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

THINK CATALOG FIRST

When beginning a purchase requisition in Ohio|Buys, users should always start from the Browse Items page to shop for the items they are looking for as opposed to creating a free-form requisition.

When using the Browse Items page in Ohio|Buys, we recommend **first trying to search using the Keywords field**. To start, enter a word or short phrase into the Keywords field, such as the name of the item, the Supplier’s name, or the State Contract Number. Ohio|Buys’ predicative search tools will automatically show possible searches as you type, and you are able to select any of these recommendations to complete a search. In addition, you can also enter search terms into the Keywords field and then click the Search button to complete a search.

If too many results or no results are displayed after completing a search, **consider removing any filters** that are associated with your search. By default, the Browse Items page contains default filters for Dealers, External Items, Mandatory DAS Contracts, Mandatory First Requisite Programs, Mandatory Second Requisite Programs, and MBE Set-Aside items. To remove a filter, click the X icon next to the filter.

1. **Advanced Search**: If you are still unable to find what you are looking for or are still seeing too many search results, you also have the ability to add additional search terms to your search. **Click the Advanced Search icon** on the left side of the page to reveal the Browse page’s associated advanced search fields. From here, enter
your additional terms. For example, on the Browse Items page, you can add advanced search terms to search by Supplier and/or State Contract Number. After you have entered your advanced search terms, click back onto the main part of the page and click search.

2. **Punchout Catalog Search**: If you are still unable to find the item you are looking for at this point, you should **consider searching relevant punchout catalogs**. To easily see a list of the available punchout catalogs, remove all of your search terms and filters and then click the Punchout only checkbox icon in the advanced search term options. From here, we recommend opening and searching the punchout catalog for any supplier that you think may offer the item you are looking for. For example, if you are looking for a particular office supply item, search GBEX’s catalog; for equipment and tools, search Grainger; and for computers, search HP’s catalogs.

3. **Non-Catalog (Freeform) Items**: If you are still unable to find the item you are looking for at this point, you are able to **click the Add Non-Catalog Item button**. This button is located in the center page and is used to manually add the item to your shopping cart. You should only add a non-catalog (i.e., freeform) item to your shopping cart if you have exhausted the other search options and are relatively certain that no comparable item is available in Ohio|Buys.

**QUICK QUOTE TIPS**

**Starting a Quick Quote**: Always start a quick quote from a purchase requisition. If you do not start your quick quote from a purchase requisition, you will be UNABLE to add the award details to a purchase requisition to complete your purchase.
**Freeform Items and Contracts**: If you are creating a quick quote for a freeform item and are trying to associate the item with a contract, the contract CANNOT have any items in its price list. As noted above, always review the Browse Items page before starting a free form requisition and the Quick Quote process.

If a contract has a price list and none of the items appear to match what you are trying to purchase, you may:

- Add a free-form item to the requisition and not reference the contract;
- or contact the Contract Analyst to verify the item(s) you are looking for are not on contract and determine whether or not the item(s) can be added to the contract.

**Rounds**: Amendments can be issued by creating a new round. If an amendment (i.e., a new round) is issued, Bidders and Suppliers will be required to acknowledge receipt of the amendment and re-submit a response to remain under solicitation consideration (note that Bidders and Suppliers do have the ability to copy a proposal submitted to a prior round). When creating an amendment, you should always note this in the Summary field as well as the reason for the amendment.

If you would like to cancel a solicitation, the user responsible for the solicitation should create a new round and change the RFx Type to Cancellation. Public-facing notes regarding the cancellation should be captured in the Summary field of the solicitation.

**Deleting a Lot or Round**: If a lot and/or round was created in error, it can be deleted as long it is in Draft status. To delete the lot and/or round, select Delete this RFx from the Other Actions drop-down menu.
SUPPLIERS AND QUICK QUOTES

Adding Additional Commodity Codes to Invite Additional Suppliers: The Additional Commodity Codes field for a solicitation is used for reporting purposes and will not impact which Suppliers are notified when the solicitation is posted. If you would like to find and invite additional Suppliers, navigate to the Add Suppliers tab of your solicitation, and click See All on the Select Suppliers field. From this page, update the solicitation’s 8-digit commodity code on the Commodity field (e.g., 43211501 – Computer servers) to a higher-level commodity code (e.g., 43210000 – Computer Equipment and Accessories) or search for additional commodities to find and add additional Suppliers.

