Pre-Business Team Training

These mandatory eLearning modules are meant to provide you with an introduction to Ohio|Buys and the procurement-related tasks and processes you will be completing. These modules will introduce concepts and processes so you can hit the ground running during business team training.

Accessing and Navigating Ohio|Buys:
- Accessing and Navigating Ohio|Buys for State Users eLearning (OPS-SM-100) (20 min)
- Accessing and Navigating Ohio|Buys (New Bidders) eLearning ** (25 min)
- Accessing and Navigating Ohio|Buys (Existing Suppliers) eLearning ** (15 min)
- Bidder Registration and Reviewing EOD Documentation eLearning (OPS-SM-101) (15 min)

Exceptions, Improvement Plans and Performance Evaluations:
- Creating and Managing Exceptions eLearning (OPS-SM-102) (15 min)
- Creating and Managing Improvement Plans eLearning (OPS-SM-103) (15 min)
- Reviewing and Closing Exceptions eLearning (OPS-SM-104) (15 min)
- Reviewing Exceptions and Updating Improvement Plans (Suppliers) eLearning ** (10 min)
- Creating and Finalizing Performance Evaluations eLearning (OPS-SM-105) (30 min)
- Completing Performance Evaluation Questionnaires eLearning (OPS-SM-106) (15 min)

Purchase Requisitions:
- Submitting Goods and/or Services Requests eLearning (OPS-RP-109) (30 min)
- Creating and Submitting Purchase Requisitions eLearning (OPS-RP-105) (60 min)
- Creating Blanket Orders and Adding Subscription/Milestone Terms eLearning (OPS-RP-106) (30 min)
- Reviewing and Updating Purchase Requisitions eLearning (OPS-RP-111) (15 min)
- Approving Purchase Requisitions eLearning (OPS-RP-108) (30 min)

Purchase Orders:
- Reviewing and Managing Purchase Orders eLearning (OPS-RP-113) (20 min)
- Reviewing and Acknowledging Purchase Orders (Suppliers) eLearning ** (10 min)

** Bidder/Supplier training materials are available at: https://das.ohio.gov/Divisions/General-Services/Procurement-Services/eProcurement#52261220-supplier
Agency Admins are able to view and edit all Sourcing, Contracts, Catalogs and Procurement across their agency. The Agency Admins approve one-time address requests and update requisition approval workflow performers for their agency.

**Pre-Business Team Training**

These mandatory eLearning modules are meant to provide you with an introduction to Ohio|Buys and the procurement-related tasks and processes you will be completing. These modules will introduce concepts and processes so you can hit the ground running during business team training.

- **Quick Quote Solicitations:**
  - Creating and Awarding Quick Quotes eLearning (OPS-RP-101) (30 min)
  - Viewing and Responding to Solicitations (Suppliers) eLearning ** (15 min)

- **Receipts and Returns:**
  - Creating Receipts and Returns eLearning (OPS-RP-103) (30 min)
  - Managing Shipping Notices and Returns (Suppliers) eLearning ** (10 min)

- **Invoices:**
  - Creating and Managing Invoices (Suppliers) eLearning ** (15 min)

- **Contracts and Catalogs:**
  - Creating and Managing Contract Shells eLearning (OPS-SC-100) (15 min)
  - Hosted Catalog Management eLearning (OPS-SC-101) (30 min)

- **Reporting:**
  - Running and Accessing Reports eLearning (OPS-EP-100) (15 min)

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**Business Team Training**

**Core Agency Training Curriculum**
- Attend a 1-day end user training session as a participant
- Rehearse training classes including any exercises
- Understand key concepts and terms, and training curriculum and content

**Learning Lab**
- Attend a 1-day follow up session to practice course content
- Practice training exercises in the training environment
- Review any questions and identify areas to emphasize during end user training

**Post Go-Live**
Post Go-Live training consists of access to the relevant eLearning modules and associated job aids. This training is designed to refresh or walk you through your role-specific tasks in Ohio|Buys.

**eLearning Modules**
- Pre-Classroom Training eLearning modules (see above)

**Job Aids**
**Accessing and Navigating Ohio|Buys:**
- 01.01.01 General Navigation (for State Users) Job Aid
- 01.01.02 Review a Supplier Record Job Aid
- 02.01.01 Access Ohio|Buys as a New Bidder Job Aid
- 02.01.02 General Navigation (for Suppliers) Job Aid
- 02.01.03 Account Management Job Aid
- 02.02.01 Review EOD Status Job Aid
- 02.03.01 Access Ohio|Buys as an Existing Supplier Job Aid

**Exceptions and Improvement Plans:**
- 03.01.01 Create an Exception Job Aid
- 03.02.01 Review an Exception Job Aid
- 03.02.03 Edit and Close an Exception Job Aid
- 03.03.01 Create an Improvement Plan Job Aid
- 03.03.02 Manage and Close an Improvement Plan Job Aid
- 03.04.01 Review and Update an Exception Job Aid
- 03.04.02 Update an Improvement Plan Job Aid

