

Ohio

Buys

Connecting Buyers and Suppliers

June 19, 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

The Ohio|Buys team has been working hard and on Tuesday, we released the fourth sprint of Release 2 enhancements. Included in the list below, we have ten new enhancements to improve the experience with Ohio|Buys.

ENHANCEMENTS

One-time address changes cannot stay visible in Bill To and Ship To address fields

- In order to reduce confusion with previously used one-time addresses showing up as an option for future Bill To and Ship To Addresses on requisitions, an enhancement was made to add “ADHOC” to the beginning of the label for ad-hoc addresses so they are easy to identify.

If a user would like to have a new address permanently added to OAKS, they need to submit the OAKS Location Entry Form which is located at:

https://archives.obm.ohio.gov/Files/Agency_Resources/Forms/State_Accounting/OAKS_Location_Form.pdf

Forward Button on PR

- When a Requisitioner is creating a purchase requisition, they will always have access to an Additional Approver drop-down from which they can select users to sign off on the PR prior to it advancing in the approval workflow. As with Pcard purchases, only one of these Additional Approvers needs to approve the PR for it to advance.

Materials updated include: Requisition Learner Guide, 02.07 Order Items from a Dealer, 02.14 Submit an After-the-Fact Purchase Requisition

Update "Unit" Field Label

- When a Supplier is reviewing and responding to a quick quote solicitation, the Currency column will no longer be displayed as all solicitations and requests must have a currency of USD.

No quick quoting on a change order

- Users will no longer be able to create a quick quote as part of change order and any non-blocking alerts instructing a user to obtain multiple quotes as part of
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change order will no longer be displayed. This change is being made because a user cannot update and should not update the Supplier as part of a change order.

Add Quick Quote Alerts to check for CB Number

- If a Controlling Board Number is entered for a particular purchase requisition line item, quick quote alerts will no longer be displayed.

Continuation Flag Alert Update

- If the Continuation field for a purchase requisition line item is set to Yes the purchase requisition is a continuation of a previous request, quick quote alerts will not be displayed and users will be able to submit the purchase requisition for approval without completing a quick quote. In addition, the Continuation field will be included on the STS query/report.

Request to add order to browse invoices grid

- The Order ID field is now visible on the Browse Invoices pages in Ohio|Buys.

Ability to Use Multiple Filters at Same Time

- Additional multi-selectors have been added for a variety of search filters on the reporting pages, such as the Department, Order, and Category fields.

Update the “Receiving Required” field, default to “NO”

- The Receiving Required field will default to "No" on all purchase requisitions. Users will still have the ability to update this field to "Yes" as needed and submitting a purchase requisition with this field set to "No" will not prevent subsequent receipts from being created.

Materials Updated Include: The Purchase Requisitions Learner Guide

Supplier unable to view address details on homepage

- Suppliers with multiple locations will now be able to view the details off those locations on their homepage. The position of the tooltip when hovering over a location has been moved to appear below the location in the menu drop down vs. above the location as seen in prior enhancement releases.
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Coming Attractions

As the fourth sprint rolls out, we are preparing for the fifth. The list of coming enhancements is listed below. These will be deployed on Wednesday, July 1, 2020.

ENHANCEMENTS

MBE selector on the line level

- The MBE slider on the line item level of a PR is being changed to a dropdown with the following drop-down menu options: M (MBE), E (Edge), and N (None). This will just add to the functionality that already exists for this field, it will continue to automatically flag the line as an MBE set-aside purchase (M) if the contract being referenced has a Market Type of MBE or if the item is tied to an MBE set-aside sourcing event. The field will now also automatically flag the line as an EDGE purchase (E) if the contract being references has a Market Type of EDGE, and automatically flag the line as None (i.e., no MBE or EDGE) if a contract is not referenced or if the contract referenced doesn't have a Market Type of MBE or EDGE. For situations where the Market Type on the contract is MBE3, the field will default to N but be editable.

