

Ohio

Buys

Connecting Buye

May 21, 2020 Newsletter

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.

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What We Are Working On

We are headed in to sprint #3 and wanted to remind everyone of what is coming. These enhancements will be deployed to Ohio|Buys on Friday 5/29/2020.

ENHANCEMENTS

Pcard Requisition Type and Light Checkout Page

- A new type of requisition (Pcard Requisition) will be created to simplify the Pcard purchase process. This will eliminate confusion with Pcard orders going through the full requisition workflow due to the Pcard slider not being selected early enough in the current workflow.
- Due to confusion about when a purchase requisition (PR) can/cannot be submitted from the light checkout page, the light checkout page will be removed to provide a consistent experience for users submitting PRs.

PR Workflow Status Indicators

- Additional statuses are being added for PRs so users can more easily identify where a PR is in the workflow approval process (e.g., Draft, Requisitioner Approval, Agency Procurement Approver, Fiscal Approval, Final Approval, etc.).
 - **Supplier ID put on the PO**
 - The Ohio|Buys Purchase Order (PO) template is being revised to include the associated Supplier ID.

Print PO Buttons

- The PO template is being revised to include the status of the PO (e.g., Status: In Progress). This will help avoid issues with a supplier beginning to fulfill a PO prior to it being dispatched because an Ohio|Buys user manually sent the PO to the supplier. Training for suppliers will be updated to instruct users and suppliers to review this field on the PO and to not fulfill the PO until a fully approved PO is received (Status = "Ordered").

Update PO Template with Original PO Number

- The Ohio|Buys Purchase Order (PO) template for change orders is being revised to show the original PO number above the amended PO change order number to minimize confusion and to make clearer what PO number suppliers must use when invoicing.

Print name of Pcard user on PO

- The Ohio|Buys Purchase Order (PO) template is being revised to include the name of the Pcard holder for the order.

Notifications on Requestor Supervisor Step

- A notification will be sent to the applicable Agency Admins when a PR is submitted, routed to the Requester Supervisor step, and no supervisor for the Requester is found. Upon receiving this notification, an Agency Admin can review and take action on the PR as needed. Note that Requester Supervisors already receive a notification at this step and Agency Admins can already act upon these requisitions when no supervisor is found, this enhancement will just ensure Agency Admins are notified when this situation occurs.

Update Notifications

- All existing email notifications in Ohio|Buys have been updated so that they are more user friendly.

Catalog Upload - Change Step Admin on Last Step

- The Catalog Upload workflow will be updated so in the event there is no associated Contract Analyst assigned at the Contract Analyst step of workflow, a State Admin will be able to delegate the approval to the proper Contract Analyst. This will eliminate Agency Admins receiving notifications and pending validations when this occurs.

Update Tool Tip and Field Name on Supplier Registration Page

- The Business Phone field on the supplier registration form is being renamed to Work Phone Number so it matches the corresponding field name in the OH|ID security registration system. In addition, the Corporate Email field tooltip is being updated for clarity.

Add Tooltip on Supplier Location Field

- A tooltip is being added on the Supplier Location field to explain that this denotes how the Supplier would like to be paid.
- Filtering Search Results By More Than One Status At a Time (Browse Req and PO Screens)
- Users will now have the ability to select multiple statuses when searching on the Browse Requisitions and Browse Orders pages. This will allow users to more easily filter and sort search results by status.

Remind Your Suppliers

We are continuing to see a significant increase of supplier participation from in our webinars. Thank you to everyone who has connected us with suppliers and would ask for your continued advocacy in our outreach effort.

As a reminder, the webinars cover:

- Accessing and Navigating Ohio|Buys
 - Responding to Solicitations
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- Reviewing and Acknowledging Purchase Orders

Webinar Information

Supplier/bidder training webinars will be held on the dates listed below. Each 1-hour webinar will provide a review of the topics above, as well as time for questions. Suppliers are welcome, but it is not necessary, to attend more than one session as the topics reviewed will be the same in all sessions.

Date	Start Time	Webinar Link
Friday, May 22	10:00 AM	Join Ohio Buys Webinar #33
	2:00 PM	Join Ohio Buys Webinar #34
Friday, May 29	10:00 AM	Join Ohio Buys Webinar #35
	2:00 PM	Join Ohio Buys Webinar #36

NOTE: Prior to attending, please verify your device is able to join the webinar by clicking on this link: <https://www.webex.com/test-meeting.html>

Key Term

Training Tips

When should I create a change request (CR)?

A CR is created to make changes to an issued purchase order, such as:

- Update the quantity of an item or items
- Modify chartfield information
- Remove no longer needed items from an order
- Change the Ship To address or addresses (note: this only applies if the order has not yet shipped)

What sort of changes cannot be addressed via a CR?

You should not attempt to use a CR to update an order if you need to modify the Requisition Type, Supplier, Budget Date, or Unit of Measure. If any of these values need to be changed, please cancel or close the current purchase order and submit a new purchase requisition with the requested changes. In addition,

you are unable to add additional line items as part of a CR and a CR cannot be created for a purchase order if the purchase order has a status of Closed or Canceled.

Currently, there are two major system-wide limitations to creating CRs: Are there any additional issues I should be aware of regarding CRs?

- A CR should not be used to make updates to a Pcard purchase. If the purchase was made on a Pcard and you need to make changes, please reach out to the Supplier directly.
- If you need to apply a CR across a large number of line items, please update the line items in batches of three at a time or close/cancel the current PO and submit a new purchase requisition with the requested changes. Updating more than three lines at once can cause issues when communicating back to OAKS. Emphasizing the importance of selecting a Supplier Contact and understanding that if a Supplier Contact is not selected, the user is responsible for manually emailing the PO to the Supplier outside of Ohio|Buys.

 - Info: A supplier contact has not been selected on this line item. If there is not an available contact, please share this order with

Describe the item

	ID <input type="text" value="47147"/>	
Name <input type="text" value="Chemical Dispenser"/>	Item Code <input type="text" value="039397"/>	
Ordered Quantity <input type="text" value="5.00"/> <input type="text" value="Each"/>		
Commodity* <input type="text" value="47131711 - Cleaner dispenser"/>	Profile ID <input type="text"/>	

Purchasing from an OPI

When you are looking to make a purchase with the Requisite Procurement Program, here is a link on how to purchase from [OPI](#)

Helpful Hints

Purchase Orders

Users are now able to create and submit purchase requisitions for FY21 by adjusting the Budget Date field in the header of the purchase requisition. This will allow those purchase

requisitions to complete the requisition approval workflow and be turned into purchase orders that are sent over to OAKS. The associated purchase order will remain in budget error in OAKS and in Ohio|Buys until the budget for the new fiscal year is available.

The process for splitting a purchase order amount out by fiscal quarters has not changed. Ohio|Buys is restricted to what OAKS can process due to its integration, so users will still need to create and submit a separate purchase requisition for each fiscal quarter.

In Case You Missed It

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.

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](#).



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