

Frequently Asked Questions (FAQs) - Buyers

December 2019

General

Who will be completing tasks in Ohio|Buys?

Users include: Requesters, Requestor Supervisors, Requisitioners, Agency Procurement / Fiscal and Final Approvers, Central Receivers and Agency Admins, as well as DAS-specific SME Reviewers, Contract and Catalog Analysts, Procurement Managers, EOD Compliance Specialists, State Admins, and Requisite Program Approvers. Suppliers (including Requisite Program Suppliers) will also complete tasks, such as acknowledging orders and flipping POs into invoices.

Can managers access Ohio|Buys to view worklist, history, reports, etc.?

All users can view worklist items as well as the history on items where actions were previously taken. A selection of queries and analysis reports will be available to all Ohio|Buys users. Additional reporting functionality will be made available as part of future releases.

What is going to happen to forms (such as purchase request forms) that are currently in use and are specific to Agencies?

Ohio|Buys is intended to replace the purchase request form process. Requesters can submit goods and/or services requests online in Ohio|Buys.

Will Ohio|Buys store POs? How long? What about Legacy POs?

Ohio|Buys purchase orders will be stored indefinitely. Legacy POs (those created before the go-live of Ohio|Buys) will be housed in OAKS.

Will there be a centralized place for the auditor to audit Pcard and POs/procurement and purchases?

OBM reviews Pcard transactions in OAKS currently. All information regarding PR/POs created in Ohio|Buys is available for audit.

Currently, Asset Management exists in OAKS. Is this changing?

Asset Management will remain in OAKS. The project team is determining which Agencies are utilizing it and which integrations are currently in place. When assets are purchased in Ohio|Buys, notifications can be forwarded to the Asset Management team.

Some agencies currently complete a DAS Pcard log, will my agency still need to do that if they are doing it today?

There is no change to DAS Pcard log requirements in conjunction with Ohio|Buys in 2019.

Does Ohio|Buys have a separate eSignature software they are introducing to replace the current State software?

No, Ohio|Buys does not have a separate eSignature software. The State's current enterprise eSignature software will integrate with Ohio|Buys in 2020.

Shopping in Ohio|Buys

What will change for people in my department who put in a request for an item to be purchased? For example, my group asks the group administrator to purchase the items we need. Do I need to begin using Ohio|Buys myself?

Depending on how your agency conducts procurement, other users can submit requests on your behalf in Ohio|Buys. If your group administrator makes purchases on your behalf today, they can continue to do so in Ohio|Buys.

What types of items are going to be available in the Ohio|Buys in December?

Some examples of the types of goods and services that will be available for purchase in December are batteries, clothing, eSignature transactions, footwear, general hardware, gloves, ink and toner cartridges, IT equipment pickup and disposal/delivery services, laboratory supplies, office supplies, soaps and hand sanitizers, and writing utensils.

Is Travel included in the purchases made using Ohio|Buys?

Travel reservations and purchases are not part of the Ohio|Buys solution through 2019.

Will Ohio|Buys allow me to order multiple items from separate contracts?

Ohio|Buys will allow you to purchase multiple items from multiple Suppliers in a single shopping transaction / purchase requisition. After the requisition is fully approved, the Ohio|Buys solution will automatically send a purchase order to each respective Supplier.

In what order will I see Search results when I shop in Ohio|Buys?

The search result will appear with the following priority:

1. Requisite Programs
2. Mandatory DAS Contracts
3. MBE Set Aside Contracts
4. All other results

Will I be able to sort by EDGE, VBE, etc. when making my purchase?

Options to sort by groups such as VBE, MBE Set Aside, and EDGE will be included in this release. These items can be sorted to the top of your group when shopping by using item tags.

What is a punch-out catalog?

A punch-out catalog is one that exists on an external website (outside of the state's site) that is accessed via Ohio|Buys. All of the purchasing and requisition tracking will take place within Ohio|Buys, however the actual shopping experience for punch-out catalogs will take place in the linked market place (i.e., punching out).