Inviting Suppliers gives the Supplier the ability to see the solicitation and respond when they log into the application. Suppliers not invited will have to locate the solicitation on the public portal first and click the ‘Participate in RFx’ button to gain access to it.

Ohio|Buys will automatically notify all Bidders and/or Suppliers who have a commodity on their profile that is in the same category as the commodity or commodities listed on the solicitation.

Note that while commodity Suppliers are notified, only selected Suppliers are specifically invited to participate in the solicitation.

Bidders/Suppliers Who Are Not in Ohio|Buys

• If you encounter a company that is not in Ohio|Buys, ask the Bidder/Supplier to go to the Ohio|Buys Website and download the How-To Guide to get started.
• If you encounter several companies that are not in Ohio|Buys, contact the Supplier Enablement Team at supplier.ohiobuys@das.ohio.gov to request an email template so you can begin the outreach process to those companies.

Training Tips

QUICK QUOTE TRAINING
Procure-to-Pay (including Quick Quote) training will be available for the last time in 2020 on **Wednesday, December 9th** and **Friday, December 11th**. Users can sign up through OhioLearn. This training will include:

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<thead>
<tr>
<th>Time</th>
<th>Topic</th>
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<tbody>
<tr>
<td>9:00 am</td>
<td>Kickoff</td>
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<tr>
<td>9:30 am</td>
<td>General Navigation</td>
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<tr>
<td>10:00 am</td>
<td>Creating and Submitting Goods and/or Services Requests</td>
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<tr>
<td>12:00 pm</td>
<td>Break</td>
</tr>
<tr>
<td>1:00 pm</td>
<td>Creating and Awarding Quick Quotes</td>
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In addition, Quick Quote training materials are located at the [Ohio|Buys website](http://Ohio|Buys) in the Agency training tab.

6. Solicitations (including Quick Quotes) Learner Guides and Job Aids

6. SOLICITATIONS (INCLUDING QUICK QUOTES) LEARNER GUIDES AND JOB AIDS

To become familiar with all the sourcing capabilities in Ohio|Buys we recommend bookmarking and reviewing the 06.00.LG.1 Creating, Managing and Awarding Solicitations Learner Guide (v1.2). This guide provides detailed steps for creating, managing, updating, approving, and awarding solicitations. Note that this learner guide is focused on the sourcing processes for formalized solicitations that typically result in a contract between the State and a Bidder or Supplier. For more information on quick quotes, please refer to the associated learner guide.

A quick quote (i.e., three bids and a buy) is a standardized, simplified solicitation process that encourages additional competition and replaces the State's existing quoting practices. A quick quote needs to be completed in Ohio|Buys whenever a line item in a purchase requisition references a State Term Schedule (STS) contract or contains over $2,500 in non-catalog items for a Supplier. To become familiar with the Quick Quote process in Ohio|Buys, we recommend bookmarking and reviewing the OhioBuys Quick Quote Learning Guide v2.0. This guide covers the activities related to creating a quick quote in Ohio|Buys, identifying and inviting Bidders and/or Suppliers, reviewing and comparing quotes, making awards, and updating associated purchase requisitions.
Key Term(s)

Updated Key Terms are now available at the OhioBuys website in the Terminology Guide. This includes updated terms from the enhancement effort as well as Solicitation and Contract functions.

For More Information

In addition, please refer to:
New Hints and FAQs
OhioBuys Fact Sheet
Key Terms
OhioBuys Live Catalogs

Support

For log in or system issues please contact OBM Shared Services Center 614-338-4781 or 1-877-644-6771 OR ohiosharedservices@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 OhioBuys 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.