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GENERAL QUESTIONS

Does Ohio|Buys contain all contracts issued by the DAS Office of Procurement Services (e.g., Competitively Selected contracts, Master Maintenance Agreements, Master Service Agreements, State Term Schedules, etc.), and are the suppliers that hold those contracts available in the solution?

Yes. All contracts issued by the DAS Office of Procurement Services are set up in Ohio|Buys. Additionally, all active OAKS suppliers are available to be purchased from in Ohio|Buys. Note that some contracts have associated catalogs loaded with $0 listed as the price. The agency will need to update the price based on their quote from the supplier(s).

Can suppliers submit invoices through Ohio|Buys?

Yes, the PO to Invoice flip functionality is turned on in Ohio|Buys. There was an enhancement made that allowed Suppliers to add comments/attachments to an invoice. Suppliers can flip a PO into an invoice in Ohio|Buys and submit it for approval. When an invoice is submitted in Ohio|Buys, the Requester will need to approve the Supplier’s invoice before it is sent to OAKS for processing and payment. Ohio|Buys has daily interfaces to show payment and voucher information from OAKS. Note: Any comments/attachments provided with an invoice are not passed into OAKS and users (e.g., voucher processors will need to view this information in Ohio|Buys).

What does HCM mean?

HCM refers to the OAKS Human Capital Management system, which captures user data such as employee name, their State of Ohio User ID, and their Supervisor. (See Key Terms document).

What does RFx mean?

A solicitation in Ohio|Buys that is composed of lots and rounds. An RFx is always associated to a Sourcing Project; a Sourcing Project may have multiple RFx's associated to it. Note: A Sourcing Project is any kind of sourcing event in Ohio|Buys. This includes all types of solicitations, as well as Quick Quotes. Sourcing projects can have multiple lots and/or rounds. (See Key Terms document).

What are "lots"?

Lots can be used to clarify information or separate the different needs contained within a specific solicitation. Lots are typically issued for Bidder and/or Supplier clarifications. For example, a user may wish to separate a solicitation for a conference into different lots. One lot could be created for food, while another could be created for IT equipment. (See Key Terms document).

If new POs are entered in Ohio Buys, do the Fiscal folks need to continue accessing both the OAKS and Ohio Buys systems since POs live for multiple years? Old POs would be in OAKS and new POs would be in Ohio Buys.
Fiscal staff will be able to access the POs in OAKS and Ohio|Buys. OAKS is still the accounting system of record and accounts payable activities will still take place in OAKS. During the transition, there will be POs originating from both systems.

**Since budgets and appropriations are in OAKS, how will Ohio Buys determine availability of appropriations for POs and Vouchers entered in Ohio Buys?**

As part of the requisition workflow, there are multiple budget checks (i.e., real-time calls to OAKS) to check if there is budget available for the purchase. When the requisition is created and sent to OAKS, it will undergo a final budget check prior to the PO being dispatched just like what happens today for OAKS-generated POs. The voucher build process is not something that’s moving to Ohio|Buys, vouchers will continue to be created in OAKS.

**Do you know what reports other agencies have been using to provide the info you request on the playbook about volumes of various transactions types? Also, due to the COVID budget issues this past year, instead of entering a normal number of POs, Fiscal had to enter POs each quarter. So, the volume of POs would be inflated.**

You raise a good point that FY21 PO counts may be artificially inflated due to the quarterly budgeting approach. We are checking with other phase 2 agencies to see if they can provide some insight into what reports they’ve used (we guess they’re probably running BI reports.)

**Will Capital POs and Vouchers be completed in Ohio Buys also? Or will Capital transactions remain in OAKS?**

The Ohio|Buys team is working with OFCC with regards to getting OFCC contract numbers and release and permits loaded into Ohio|Buys, but it remains a work in progress. Until those are incorporated into Ohio|Buys, agencies will need to complete capital POs referencing an OFCC contract and/or release and permit in OAKS.

**SOLICITATIONS**

**What kind of solicitations can be created in Ohio|Buys?**

Agencies will be able to create a wide variety of solicitations, such as double and triple envelope solicitations, in Ohio|Buys (previously, only quick quoting took place in Ohio|Buys).