Will the search function in Ohio|Buys include item codes on punch-out catalogs?

Once you access the Supplier's punch-out catalog from Ohio|Buys, the user will be able to search based on the specific search functionality implemented by that Supplier. Searching within Ohio|Buys will not comb item codes from within Suppliers' punch-out catalogs.

Will users get a timeout if they are out in a punch-out catalog and have to walk away?

Punch-out timeouts are managed individually by each Supplier, so depending on what they've set as the timeout time, a user could lose their punch-out cart if they walk away prior to punching back in to Ohio|Buys.

How can I order an item not listed in Ohio|Buys?

You can add a freeform line item to your purchase requisition. You should only use this functionality when there is no acceptable alternative item within Ohio|Buys.

Can I save items that I purchase frequently?

Yes, there is a feature within the Ohio|Buys solution that allows you to save frequent purchases as a kit, making future ordering more efficient. You can also easily duplicate previously submitted PRs to help you save time on submitting a new request.

Will Ohio|Buys allow me to purchase an item that is on a CRP but is still available from an MBE contract? For example, can I still order sticky notes on GBEX's site, even though I am required to order them through the Cincinnati Association for the Blind?

By design, the Ohio|Buys solution will require you to attach a justification document to the requisition before these types of orders can be submitted. Per the Ohio Revised Code, goods and services that are available from Requisite Procurement Programs like CRP must be purchased from those Programs unless a waiver is obtained. Once a justification document is attached, the Ohio|Buys solution will route the requisition to the Requisite Procurement Program to review and either approve or deny a Waiver.

Will my transactions have to be approved before I can purchase?

All non-Pcard requisitions and Pcard requisitions above \$2,500 will be routed for approval within Ohio|Buys prior to a purchase order being generated.

Will the system tell me if my Pcard is over its limit?

The Ohio|Buys system does not track any bank information in regard to Pcards, so there is no alert mechanism for a card that has reached a spending limit.

If an employee goes to a storefront to make a purchase outside of Ohio|Buys, how is this being handled in the future? Such as an emergency purchase?

After the fact (or storefront) purchases is one of the four types of purchase requisitions in Ohio|Buys. When creating a requisition for an after the fact or emergency purchase, select “After the Fact” as the Requisition Type. A requisition type of “After the Fact” is a purchase that was already made outside of Ohio|Buys.

Another requisition type, “Emergency Purchase,” is for purchases that have been made, but is urgent enough to warrant an accelerated approval process. Standard purchase and Blanket/Encumbrance Order are the other two types of Requisitions

Creating & Approving Purchase Requisitions

When a Requester puts in a request, how will Ohio|Buys know if it is an existing contract, a Pcard or a PO? How is the request routed to the right approver?

Currently, contracts, PO and PCards have their own workflow approval stages.

Ohio|Buys searches for existing contracts and contains an automated approval workflow that routes requisitions to the correct approvers. Once a purchase requisition is fully approved a purchase order will be created automatically.

How will approvers be notified that they need to review an item in Ohio|Buys?

Approvers will receive an email notification with a link to the item that requires their attention. They will also be able to access their pending approvals from the My Pending Validations section of their homepage.

For typical Requesters in Ohio|Buys, will their immediate supervisor need to approve the purchase requisition?

Yes, for users are who not set up as Requisitioners, approval from the user’s direct supervisor will be required to place an order in Ohio|Buys unless it is a Pcard purchase under \$2,500.

How will Requesters/Requisitioners know which Organization to select when making a purchase?

Users will only see the Organization(s) to which they belong or purchase on behalf of.

What is the default delivery address for Requesters/Requisitioners associated with multiple addresses (e.g., users in an agency with a centralized procurement office)? How are the default addresses determined?

There is no default Delivery Address pre-identified on the Requester or Requisitioner's profile. Requesters and Requisitioners can establish or update a default Delivery Address on their profile at any time.

