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.

### Table of Contents

- **NEW Success Stories / Spotlight**: Department of Aging
- **Agency Updates**: FY Deadlines | OneSpan Sign | Access to Confidential Documents | Updating Roles in Ohio|Buys
- **Supplier Updates**: Supplier Webinars are Back | Update to OSS Email Address
- **Training Tips**: Saving in Ohio|Buys | Updated Links for Enhancements | Reminder: Unit Price Field | Office Hours Available
- **Key Term(s)**: Product Sheet

### Success Stories / Spotlight

**DEPARTMENT OF AGING**

The job aids are fabulous! They are very easy to follow and actually during training I had to step away, but I picked up the job aid when I returned and was quickly able to get reoriented.
Agency Updates

FISCAL YEAR DEADLINES

The last day to enter a requisition or change orders into OAKS or Ohio|Buys is **Monday, June 21, 2021**. For a requisition to source to a PO, the requisition must be approved, including approval by OBM for personal services, by **Monday, June 21, 2021**. Any requisitions that do not meet these requirements will NOT become a PO and will need to be re-entered as a FY22 requisition.

Change orders that have not been approved, sourced, and budget checked by the end of the business day on the 21st, will result in the corresponding requisition/PO not having a valid status and will need to be re-entered as an FY21 requisition.

DAS strongly recommends that requisitions and change orders be entered well in advance of June 21st to allow adequate time for internal and central approvals, sourcing, and budget check. This extra time allows for the approval process, as well as the correction of any possible sourcing and/or budget errors. POs created in this fiscal year that do not pass a valid budget check will be canceled/closed.

Questions regarding **FYE Requisition Deadline** can be directed to OBM Shared Services by sending an email to OBM.SharedServices@OBM.Ohio.Gov or calling 614-338-4781.

ONESPAN SIGN

To get OneSpan Sign accounts set up for Ohio|Buys to electronically sign contracts, please open a ticket with OBM Shared Services and the project team will coordinate creating the account. The OneSpan Sign account for Ohio|Buys does not go through individual agencies or their IT groups. Remember, if an agency already has a OneSpan Sign account for their own use, they will still need to open a helpdesk ticket to have one set up to integrate with Ohio|Buys.

UPDATING USER ROLES

Users are directly opening tickets to have their roles updated in Ohio|Buys. Instead of submitting helpdesk tickets, agencies should follow these steps:

1. Users recognize the need to update their Ohio|Buys account (e.g., profile changes are needed, organizational scope needs modified) and work with their supervisor to complete the **User Account Request form**

2. Users or their supervisors notify their Agency Admin of the necessary changes to their account by submitting the completed User Access Request form

3. The Agency Admin makes the change in Ohio|Buys based on the **User Account process**.
• REMEMBER: Ohio|Buys is flexible. If your business process doesn’t fit all of the functionality of the system, seek ways to working within your business process and still use the system where possible.

Supplier Updates

SUPPLIER WEBINARS ARE BACK!

Supplier Webinars are available for May. Suppliers can get more information from the Supplier Training tab on the Ohio|Buys website. Please encourage your suppliers to attend a webinar.

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UPDATE TO OSS EMAIL ADDRESS

OBM has updated their email address to open helpdesk tickets. Please remind your suppliers that they need to contact: OBM.SharedServices@OBM.Ohio.Gov

The Ohio|Buys website, Supplier Log In page, and all training materials are in the process of being updated.
Training Tips

SAVING IN OHIO|BUYS

Saving early and often in Ohio|Buys is critical, especially with large or complex transactions like solicitations and contracts. The State’s security policy requires information systems to initiate a session lock after 30 minutes of inactivity. In Ohio|Buys, saving is one of the main ways to stay ‘active’ in the system and avoid these types of time out issues while in the middle of a transaction.

- **When shopping in a punch out catalog:** Ohio|Buys sees activity in a punch out catalog as inactivity in Ohio|Buys so a time out may occur. While using a punchout, users can add some of the items they intend to purchase to their cart and punch back into Ohio|Buys, then return to the punchout catalog to complete their shopping. Upon punching back in the second time, all items will be combined into one purchase requisition provided the user does not time out in Ohio|Buys. If a timeout occurs, users can resume adding items to their original shopping cart by switching to the in-progress shopping cart from the Browse Items page.

- **When creating requisitions, solicitations and contracts:** the work in these activities can be extensive, but frequently hitting save will ensure no information is lost due to a time out.

An enhancement is being created to determine if Ohio|Buys can notify users of pending time outs.

**UPDATED LINKS FOR ENHANCEMENTS**

Please note the following links did not point to the new job aids. These links are correct.
RTP Future Fiscal Year Should Result in R&P for Future Fiscal Year
When a Release & Permit (R&P) is automatically assigned as part of the Request to Purchase (RTP) workflow, the R&P that is generated will now have an end date that is equal to the last day of the fiscal year referenced on the RTP. For example, if the RTP lists a fiscal year of 2023, the resulting R&P will have an end date of 6/30/2023.

The Review a Request to Purchase Job Aid has been updated to reflect this change.

RTP Additional Agency Approver
When a Request to Purchase (RTP) is being created, agency users are now able to send the RTP to an additional approver within their agency before it is submitted into the rest of the approval workflow. This will function similarly to the Additional Approver step/functionality that is available for purchase requisitions.

The Submit a Request to Purchase and Review a Request to Purchase Job Aids have been updated to reflect these changes.

REMINDER: UNIT PRICE FIELD
When creating solicitations in Ohio|Buys, agencies should carefully review the item grid(s) in their solicitation to ensure the Unit Price column is required. Requiring this field will force suppliers to fill it out with their pricing information when responding to the solicitation; in other words, if the agency wants the supplier to submit their pricing for a solicitation in the item grid, the agency must set the Unit Price field to mandatory.

The benefit of this approach is that it makes it easier for agencies to compare different suppliers’ proposal prices. This also allows agencies to flip the awarded solicitation back to the requisition (i.e., to convert an awarded solicitation back over to the requisition and be able to update the line item, the Supplier must enter pricing information in the item grid). If the field is not mandatory, suppliers may attach documents to their proposal with pricing information. The agency will then have to review those documents individually to compare proposals. The requisition line item(s) will have to be manually updated as opposed to being flipped from the solicitation item grid.

An enhancement is being created to make the Unit Price field mandatory by default, and agencies can choose not to make this mandatory if they prefer an uploaded attachment with pricing from their suppliers.

OFFICE HOURS AVAILABLE
Office Hours are now available to assist users with Ohio|Buys functionality. You will receive direct help on a specific transaction as you are working through it!
Office hours are available for your training-related questions (i.e., how to do something in Ohio|Buys). If your question(s) is regarding policy or system issues (e.g., why a purchase order is In Progress) then users should submit a helpdesk ticket. In addition, anything that substantially involves R&Ps, OAKS, or OneSpan Sign will need to go to the helpdesk as well.

*Remember, if it's a question of "how" then office hours are the way to go. If it's a question of "why" it needs a helpdesk ticket.*

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://www ohiobuys ohio.gov).

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**For More Information**

In addition, please refer to:
- [New Hints and FAQs](https://www ohiobuys ohio.gov)
- [Ohio|Buys Fact Sheet](https://www ohiobuys ohio.gov)
- [Key Terms](https://www ohiobuys ohio.gov)
- [Ohio|Buys Live Catalogs](https://www ohiobuys ohio.gov)

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**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](mailto: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.