



Buy

Connecting Buyers and Suppliers

July 23, 2020 Newsletter

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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PO Budget Check & Dispatch Status

As a reminder, when creating a Purchase Order, the PO is sent to OAKS in real time for budget check. That budget check status will return in approximately two minutes from OAKS.

However, the PO will not be dispatched until the PO dispatch process runs at the following times:

9:30am | 11:30am | 3:30pm | 5:00pm

This is a crucial step to ensure that the PO is within threshold tolerances before the PO is dispatched. Once dispatched, OAKS will send a Dispatched status for the PO back to Ohio|Buys.

Upon Ohio|Buys receiving the dispatch status, a workflow job that runs every 30 minutes will push the PO to the next step in the workflow. Users will see their POs pushed to the next step in the workflow by approximately:

10:00am | 12:00pm | 4:00pm | 5:30pm

What We Are Working On

ENHANCEMENTS

The next round of enhancements will be going live July 24th and will feature:

New Alert: Cannot Reference CB and DAS Contract on PR Line

- As part of this enhancement, there is a new alert for purchase requisitions that will prevent users from referencing both a Controlling Board Number **and** a Competitive Selection, Waiver of Competitive Selection, or Requisite Program contract. This alert will become blocking at the Requisitioner Approval step if the purchase requisition was created by a Requester; or at the Agency Procurement Approver step if the purchase requisition was created by a Requisitioner.

Update Emergency Purchase type workflow and release and permit type assigned

- The Emergency Purchase Requisition Workflow is being updated so emergency purchase requisitions are routed back to the Agency after approval has been received from the Chief Procurement Officer. Once the agency knows the supplier(s), the requisition can be submitted, and a release and permit obtained. Controlling Board Numbers will still be established in OAKS as they are currently, and the agency will have the ability to add the applicable Controlling Board Number to the requisition.
- The enhancement will leverage the workflow rules engine to obtain agency approvals on the requisition prior to the requisition being submitted for budget validation and creating an order. Prior to using this new feature, Early Adopter Agencies will need to update their workflow rules engines to ensure they have rules for Emergency Requisitions established. To begin the process of updating rules engines, please submit a help desk ticket.

Add Property Damage Selector

- A Property Damage selector field is being added to the purchase requisition screen so the Department of Administrative (DAS) Services' Office of Risk Management (ORM) can capture data on purchases that are being made due to sudden and accidental direct physical damage to property.
 - The DAS Office of Risk Management (ORM) is seeking property insurance data to consider a self-insurance layer to handle claims within the rising property insurance deductible, and to consider a future self-insurance layer of significant size to save costs due to industry-wide rising property insurance costs.
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- The DAS ORM is requesting that all agencies report all sudden and accidental/unexpected property damage to assist with the gathering of this data and for potential recovery through the property insurance policy.

Exclude Pcard orders from OH STS Report query

- The OH STS Report query in Ohio | Buys is being updated to *not* include Pcard orders; previously, users had to filter out Pcard transactions using the Pcard Purchase column.

Send to Field on Workflow Tab

As part of this enhancement, the Exception's Workflow will contain only those Supplier Contacts associated with the Supplier listed on the Purchase Order that the Exception is tied to.

Exception Workflow - Replace Agency Procurement Manager as Performer on Agency Reviewer Step

The Exception workflow is being updated so the Agency Procurement Manager role is no longer configured as the default performer on the Agency Reviewer step. A new profile called Agency Exception Reviewer has been created to review exceptions submitted by users in their agency. Early Adopter Agencies will need to identify which users within their agency should be set up in Ohio|Buys with this profile and work with their Agency Admins to assign this profile to those individuals.

Change Verbiage of; Limit to My Scope; Checkbox

The "Limit to my scope" checkbox on the Solicitations page is being updated to "My Sourcing Projects." Clicking this checkbox allows a user to filter their results by their organizational scope and association with a particular sourcing project.

Add Contract Owner Code Field in Contract Shell and OIT Contract Referenced Step in Requisition Workflow

- A Contract Owner field is being added to the Ohio|Buys contract shell. In addition, an "OIT Contract Referenced?" diamond is being added to the Purchase Requisition workflow. This step is being placed right before the "IT Purchase" step in the workflow and will evaluate whether any of the lines on a PR reference a contract where the Owner Code field is equal to OIT. If the answer is yes, the workflow will transition to the "Pre-Governed Contract Referenced" diamond in the PR workflow and go on to obtain an IT Release and Permit; if no, the workflow will transition to the "IT Purchase" step in the workflow.
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WEBSITE UPDATES

If you have not visited the [Ohio|Buys website](#) recently, we have made updates to the Agency, Supplier and Training sections in order to make it easier to use Ohio|Buys. In addition, all [videos](#) for enhancement sprints 1-6 are available for review.

We have just released a wave of [R2 Enhancement videos](#) that we will continue adding to as enhancements come online.