**Will people working on a solicitation have to work both inside and outside Ohio|Buys?**

Ohio|Buys provides a single location for team members to collaborate on creating and preparing solicitations. In addition, Ohio|Buys will now be the primary solution for creating and launching solicitations. Bidders and Suppliers are able to submit all solicitation response documentation within the system.

**Can questionnaires for bidding be used in Ohio|Buys?**

Mandatory, technical, and financial questionnaires can be individually configured, weighted, and evaluated in Ohio|Buys. In addition, Ohio|Buys provides procurement users with robust questionnaire scoring tools to assist with response evaluation.
Will solicitations be reviewed and/or approved in Ohio|Buys?
Solicitations will follow a clearly defined approval workflow in Ohio|Buys for their review and posting. This way, all solicitation reviews and approvals will now occur in Ohio|Buys.

How does a user know that team members are completing their assigned step in Ohio|Buys?
Ohio|Buys offers detailed task management capabilities that enable users to closely track progress on a solicitation. In addition, users can review the status in the workflow section.

After a solicitation is posted in Ohio|Buys, agency team members that are associated with that solicitation can see which Bidders and/or Suppliers have reviewed the solicitation and who has submitted responses; however, all submitted responses for a solicitation are sealed until after the Bid Due Date has passed.

How are bidder questions handled?
All Bidder and Supplier inquiries and questions can be submitted and answered inside of Ohio|Buys and can be posted on the Ohio|Buys Public Solicitations page. Note: inquiries for quick quotes and public notice solicitations cannot be submitted through Ohio|Buys (as the intent of these types of solicitations are to be for simple needs where inquiries aren’t necessary and for those where the remainder of the process is taking place offline/outside of Ohio|Buys, respectively).

Who creates new rounds or lots for solicitations?
Contract Analysts can create new rounds or lots to issue amendments and clarifications for a solicitation.

Can people work together on a solicitation message each other within their sourcing project?
Agency solicitation team members can take advantage of Ohio|Buys Sourcing blog to route internal messages related to a solicitation easily.

What if I need someone else (not on the project team) to review or approve the solicitation?
Ohio|Buys allows Contract Analysts to add ad hoc and/or posting approvers to a solicitation as needed. In addition, reviewers are able to forward a solicitation to an additional reviewer as needed.

Will I be able to analyze award scenarios?
Yes, Ohio|Buys creates in-system pivot tables to analyze and simulate different award scenarios.
What is the point of a triple envelope solicitation?
This allows for three envelopes (stages) of the solicitation: mandatory / technical / cost.

How does a state user communicate questions about a solicitation to other state users associated with the solicitation?
Ohio|Buys leverages an "inquiry" section so the entire team can see what is asked. In addition, a response can be crafted and posted publicly. The system is configured to prevent internal questions and answers amongst state team members associated with the solicitation from being posted publicly.

Can envelopes be opened during consensus meetings, or will individual users be doing this separately?
Only the sourcing responsible role can open an envelope, and envelopes can only be opened in sequence (i.e., mandatory opened before technical, technical opened before cost). Once an envelope is opened, those with permission can review the contents.

Is Ohio|Buys okay with the length of time it may take to complete and RFx and the varying components that are sometimes required (e.g., workflow to various people)?
Yes, the work can be done in Ohio|Buys, or prework can be completed first and then input into Ohio|Buys.

Who is responsible for responses being stamped in?
Ohio|Buys will automatically timestamp when a response was submitted.

How is the solicitation handled when others are responsible for tasks? Will rules be set up in the system for approvals, user?
Ohio|Buys allows Contract Analysts to add adhoc and/or posting approvers to a solicitation as needed. In addition, reviewers are able to forward a solicitation to an additional reviewer as needed. There is not a rules engine in the solicitation module.

What will happen if a bidder/supplier submitted their paperwork during the bid process, and they are not yet noted in the system as an MBE?
Ohio|Buys is designed such that if the solicitation is marked as an MBE set-aside solicitation and there is not a valid MBE certification on the supplier's profile (i.e., MBE is not listed on their profile or the expiration date of their MBE certification is less than the current date), the button to submit a proposal for the solicitation is not visible. Suppliers and bidders are strongly encouraged to proactively monitor their MBE certification and keep it current.