Will users be able to select a delivery address that is not an agency address?

Users will be able to select any delivery address, not just the addresses for their agency. Users will also be able to add a delivery address not already in Ohio|Buys, which will require approval from an Agency Administrator before the order can be submitted and sent to the Supplier.

Is receiving required? When can I decide if I want to utilize receiving?

Receiving is not required in Ohio|Buys, but is encouraged. You should refer any specific receiving-related questions for your agency to your Agency Admin.

Can I add attachments or delete attachments when I make a purchase? Can supervisors, coworkers or fiscal add or delete attachments? What file types will be accepted as attachments?

The creator (Requester/Requisitioner) of the purchase requisition should upload all relevant attachments prior to submitting a PR for approval. Once submitted, Requisitioners and Agency Procurement Approvers can upload attachments as part of their review. Acceptable attachment types in the Ohio|Buys solution include some of the most common file types like PDF, Excel (.xls .xlsx), most image formats (.png, .jpg), and Word (.doc, .docx).

Are attachments and comments visible to Suppliers?

There are fields for both Supplier-facing, and internal attachments and comments. Do note, however, that a public records request could make all comments/attachments available to the Supplier after the fact.

Will it be possible to add attachments to a purchase order after it has been dispatched to the Supplier?

Adding additional internal and external attachments is not possible once a purchase order has been created. Creating a change order will create a new draft requisition where attachments can be added. The new requisition will then need to be resubmitted and approved, unless it is just a reduction in price and/or quantity in which case it will be approved automatically. Once approved, the new PO will supersede the initial PO, and be sent to the Supplier.

There are payment options on a purchase requisition (PR) such as EFT and CHK in OAKS that dictate how the Supplier will be paid. Will the Fiscal Agency Approver be able to update payment options on a PR as it goes through workflow?

The payment method is brought over from OAKS on the Supplier record (this field is called Supplier Location in Ohio|Buys). The Fiscal Agency Approver will have the ability to change the defaulted value via a drop-down on the purchase requisition (PR).

Can we change funding codes mid-cycle? (mid requisition cycle?)

If the purchase requisition status is in Draft or Initialized status, the chartfield information can be edited by the Requester, Requisitioner, Agency Procurement Approver or Fiscal Approver. If the purchase requisition status is ordered, the chartfield information can only be changed via the creation of a change order, but only if receipts and/or invoices have not yet been created.

Is the Release and Permit process in scope for the 2019 release? Currently, there are two processes (one that is DAS and one that is OIT.)

Release and Permit processes and workflow will be included in Ohio|Buys in 2019. Ohio|Buys will automatically route all PRs according to a workflow for the approvals that they require. All R&P processes are included in this workflow.

How will Controlling Board requests work in Ohio|Buys? Will the two systems integrate or will it be done thru OAKS?

When a user submits a purchase requisition (PR), Ohio|Buys will run a query to calculate the following:

- Is any part of the PR exempt from Direct Purchase Authority (DPA) or Controlling Board (CB)?
- Is the purchase exceeding either DPA or CB threshold?

The results of this query will appear on the Controlling Board tab of the PR via an integration. The purchase status and threshold status on the header of the PR will be used for workflow routing (i.e., if any line item has exceeded threshold, the workflow will route accordingly).

Will the federal debarment (sam.gov) status check include a status on the purchase request/purchase order (PR/PO) history?

There are no integrations to any of the sources to perform debarment status validations in the system. Debarment check will be performed as they are today. The only change is a debarment status on the Supplier record that can be updated by a Supplier Ops person. Internal State users will have the ability to check the Supplier record to see if a Supplier has been flagged on a debarment list (DAS, DOT, OFCC, SOS, Federal SAM, HHS).

Quick Quotes

How does the State's Three-Quote Solicitation process work?