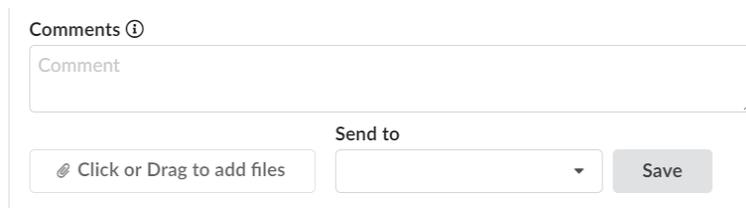
CATALOG UPDATES

Attached to this newsletter you will find an updated list of the available catalogs offered in Ohio|Buys. We will continue to update this quarterly and provide with our regular newsletters.

Training Tips

Using Comment Functionality on the Workflow Tab

State users have the ability to write and send questions and comments via the Workflow tab in Ohio|Buys. It is recommended for Approvers to use this functionality whenever they have a clarifying question for a Requester or Requisitioner rather than immediately rejecting a purchase requisition with comments. With this functionality, an Approver can:



Comments ⓘ

Comment

Send to

Click or Drag to add files

Save

1. Navigate to the Workflow tab of a purchase requisition.
2. Enter their question or comment in the Comments field.
3. Select the Requester or Requisitioner's name from the Send To drop-down menu.
4. Click the Save button.

This will keep the purchase requisition in the Approver's pending validation list and will send an email notification to the Requester or Requisitioner. The Requester or Requisitioner can then add their response in the Comments field in the Workflow tab of the purchase requisition and send it back to the Approver.

REVIEWING A PRICE LIST

Below are the steps for users to search for contracts and leverage a price list while shopping.

1) Log into Ohio|Buys and navigate to **Browse Contracts**

2) Search for contracts using your Supplier's name, OAKS ID, other key terms, or using the additional filters on the left side of the page. Click on the contract name and then navigate to the **Price List** tab.

Edit	Code	Name	Supplier	Contract Type	End Date	Status	Validity	Created on	Index Number	State Contract Number
	CTR002191	Bradley Sample CTR	CINCINNATI ASSOCIATION FOR THE BLIND	State Term Schedule	4/30/2021	Draft		4/20/2020		EX042020
	CTR002190	brandon	NET PAC INTERNATIONAL LLC	Competitive Selection	11/15/2019	Draft		10/8/2019		1728293939
	CTR002189	Bkc ent OST contract	PHEASANT FOREVER INC	Competitive Selection	10/7/2020	Signed		10/8/2019	BKC01OST	Bkc OST Ent Contract
	CTR002188	Rainbows and Unicorns		Competitive Selection	10/30/2019	Draft		10/7/2019		kj76456
	CTR002187	Contract for Training Class by Good Times Only Bar and Pub	BEVERLY GOOD	Agency Administered	10/22/2020	Signed		10/7/2019	DOTC33234	DOTC - PSA Agreement - Non-Camp Selection
	CTR002186	Retest 57692/57699	NET PAC INTERNATIONAL LLC	Competitive Selection	10/4/2021	Draft		10/4/2019		10042019
	CTR002185	RDA	181 ENTERPRISE	Master Agreement	11/30/2019	Draft		10/2/2019		CTR123321
	CTR002184	Fred	1 AMAZING HOME HEALTH CARE LLC	Competitive Selection	10/2/2019	Draft		10/2/2019		12312
	CTR002183	Manutan	Manutan	Master Agreement	5/30/2020	Draft		10/2/2019		

3) Search for the item you wish to purchase in the list. Select the **Add to Cart** button to add the item to a requisition.

Quantity	Commodity	Product Code	Name	Product Reference	Price	Currency	UOM	Validity Start Date	Validity End Date	Tag	Index Number	State Contract Number	EOD Status	Link to Catalog
1	Floor cleaning services	CRP30484-3	Floor Care Services		0.350	USD	Square Feet	7/8/2020	6/30/2022		LOT704	CRP30474		
1	Building cleaning services	CRP30484-1	Janitorial Services		50.000	USD	Days	7/8/2020	6/30/2022		LOT704	CRP30474		
1	Floor cleaning services	CRP30484-2	Floor Care Services		0.160	USD	Square Feet	7/8/2020	6/30/2022		LOT704	CRP30474		

Remind Your Suppliers: Remaining July Supplier Trainings

There are still two Supplier/bidder training webinars remaining in July. Each 1-hour webinar will provide a review of the topics above, as well as time for questions. The Ohio|Buys Team is still seeking Agency Representative participation in these meetings to interact directly with suppliers. Representatives can reiterate the importance of getting registered and setup in the system to participate in/respond to quick quote solicitations. If you'd like to participate, please [contact us](#).

Webinar Schedule and Registration Information

Click the link to register for the webinar based on the date and time you would like to attend. You can register in advance or right up until the webinar begins.

Date	Start Time	Webinar Registration Link
Friday, July 24	2:00 PM	Register for Ohio Buys Webinar #47
Friday, July 31	2:00 PM	Register for Ohio Buys Webinar #48

Note: Before joining, be sure to [check system requirements](#) to avoid any connection issues.

Key Term

Item Tag - Provides a way to flag items based on State purchasing considerations or importance and provides a quick visual for users when searching for items. It 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.)

In Case You Missed It

Please remember that we are frequently updating Agency and Supplier Learner Guides and [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:

[New Hints and 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

Mike DeWine, Governor
Jon Husted, Lt. Governor
Matt Damschroder, Director

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