If a supplier has submitted the required information to obtain/renew their MBE certification, the update will need to be completed and make its way onto the OAKS supplier record and then interfaced over to Ohio|Buys (this interface takes place daily, meaning that this update must be present on the Supplier record in Ohio|Buys before the due date in order for the supplier to submit a response.

If a bidder has submitted the required information to obtain/renew their MBE certification, the change request will be routed through an approval workflow in Ohio|Buys. Upon approval of the
change request, the updated MBE certification will be available on the bidder’s record – allowing the bidder to submit their response.

Will the system prevent a non-MBE user from bidding when the solicitation is MBE Set-Aside?
Yes, Ohio|Buys will not allow a non-MBE supplier to bid on an MBE-Set-Aside solicitation.

Is there a notification to those who are not MBE bidders that their bid won’t count?
No, however, there is a statement listed on the header of MBE Set-Aside solicitations informing users that only those bidders/suppliers with an active MBE certification at the time the solicitation closes can submit a response.

Will the review be held up if waiting on a bidder to receive their MBE status?
No, Ohio|Buys is designed such that if the solicitation is marked as an MBE set-aside solicitation and there is not a valid MBE certification on the supplier’s profile (i.e., MBE is not listed on their profile or the expiration date of their MBE certification is less than the current date), the button to submit a proposal for the solicitation is not visible.

Will there be standard templates to use?
Yes, there will be standard templates available, which will be managed by the State Template Manager. Also, there is also a template manager role for agencies to also manage agency-specific templates.

What does the Yellow Caution icon indicate on the Inquiries tab?
It indicates the inquiry was sent by a Bidder or Supplier.

Will contracts still need to be manually entered in OAKS?
No, Ohio|Buys will integrate with OAKS and will send contract data over after the contract has been signed.

If a Bidder is not registered in OB and they are awarded a bid, how long do they have to get registered before a contract is awarded and is there any notification in OB that lets them know they must complete process prior to contracting?
There is no notification. If they are a Bidder, they will need to go to https://supplier.ohio.gov/wps/portal/sp/suppliers/login to get fully registered.

If a contract is canceled with one Supplier and then awarded to another Supplier, what records does OB keep for documentation for a public records request?
The original contract that is created for the first Supplier is retained but is not shown on the public contracts page. So, when the Public Records Requests are being fulfilled, the user could find and reference the original not selected contract/Supplier.
If a solicitation gets no bids or responses from Suppliers, does the State need to cancel the solicitation? Or can they let the clock run out on the Bid Close Date and create a new Round with a future date for responses?

In most scenarios, the State will issue a new round unless the analyst decides that there are no potential suppliers who can supply the requested goods/services.

What is the proper procedure when you post a solicitation and do not get any responses?

A new round can be created and posted with a revised bid due date.

Why doesn't the system require an award justification when clicking the trophy icon?

This is a different experience vs. when users select the Total on the Awarding tab.

If a vendor answers a mandatory question incorrectly while submitting a proposal, are they disqualified at that moment? Or only when the envelopes are opened?

The Contract Analyst disqualifies them as they are completing their evaluation of that particular envelope.

If a document is uploaded on the Setup Documents tab with "Public" as part of the Document type, will it be automatically posted with each subsequent lot and round of the sourcing project?

They are not. They will be posted with the solicitation when it is awarded. To post these documents with the initial solicitation posting, you can use the Attach Existing Document button on the Documents section of the Prepare Solicitation tab.

On the View Solicitation Activity tab, why does it show Provided in the NDA column even if our solicitation did not require an NDA?

If a Supplier has provided an NDA in the past, it is saved to their record and will show as provided on the View Solicitation Activity tab.

If an amendment is issued as a new round, will Suppliers need to resubmit their response?

Yes, any Suppliers who previously submitted a response will need to re-submit their response as part of the new round. To make this easier, Suppliers are able to copy their response from a previous round into the new round, make updates, and submit.

How should Best and Final Offers (BAFOs) be handled in Ohio|Buys?

BAFOs will be handled through the contract negotiation process. You will create an award for the supplier(s) who would like to negotiate with and then complete negotiations.
What happens if a Supplier has an issue submitting their response?
Suppliers will have access to training materials and can submit OSS tickets for help. Similar to today, if the Supplier misses a Bid Due Date, there are no exceptions. In addition, going forward all responses for Ohio|Buys solicitations will need to be submitted electronically.

