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

The last day to process any purchase requisitions or change orders for FY21 in OAKS or Ohio|Buys is **Monday, June 21, 2021 at 5:00 PM**. Any purchase requisitions or change orders that are not fully approved and processed by this time will not become a purchase order and will need to be re-entered as a FY22 purchase requisition.

Ohio|Buys will be unavailable to submit and process purchase requisitions and change orders from Tuesday, June 22 through the new Fiscal Year; however, the solicitation and contract functionality will be available. During this time, Suppliers will still be able access Ohio|Buys as usual.

Reminder: users will continue to see “integration errors” in their pending validations for FY22 POs (once per PO) until we reach FY22.

Please keep the following in mind:
1. Users will need to resolve all pending items with purchase requisitions and purchase orders with budget dates in FY21 on or before June 21st (including integration errors, budget errors, incomplete change orders, and incomplete purchase requisitions).

2. All FY21 Ohio|Buys purchase requisitions and change orders must be in “Ordered” status (or in the case of ODOT, in “ODOT Complete” status) on or before June 21st. All FY21 POs must also be in “Ordered” status on or before June 21st. Please note, any transactions for FY21 that do not meet this requirement will be cancelled or deleted beginning June 22nd, and the user must re-create the transaction in the new fiscal year when the Ohio|Buys and OAKS re-open.

3. If there are issues, users should sign up for office hours or report them to the help desk immediately so, they can be addressed.

4. Users will have “view only” access in both systems for purchase requisitions and purchase orders (OAKS/Ohio|Buys) beginning June 22nd once roles are shut off. Users will regain edit rights when Ohio|Buys and OAKS re-open.

There are three queries 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 available queries are:

1. **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.

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

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

Click the Extract icon for the query you would like to run. The queries will only display data from the agencies/organizations within your user scope.
After running these queries, 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. To assist you with reviewing your in-progress purchase requisitions and change orders, there are two job aids that are available:

1. **Review Purchase Requisition Status and Approval History**: walks through how to find in progress purchase requisitions on the Browse Requisitions page and explains what each of the purchase requisition statuses indicates. In addition, this job aid explains how to run the *Requisitions still pending approval* and the *Change order in progress* queries in Ohio|Buys.

2. **Review Purchase Order Integration Errors**: walks through how to find in progress purchase orders that have encountered an integration error and explains the actions that need to be taken to resolve the displayed error. In addition, this job aid explains how to run the *POs not Dispatched* query.

If you have any trouble during the clean-up process, please consider signing up for office hours using one of the below links or email OBM.sharedservice@obm.ohio.gov for assistance.

Office Hours 1 | Office Hours 2

**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.

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.
D&R AVAILABLE IN OHIO|BUYS

As of July 1, all Determination & Recommendation (D&R) activity will occur in Ohio|Buys. For early adopter agencies, please make sure any user completing a D&R utilizes the Complete a Performance Valuation Questionnaire job aid along with other training materials available at the Ohio|Buys website.

This will also be introduced to the remaining cabinet agencies to begin utilizing in Fiscal Year 2022.

Supplier Updates

CATALOGS/PRICE LISTS POSTED

The team has successfully completed User Acceptance Testing (UAT) and is now working toward the planned soft launch with two Early Adopter Agencies, now targeted for early July. Once the soft launch is complete, all Early Adopter Agencies with Amazon users will receive emails (directly to existing users) on how to punch out, log in and merge their existing Amazon account into their Ohio|Buys account. More information to come!

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 additional User Acceptance Testing (UAT) activity is planned for next week. The project will soft-launch prior to releasing emails directly to existing users on how to move their account.

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<th>Agency Systems</th>
<th>Approach Summary</th>
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<tr>
<td>Request to Purchase</td>
<td>Shut down the Request to Purchase to DAS application.</td>
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<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>
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<td>DAS Systems</td>
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<td>Procurement Information Management System (PIMS)</td>
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Training Tips

PURCHASING IT COMMODITIES IN OHIO|BUYS

Items purchased through Ohio|Buys are automatically routed to relevant approvers according to the commodity code selected. Users should be aware of this feature when setting their commodity codes, especially for freeform items.

Items that have IT commodity codes will be automatically routed along the Ohio|Buys IT approval workflow after the Fiscal Approver step. Once IT review is complete, the purchase requisition will be automatically assigned an IT Release & Permit. No additional action is required by the agency to apply the R&P.

Commodity codes that require IT review commonly begin with 4321XXXX, however these are not the only IT commodity codes in Ohio|Buys. Some common items that will require IT review include, but are not limited to:

- Desktop Displays
- Laptop Docks
- Computer Hardware and Software

To look up specific commodity codes when creating an item in Ohio|Buys, users can leverage the UNSPSC commodity code list which can be found at https://www.unspsc.org/search-code.

OFFICE HOURS AVAILABLE

Office Hours will continue throughout Fiscal Year 2022. Trainers are 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)

JUSTIFICATION ATTACHMENT

Attachments on a PR meant to justify to approvers why the contents of a PR have been selected and what they are needed for (e.g., permission from a supervisor, images). These are required when creating an emergency requisition, flagging a requisition as a single-source or sole-source procurement, or listing a Supplier Quote ID for a quote obtained from outside of Ohio|Buys and may also be required depending on your agency’s internal business processes. These attachments are not visible to Suppliers.

For More Information

In addition, please refer to:

- New Hints and FAQs
- Ohio|Buys Fact Sheet
- Key Terms

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!

If you have questions about the project itself, please email: ohiobuys@das.ohio.gov

Published by the State of Ohio Office of Procurement Services