however, these fields are optional for Quick Quotes.

SUPPLIER INVITATIONS

When creating a solicitation in Ohio|Buys, the system requires that at least one supplier be added prior to the solicitation being posted/opened for suppliers to respond to. In the event that an agency does not want to invite 'real' suppliers, agencies can choose to invite their agency’s OAKS supplier record (e.g., DPS01) to meet this system requirement. Keep in mind that in order to invite a supplier to a solicitation in Ohio|Buys, the supplier record must have a supplier contact listed in Ohio|Buys. If you would like to use your agency’s supplier record in the manner described above but the supplier record does not have a contact, please submit a help desk ticket.

Key Term(s)

MILESTONE TERMS

Milestone terms can be added to a PR if certain goods and/or services are required on a non-recurring basis with a specified schedule. For example, milestone terms can be added to a PR if your agency has a deliverable-based project on a specified schedule.

Updated Key Terms are now available at the Ohio|Buys website in the Terminology Guide. This includes updated terms from the enhancement effort as well as Solicitation and Contract functions.

For More Information

In addition, please refer to:
New Hints and FAQs
Ohio|Buys Fact Sheet
Key Terms
Ohio|Buys Live Catalogs
Support

For log in or system issues please contact OBM Shared Services Center 614-338-4781 or 1-877-644-6771 OR ohiosharedservices@Ohio.gov  Remember to put “OhioBuys” in the subject line!

In order to ensure that we can make this process as easy and efficient as possible, please send non-system/support questions to: ohiobuys@das.ohio.gov

To provide feedback that would benefit the program or to share success stories please visit the Ohio|Buys Feedback survey.

Thank you for your partnership and willingness to help build a solution that will not only benefit your agencies, but Ohio as a whole.