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

Reminder - COVID-19

As we continue to be working remotely as a result of COVID-19 social distancing initiatives, we wanted to ensure we stay connected during this time. The Ohio|Buys Team is committed to providing services to your teams via teleconferencing and other available tools.

The team is aware many Agency users are getting acclimated to working from home, and we will be flexible with your time and methods of communication by providing telecommunications assistance/options, as needed, when meeting with our group (e.g., using screen sharing tools like Skype, MS Teams, Free Conference Call, etc).

The attached document describes the services the Ohio|Buys team has scheduled and will offer your agency. Additionally, you will find a corresponding resources list attached.

Note: Your OCM Practitioner will remain available to you during normal work hours throughout the day/week, albeit remotely. Please continue to keep in close contact should you need additional services from the Ohio|Buys Team. We're here to help!

Budgetary Restrictions

Due to the recent order from Governor Mike DeWine, we have been receiving questions from end users related to how their in-flight requisitions will be impacted.
1. If any order is not encumbered to a Purchase Order in OAKS with a “Valid” budget status, it has been impacted.

2. Agency fiscal officers will need to work with their OBM budget analysts to provide justification for the release of any part of their allotments currently on hold.

3. Any new attempted transactions using affected expense account codes will not pass budget check unless the agency has received a release from OBM. This also applies to any in-flight transaction that has not yet created a purchase order and/or passed budget check.

4. Even if encumbrances have passed the budget check, agencies should review them to see if any can be reduced or cancelled.
Helpful Hints

Guidance Using 'Do Not Encumber'

An encumbrance is the underlying accounting term for the purchase order. When 'Do Not Encumber' is selected on a requisition, it means that the order will not be sent to OAKS.

Please review the situations below regarding when to use 'Do Not Encumber':

1. **Payment card transactions**

   You do not need to set up an encumbrance for a payment card transaction. When the card is swiped by the vendor, the transactions go to US Bank, then load into OAKS. Then agencies reconcile those statements and make payment to reimburse the bank. Setting up the encumbrance can complicate the situation and is not necessary.

2. **Non-OAKS Funding Sources**

   For purchases using funding sources that aren't tracked through OAKS (e.g., Certificates of Participation (COPS)), the ‘Do Not Encumber’ slider should be used since this is what will prevent the order from being sent to OAKS.

Quick Quotes

We are continuing to receive questions about the quick quoting process and below are some helpful hints to guide you through the process:

The Solicitation Name field on the Quick Quote is automatically populated from the Label field on the initial Purchase Request. Please see the screen shots below:
However, users are able to update the field on the Sourcing Project screen after clicking **Create Quick Quote** and are also able to update it on the Prepare RFx tab shown below. Users are encouraged to pay close attention to what is listed in this field since it is a key piece of information shown on the Ohio|Buys public portal. Suppliers often use this field to identify opportunities of interest to them; if the Solicitation Name doesn’t clearly summarize the solicitation and what is being sought, suppliers may not look at the Quick Quote or respond. The Requisition Label is an internal facing field, while the example below and the Solicitation Name is external facing and is what suppliers will see. Any update to the Requisition Label will be populated into the Solicitation Name to make it easier for a supplier to navigate the process.
Additionally, the Summary and Process sections of the Quick Quote are found on the Prepare RFx tab towards the bottom. In addition to using the Solicitation Name field, these fields are also intended for users to input relevant details and instructions about their solicitation.

- The Process field should be used to explain things like what the award will be based on (e.g., lowest responsive and responsible, best value, etc.) or other procedures that apply to the solicitation.
- The Summary field should be used to explain any relevant information about what is being sought that couldn’t be explained in the Solicitation Name.

After completing the section users must make sure to click Save to capture the information so it is visible to Suppliers. Users are strongly encouraged to fill these fields out to give suppliers a better understanding of the solicitation.
Supplier View – Proper Solicitation

In order for a supplier to understand the pertinent details about a solicitation, the Solicitation Name, Process, and Summary field need to be completed and will populate the highlighted boxes below.

Supplier View – Improper Solicitation

If you fail to properly fill out the Solicitation Name and Summary field properly, the image below shows an example of what a supplier will see (note how difficult it is to determine what the solicitation is for).
Locate a Punchout Catalog
In order to locate a punchout catalog, follow these simple steps:

- Click on Shop
- Click on the Browse Items tab
- Click on Advance Filters
- Selection the Punchout only filter
- Delete all item tags
- Search

Below is a list of current Punchout suppliers:

- GBEX LLC
- McKesson Corp.
- Lehigh Outfitters, LLC
- Deere & Company
- MSC Industrial Supply
- Fastenal Company
- WW Grainger, Inc.
- Loeb Electric Company
- Fisher Scientific Company
- CDW Government LLC
- Sophisticated Systems, Inc.
- InfoVision21, Inc.
- Brown Enterprise Solutions, LLC
- Dell Marketing, LP
- HP, Inc.
- Insight Public Sector, Inc.

When attempting to locate contract price list information, users can:

- Go to the Contracts Page
- Click on Browse Contracts
- Look up Contract
- Click on the Price List tab to see all of the items available for the particular contract.

**Locating Contract Price List Information**
In Case You Missed It

We have added a new Job Aid that provides a step-by-step explanation on how to review integration errors in a purchase order.

Please remember that we are frequently updating Agency and Supplier Job Aids. Please take some time to review this material so you and your teams can utilize the most current information to make Ohio|Buys work for you. We will continue to keep you informed as Job Aids are added and updated. Please bookmark or favorite the Ohio|Buys training page for easy access to new updates.

Key Term of the Week

*Encumbrance* - Spending document that legally reserves appropriation from an agency's available appropriation balance which represents purchase orders and contracts entered by state agencies and institutions of higher education. This document may either be a State of Ohio Purchase Order or State of Ohio Contract Encumbrance.

Helpful Links

Below you will find links to valuable information and training for Ohio|Buys:

- FAQs
- Ohio|Buys Fact Sheet
- Key Terms
- Job Aids
- Ohio|Buys Live Catalogs

Support

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.