Update the "Change Order?" diamond on PO workflow

- Users can create a change order today to correct some types of PO integration errors. When the changes are sent, they usually get a second integration error that the PO is not in OAKS. This enhancement will prevent that second error and send the changed PO to OAKS without State Admin intervention.

Supplier-emarketplace.ohio.gov updates

- The supplier-emarketplace.ohio.gov landing page is be revised to contain a more similar look and feel with other enterprise-wide portals like the Supplier Portal and OH|ID Portal.

Ability to see all Approvals in the Approval History

- The Main Workflow Approvals section is being moved from the requisition header to the Workflow tab on the purchase requisition. It is also being revised to clearly indicate all approvers at each rule who can take action on the requisition and will indicate who actually approved at each step of the workflow rules engine. This means if forwarding was used or if there are multiple
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approvals at particular step of the approval workflow, the names of each approver will be logged and visible in the Approval History.

Remove Ordered Column on Browse Reqs Page

- The Ordered Column on the Browse Requisition page is going to be removed because it is duplicative with the Requisition Amount column. In addition, the Requisition Amount tooltip on the Browse Requisition page will be updated to say, "Total amount of requisition" instead of "Pretax."

Notification for Agency Admin when HCM Supervisor not Found

- The notification to an Agency Admin that is triggered as part of the Purchase Requisition workflow when a requester's supervisor cannot be found is being revised for clarity.

End of Fiscal Year Reminder

Requisition and Purchase Order Processing

The last day to enter a requisition or change orders into OAKS is Monday, June 22, 2020. For a requisition to source to a Purchase Order, the requisition must be approved, including approval by OBM for personal services, by Monday, June 22, 2020. Any requisitions that do not meet these requirements will NOT become a Purchase Order and will need to be re-entered as a FY 2021 requisition.

Change orders that have not been approved, sourced, and budget checked by the end of the business day, will result in the corresponding requisition/Purchase Order not having a valid status and will need to be re-entered as a FY 2021 requisition.

Administrative Services (DAS) strongly recommends that requisitions and change orders be entered well in advance of June 22nd 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. Purchase Orders created in this fiscal year that do not pass a valid budget check will be canceled/closed. If you have any questions, please contact either Ken Ball at (614) 728-7688 or e-mail kenneth.ball@das.ohio.gov, or Krista Holcombe at (614) 728-4311 or e-mail krista.holcombe@das.ohio.gov.

Contract Management

The Ohio|Buys team would like you to know we are introducing a new section to the newsletter that will highlight project updates and key impacts to key contract management stakeholders as we move toward Release 3. While the OCM team will continue to provide you with real time updates, we will be highlighting items of note regarding the following functionality our weekly/biweekly newsletters going forward:

- Solicitations
- Contract Management
- Technology Solicitations and Contracts

Remind Your Suppliers

SUPPLIER TRAINING

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
- 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, June 19	10:00 AM	Join Ohio Buys Webinar #41
	2:00 PM	Join Ohio Buys Webinar #42
Friday, June 26	10:00 AM	Join Ohio Buys Webinar #43
	2:00 PM	Join Ohio Buys Webinar #44

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

Item Tags - Provide a way to flag items based on State purchasing considerations or importance and provide a quick visual for end users when searching for items and can also be used as a search criteria. (e.g., M1: Mandatory First Requisite Programs, M2: Mandatory Second Requisite Programs, M3: Mandatory DAS Contract, etc.)

Training Tips

The Ohio|Buys Learner Guide includes a version control page will tell users both the overall document version (at top) as well as which pages have been updated as part of the regular revisions in Ohio|Buys (in table).

v2

Version Control

Version	Publish Date	Summary of Updates	Pages Updated
1.0		Initial draft	All
2.0		Updated Pcard process	All
3.0	6/15/2020	Updated Receiving Required and Additional Agency Approvers	27, 33, 42, 50, 60, 74

You can become familiar with the purchase requisition process by viewing the [Working with Purchase Requisitions in Ohio|Buys Learner Guide](#).

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](#).



Department of
Administrative Services

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