2019 will introduce an exciting new feature called "Quick Quotes". You will be able to solicit quotes from Suppliers of your choosing directly within Ohio|Buys, and solicitations will automatically post to the public portal. The Suppliers of your choosing can be filtered on MBE Set Aside, however you can accept non-MBE bids. For more details on how this process will be conducted, please refer to the *Creating and Awarding Quick Quotes* and *Reviewing and Responding to Solicitations* training courses on the ELM or Ohio Learn.

When should I use quick quotes? Will Ohio|Buys tell me?

Ohio|Buys will indicate if your order contains an item that requires a quick quote.

Purchase Order Management

Who, other than the Supplier, will be notified automatically when a purchase order (PO) is dispatched?

The initial requester is automatically notified via email once the PR has received the final required approval. The Supplier is notified in the same manner once the PO has been dispatched from OAKS.

Does my Supplier automatically send me an order confirmation?

Suppliers are trained to acknowledge orders by coming into Ohio|Buys to generate that confirmation. This is not mandatory, but it is a best practice that we encourage Suppliers to follow. All Supplier training materials are available at:

<https://das.ohio.gov/Divisions/General-Services/Procurement-Services/Ohio|Buys>

How do I cancel an order I made in Ohio|Buys?

Purchase orders can be closed and cancelled using the Close/Cancel functionality. A purchase order should be Cancelled if there is a need to re-source the order, or if a change is required that is not permitted by a change order. A purchase order should be marked Closed after it has been invoiced and paid for. If part of the order has been invoiced against, you will not be able to cancel the order. Instead, use a change order to reduce the quantity down to the amount that has been invoiced, and close the order.

What happens when the PO # is not listed on the receipt and I am unable to associate it back to the PO?

For receipts created in Ohio|Buys, the associated PO# is a required field. In most cases the receipt will be created from directly within the PO itself.

Contracts

What Contracts/Catalogs will be implemented in 2019?

All DAS active contracts will be included in the 2019 release (listed on Procurement website).

When will top/all IT vendors be available in Ohio|Buys?

All active Suppliers are being brought into Ohio|Buys and will be available for purchases in the 2019 release. Note, however, that only DAS contracts are being imported at this time. Contracts with vendors (IT or otherwise) not associated with DAS will be imported in 2020.

Will existing contracts still be accessible outside Ohio|Buys?

In 2019, only DAS contracts are available in Ohio|Buys. Full contract information and non-DAS contracts will be made available as part of future releases. Current processes used to retrieve contract information will be maintained since not all agencies are implementing Ohio|Buys at this time. Any contracts not available in Ohio|Buys at this time (i.e. non-DAS contracts) will remain available in OAKS to purchase from.

When a contract is approved, do other agencies that have the contract go back to the user/requester for approval?

In the 2018 and 2019 releases, Contract Analysts create contract shells for catalog purposes. A Requester would then shop for that catalog item and submit their purchase requisition to their supervisor for approval.

Requisite Procurement Programs

As a Requisite Program, how are we notified of new requests?

You will receive an email notification of your open workflow tasks. These notifications will also appear in your pending validations via your homepage and in the pending validations section of your profile.

As a Requisite Approver, how do I add comments to a reject/deny?

Mandatory comments are required for all rejected/denied approvals and Ohio|Buys will prompt you to enter one upon rejecting a PR. Additionally, on the requisition there is an internal comment field located in the middle of the page. Note, all comments provided by the Requisite Approver will be automatically be issued via email.

How do I see which requisite program granted me a waiver for my purchase requisition?

You will have the ability to review each step in a requisition under the Workflow tab and on the Requisite Program tab on the left navigation panel.

Is ServiceNow integrating with Ohio|Buys for software purchases, telecommunications, anything with a data plan or computer?

ServiceNow will still be used for software, computer, telecommunications and data plan purchases. ServiceNow telecom items will be available in the Ohio|Buys catalog. Users will click a URL link on the catalog item which will take them to the ServiceNow site to make their purchase as they do today.