



Buys

Connecting Buyers and Suppliers

January 30, 2020 Newsletter

As January comes to a close, the Ohio|Buys team is working hard to continue improving the system to assist buyers and suppliers. We are continuing to engage our early adopter agencies, conduct training efforts, and explore additional ways to receive feedback in real-time in order to provide you with the best service possible.

What We're Working On

Additional Requester Training

In addition to the web-based Requester training, agency users have communicated that additional training opportunities for Requesters would be helpful. The Ohio|Buys team is excited to announce that those with a Requester role in Ohio|Buys now have two more options for additional training and support!

Requester Webinars

Requester training webinars will be held from February 4th to February 6th. Each 1-hour webinar will provide an overview how to create and manage purchase requisitions in Ohio|Buys, as well as provide time for questions. It is not necessary to attend more than one session as the topics reviewed will be the same in all sessions.

Requester Webinar Schedule and Access Information

To join a webinar, choose the date and time you'd like to attend and follow these steps:

1. About 5 minutes before the start time, click the link below associated with the webinar you would like to attend.
2. To join the conference call, please dial: **1-844-425-8144** and enter Passcode: **5731989362#**

Date	Time	Webinar Link
	10:00 AM	Join Ohio Buys Requester Webinar #1

Tuesday, February 4	2:00 PM	Join Ohio Buys Requester Webinar #2
Wednesday, February 5	10:00 AM	Join Ohio Buys Requester Webinar #3
	2:00 PM	Join Ohio Buys Requester Webinar #4
Thursday, February 6	10:00 AM	Join Ohio Buys Requester Webinar #5
	2:00 PM	Join Ohio Buys Requester Webinar #6

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>

Requester Virtual Office Hours

Requester Virtual Office Hour sessions will be available from February 10th to February 13th during which users can sign up for a 30-minute, one-on-one support session with an Ohio|Buys trainer. During the session, users can walk through an example or an actual requisition they want help with, as well as ask any questions related to the Ohio|Buys purchase requisition process. Please be aware Ohio|Buys trainers cannot advise on Agency or State policy or procedures.

To sign up for a 30-minute time slot, select the day you would like to attend and click the Register link for either Session 1 or Session 2. Each session has twelve 30-minute time slots throughout the day. Select the time slot that works best for you. If a 30-minute time slot is taken in Session 1, check Session 2 to see if that time slot is available.

After completing the registration process, you will receive a confirmation email with the webinar and teleconference details.

Date	Time	Registration Link
Monday, February 10	Session 1	Register
	Session 2	Register
Tuesday, February 11	Session 1	Register
	Session 2	Register
Wednesday, February 12	Session 1	Register
	Session 2	Register
Thursday, February 13	Session 1	Register
	Session 2	Register

Tips to Remember

Ordering and Account Codes

If you are ordering items from another state agency ensure the automatically populated Account Code for each line item is updated to the correct IntraState Transfer Voucher (ISTV) value.

Ship to Address Changes

When a Purchase Requisition is created, a Ship To address is required at the header. This Ship To address is automatically assigned to any items added to the requisition. After submission, any subsequent changes to the Ship To address at the header must also be made at the line item – those changes will not automatically pass from the header to the line items.

To update Ship To addresses on the line items, click the pencil icon next to the line item you want to change, scroll to the Define Delivery Place section and select a new Ship To address. To edit the Ship To address for multiple line items, select the lines to be updated, click on the Edit Lines button, and select the Ship To address field. Please note, you must select the Replace radio button (not Add) before clicking Save & Close to update all the Ship To addresses that were selected.

Delegating to Another Users in Ohio Buys – Requisitioners, Supervisors, Approvers

When a user delegates their work to be handled by another user, the purchase requisition will always send an email notification to both individuals and show up in both users' My Pending Validations lists in Ohio|Buys. The purchase requisition will remain in both users' Pending Validations lists until the delegated user takes action on the purchase requisition.

Approver Rejects a Purchase Requisition or PO Change Order

When an approver rejects a purchase requisition or PO Change Order, the work item is routed back to the requisitioner via workflow. The approver should document in the comments section the reason why they are rejecting the requisition or PO Change Order prior to clicking the Reject button. The requisitioner should then make the appropriate changes to the requisition and PO Change Order and resubmit it for approval.

Key Term of the Week

Pre-Governed Contract - A contract established by the Office of Procurement Services that has already completed the IT Governance (review) process and will automatically populate a Release and Permit on a requisition after Requisitioner, Agency Procurement and Agency Fiscal approvals.

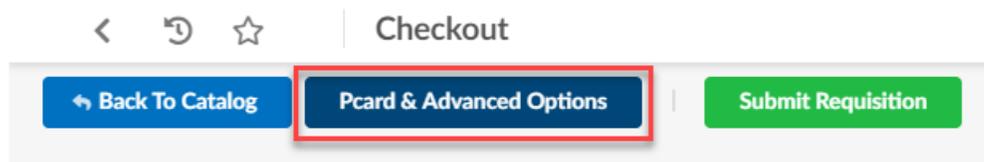
Solutions for the Week

Closing Quick Quotes

Recently, a bug was identified where quick quotes were not automatically closing after the end date and time had passed because the Close Automatically checkbox for a quick quote was not automatically selected. Moving forward, all future quick quotes will be automatically closed after the end date and time has passed. To close an existing quick quote where the Close Automatically checkbox was not selected, please provide your Agency Admin with the Sourcing Project number (e.g., BPM000182) and they will open the quick quote and select Close from the Other Actions drop-down menu.

Ease of Use for New PCard Users

There has been some confusion with Pcard users and how to apply their Pcard to a purchase requisition. To simplify this, the Show Advanced Options button on the initial checkout page has been renamed to Pcard & Advanced Options.



Once a user clicks this button, they are able to slide the Pcard slider and apply their Pcard to the purchase requisition.

NOTE: Your Pcard **must be saved** in your Ohio|Buys profile before it can be applied to your purchase requisition.

Purchase Order Assignment

Purchase orders were previously being assigned to Requesters rather than Requisitioners at the Requisitioner Review step of the PO workflow. Moving forward, all purchase orders

will be assigned to Requisitioners rather than Requesters at the Requisitioner Review step of the workflow. Only Requisitioners will have the ability to close or cancel a purchase order.

Helpful Links

Below you will find links to valuable information and training for Ohio|Buys:

[FAQs](#)

[Key Terms](#)

[Course Curriculums](#)

[Job Aids](#)

[Supplier Online Videos](#)

[Supplier Portal](#)

[OBM Supplier Forms](#)

[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](#)).

Thank you for your partnership and willingness to help build a solution that will not only benefit your agencies, but Ohio as a whole.



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

