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

FISCAL YEAR END CLOSE REPORTS

As agencies prepare for Fiscal Year End Close, it is important for users to clean up requisition, change order, and purchase order transactions from FY21 in Ohio|Buys which are incomplete or otherwise in error. Completing this task is crucial to prevent old transactions from falling into budget error in the new FY.

There are 3 reports in Ohio|Buys that allow you to find and identify incomplete transactions for clean-up. From the Analytics > Browse Queries page, you can:

- Use the keyword “month” to find all three queries.
- The queries will only bring back data from the agencies/organizations within your user scope.
- Click the Extract icon for the query you would like to run.
• Review each transaction and determine whether it will be complete in time for fiscal year-end close or not. If not, you may want to cancel or delete the transaction. If you have any trouble during the clean-up process, please reach out to us via OBM.SharedServices@OBM.Ohio.Gov as soon as possible for assistance.

The available clean-up queries are:

• **Requisitions still pending approval** – this will include anything that is not in “Ordered” status. (For ODOT users, this will bring back anything that is not in “ODOT Completed” status.)
  - We recommend that you filter this query by “Budget FY” (column H) to only show transactions in the current fiscal year and any blanks. This will prevent you from accidentally deleting work that is intended for future fiscal years.

• **Change order in progress** – this will also include anything that is not in “Ordered” status

• **POs not Dispatched** – this will include any PO that is currently “In Progress” and has not completed processing to an order.

**SYSTEMS SUNSET SCHEDULE**

As the project completes Phase 1.5 training for all remaining cabinet agencies, boards, commissions and select co-ops on the following systems, these systems will be sunset at the end of the fiscal year. Additional information will be released closer to these target dates.

All functionality is now in Ohio|Buys with corresponding Job Aids to support these functions. Please send any questions regarding this plan to: ohiobuys@das.ohio.gov
SUBMITTING REQUESTS TO PURCHASE

Ohio|Buys allows State and Co-op users to submit a Request to Purchase (RTP) to place sourcing and contracting requests with the DAS Office of Procurement Services (OPS).

State agencies using Ohio|Buys to create purchase requisitions (PRs) must submit a RTP for purchases of products, supplies, and/or services that:

a. Are potentially valued at $50,000; and
b. Do not reference a contract established by OPS.

State agencies not using Ohio|Buys to create PRs must or submit a RTP to DAS for purchases of products, supplies, and/or services potentially valued at $25,000 or more.

State agencies are not required to submit a RTP and should move directly submitting a PR if:

a. The purchase is being made from a Requisite Procurement Program
b. The purchase is being made from an existing state contract (except for services being requested under the Third-Party Administrator (TPA) for Facility Maintenance and Repair Projects contract (#CSP905120-1) and competitive selection two phase prequal contracts, in which case a RTP is required)
c. The purchase is covered by an existing non-IT Blanket R&P; or,
d. The purchase is exempt from DAS authority in the Ohio Revised Code

AGENCY RTP TRAINING AVAILABLE

Through several enhancements, the RTP process in Ohio|Buys has changed. This includes the addition of an option to route an RTP to an Agency Approver step before submitting it to requisite procurement programs and/or DAS. The Submit a Request to Purchase job aid has been updated and a Review a Request to Purchase job aid is also available.

<table>
<thead>
<tr>
<th>Agency Systems</th>
<th>Approach Summary</th>
<th>Target Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request to Purchase</td>
<td>Shut down the Request to Purchase to DAS application.</td>
<td>June 30, 2021</td>
</tr>
<tr>
<td>Complaint to Vendor (CTV) &amp; Vendor Performance Survey</td>
<td>Remove the links to the Vendor Performance Survey and the CTV application from the Procurement website and revise content to direct users to Ohio</td>
<td>Buys; shut down the CTV application.</td>
</tr>
<tr>
<td>Posting Contracts on Procurement Website</td>
<td>Remove permissions for users so they would not be able to post contracts on procurement website</td>
<td>TBD</td>
</tr>
<tr>
<td>DAS Systems</td>
<td>Approach Summary</td>
<td>Target Date</td>
</tr>
<tr>
<td>Procurement Information Management System (PIMS)</td>
<td>Remove analysts’ and suppliers’ ability to add new documents.</td>
<td>June 30, 2021</td>
</tr>
</tbody>
</table>
If you need to add a reviewer in your agency, please contact your Agency Administrator so they can add the “Additional Approver” role.

Webinars to review this enhanced process will be available in June. Register in OhioLearn to attend a webinar.

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**Supplier Updates**

**AMAZON UPDATE**

The team continues working with Amazon on their punchout catalog and shifting user accounts into the punchout. Training materials are getting finalized, and a brief User Acceptance Testing (UAT) activity is planned for next week. The project is now targeting a June go live with emails going directly to existing users on how to move their account.

**SUPPLIER WEBINARS ARE BACK!**

Supplier Webinars are available for May. Suppliers can get more information from the [Supplier Training tab](http://ohiobuys.com) on the Ohio|Buys website. Please encourage your suppliers to attend a webinar.

<table>
<thead>
<tr>
<th>Date &amp; Time</th>
<th>Topic</th>
<th>Webinar Meeting Invitation Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friday, May 21</td>
<td>Access and Navigation</td>
<td>Download Invite for Ohio</td>
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<tr>
<td>10:00AM-11:00AM</td>
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<tr>
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<tr>
<td>2:00PM-3:00PM</td>
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<tr>
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</table>
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

SOLICITATION-TO-CONTRACT DOCUMENT TRANSFER

When a contract is created from a solicitation, a Contract Analyst can select which solicitation documents are carried over to a contract; however, if you would like to include Supplier-uploaded documents that were part of a response to a questionnaire, these documents must be downloaded from Ohio|Buys and manually uploaded to the associated contract.

To easily download these documents, navigate to the Analyze & Award tab of the solicitation, click the Checkbox icon(s) for the Supplier proposals you would like to download, and then click Download selected proposals. Doing this will download all Supplier upload proposal documents to your computer, which can then be uploaded to a contract as needed.

The Creating and Managing Contracts Learner Guide has been updated.

FAVORITE SEARCHES
Favorite searches are a convenient way to find in-progress items. For example, a favorite search on the Browse Requisitions page can show in-progress PRs at an agency (i.e., any non-Draft or non-Ordered PRs):

Users can set up their desired search terms on any Browse page in Ohio|Buys and then click the Star icon to label and save the corresponding saved search.

From this saved search, a user can then right-click on any of the column headers in the search results to export the data to Excel and then review it offline for further analysis.

**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.

Key Term(s)

CHARACTERISTIC GROUPS

Characteristic Groups - Allows for the grouping of features, which are the associated specifications related to a specific product or commodity. E.g., a computer can have a characteristic group of ‘screen size’ and features of ‘12 inches and ‘14 inches. A characteristic group’s purpose is to provide additional product information to help the user select the desired item.
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 OBM.SharedServices@OBM.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.

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