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**Performance Evaluations:**
- 04.01.01 Create and Finalize a Performance Evaluation Job Aid
- 04.01.02 Complete a Performance Evaluation Questionnaire Job Aid

**Purchase Requisitions:**
- 05.01.01 Submit a Goods and/or Services Request Job Aid
- 05.02.01 Submit a Hosted Catalog Purchase Requisition Job Aid
- 05.02.02 Submit a Punch-Out Catalog Purchase Requisition Job Aid
- 05.02.03 Submit a Freeform Purchase Requisition Job Aid
- 05.02.04 Submit an After-the-Fact Purchase Requisition Job Aid
- 05.02.05 Duplicate and/or Cancel a Purchase Requisition Job Aid
- 05.02.06 Submit a Request for Solicitation Job Aid
- 05.02.07 Add an Ad Hoc Delivery Address Job Aid
- 05.02.08 Submit an Emergency Purchase Requisition Job Aid
- 05.02.09 Order Items from a Dealer Job Aid
- 05.02.10 Manage Default Purchase Requisition Information Job Aid
- 05.02.11 Submit an ODOT Purchase Requisition Job Aid
- 05.02.12 Order a Generic Product Job Aid
- 05.02.13 Create a Purchase Requisition with a Requisite Procurement Agency Job Aid
- 05.02.14 Controlling Board and Direct Purchase Authority Calculations Job Aid
- 05.02.15 Release and Permit Overview Job Aid
- 05.03.01 Create a Blanket Order Job Aid
- 05.03.02 Add Subscription or Milestone Terms Job Aid
- 05.04.01 Review and Update a Purchase Requisition Job Aid

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**Purchase Requisition Approval:**
- 05.05.01 Review a Purchase Requisition (Agency Supervisor) Job Aid
- 05.05.02 Review a Purchase Requisition and Approve a One-Time Address Change (Agency Admin) Job Aid
- 05.05.03 Review a Purchase Requisition (Procurement Agency Approver) Job Aid
- 05.05.04 Review a Purchase Requisition (Fiscal Agency Approval) Job Aid
- 05.05.05 Review a Purchase Requisition (Final Agency Approver) Job Aid
- 05.05.06 Review a Purchase Requisition (IT Approvers) Job Aid
- 05.05.07 Review a Purchase Requisition (DAS Central Approver) Job Aid
- 05.05.08 Review a Purchase Requisition (Requisite Procurement Program Agency Approver) Job Aid
- 05.05.09 Review a Purchase Requisition (Central SME Approval) Job Aid
- 05.05.10 Delegate Approvals Job Aid
- 05.05.11 Forward a Purchase Requisition Job Aid

**Manage Agency Approval Paths:**
- 05.06.01 Manage Agency Approval Paths Job Aid

**Purchase Orders:**
- 06.01.01 Manually Send a Purchase Order to a Supplier Job Aid
- 06.01.02 Create a Change Order Job Aid
- 06.01.03 Close or Cancel a Purchase Order Job Aid
- 06.01.04 Review a PCard Order Job Aid
- 06.01.05 PO Integration Errors Job Aid
- 06.01.06 Purchase Order Payment Tab Overview
- 06.02.01 Review and Acknowledge a Purchase Order or Change Order Job Aid

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Agency Admins are able to view and edit all Sourcing, Contracts, Catalogs and Procurement across their agency. The Agency Admins approve one-time address requests and update requisition approval workflow performers for their agency.

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**Quick Quote Solicitations:**
- 07.01.01 Create and Release a Quick Quote Solicitation Job Aid
- 07.01.02 Analyze and Award a Quick Quote Solicitation Job Aid
- 07.01.03 Upload a Supplier’s Response Job Aid
- 07.01.04 Create a New Round Job Aid
- 07.02.01 View and Respond to a Solicitation Job Aid

**Receipts and Returns:**
- 08.01.01 Create and Manage a Receipt Job Aid
- 08.01.02 Create a Return Job Aid
- 08.01.03 Create a Mass Receiving Receipt Job Aid
- 08.01.04 Approve an Invoice Job Aid
- 08.02.01 Create an Advanced Shipping Notice Job Aid
- 08.02.02 Confirm or Reject a Return Job Aid

**Invoices and Credit Notes:**
- 09.01.01 Create an Invoice Job Aid

**Contracts and Catalogs:**
- 10.01.01 Create a Contract Shell Job Aid
- 10.02.01 Upload a Catalog Job Aid
- 10.02.02 Complete Catalog Enablement Job Aid
- 10.02.03 Review and Publish a Hosted Catalog Job Aid
- 10.02.04 Create a Catalog Item Job Aid
- 10.02.05 Update a Hosted Catalog Job Aid

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Reporting:
► 11.01.01 Access and Run an Analysis Report Job Aid
► 11.01.02 Run a Query Job Aid

Admin Job Aids:
► Access and Review the Public Catalog Job Aid
► Review Public Solicitations Job Aid
► Manage Supplier Contacts Job Aid
► Create State User Accounts Job Aid
► Disable State User Accounts Job Aid