When completing an evaluation, do you need to enter a whole number, or can you use decimals?
You can only enter whole numbers.

What is the maximum number of characters in the Solicitation Name field?
The Solicitation Name field supports 192 characters.

Is there a way to create a child solicitation without issuing an entirely new round?
No, this is not possible in Ohio|Buys.

Some Proposals are listed as Confidential and Redacted versions, can Contract Analysts select which box to checkmark on those uploaded documents?
When you do the RFP in OB, the proposal will be saved within the solicitation object. There is a "records review" process that kicks off in the solicitation after contract signature, where it sends to legal/PRR team to review and approve RFP responses for what will be posted. You can/will pull forward that response into the contract when you negotiate and award, but we will save that as an internal or confidential document. The responses for RFP's will be reviewed before being posted to the solicitation page and should be saved internally in the contract.

CONTRACTS
Will Ohio|Buys support working on contracts?
Yes. Ohio|Buys is the new contract management solution and provides a full range of contraction creation and management functionality.

How will Agency Contracts be created and not have it go to OAKS?
Agency administered contracts will be prevented from going into OAKS via configuration rules (the Contract Owner field will not be visible on Agency Administered contracts, and the contract interface between Ohio|Buys and OAKS only looks at contracts where the Contract Owner field is populated).

Can a user add all of the internal contacts on the Contracts at the beginning of the contracting process?
Yes, Ohio|Buys allows Contract Analysts to add and remove team members to a contract as needed.
Can contract renewals be completed in Ohio|Buys?
Yes, contract renewals are handled in Ohio|Buys using amendments. Contract amendments are linked to the original contract and are used for renewals, adding/removing subcontractors/dealers, and changing other details of the agreement.

Does the contract need a wet signature or e-signature?
The State’s enterprise standard electronic signature solution, OneSpan Sign, will be integrated with Ohio|Buys, allowing for contracts to be signed electronically. Wet signatures can also be obtained and uploaded into Ohio|Buys.

Agencies will not need to purchase their own electronic signature transactions in order to use the OneSpan Sign integration with Ohio|Buys; DAS will purchase transactions, and agencies can create electronic signature transactions as needed.

Once the contract is created in Ohio|Buys who puts the contract into OneSpan for signature?
Integration will take a user’s credentials into OneSpan Sign for electronic signature. The requests for signatures are set up by the contract analyst.

Does the entire contract need to be authored in Ohio|Buys?
Users can leverage the Ohio|Buys Microsoft (MS) Word Authoring feature to develop contracts in Ohio|Buys while still using MS Word to write the contract. However, contracts can also be edited directly within Ohio|Buys, and universal contract templates can be leveraged while drafting.

Users can also upload a copy of a contract if it has already been negotiated and signed outside of Ohio|Buys.

Direct Purchase Contract
As a reminder, all Direct Purchase Contracts in Ohio|Buys requires the suppliers that request them to agree to the State’s Standard Terms and Conditions; however, as these are not DAS OPS contracts, they are subject to the $50,000 Direct Purchase Authority limit or agencies must have Controlling Board approval to exceed their threshold with that supplier. For example, the Amazon catalog is part of a Direct Purchase Catalog from a Direct Purchase Contract.

How are Direct Purchase Catalogs reviewed and approved?
Suppliers will submit a request, and then it is routed to the Catalog Enablement team for review and approval before it is posted. A Supplier is unable to post their catalog before it goes through this review. Also, the various checks in the PR workflow will also route certain types of purchases (based on commodity code) for additional levels of review before a purchase can be made.

What is the default notification period? i.e., if you don’t put anything in the notification period on the contract, what is the default lead time before the system will notify users that the contract is expiring?
There is no notification if the field is left blank.
Can you notify more than one person that a contract is expiring? (i.e., internally, can you have multiple people notified). Furthermore, are Suppliers on the contract notified as well? If so, how many?

Only the user responsible for the contract will be notified. They can forward the email to other users as needed. Analysts can also pull the expiring contracts query.

Which users have the ability to lock/unlock clauses? Can external users (i.e., Suppliers) ever unlock a clause?

Suppliers can never unlock clauses. Agency users can lock/unlock any clause.

Can users flip a Quick Quote into a Contract like they can with other Requisitions?

Yes, this is possible.

Some Proposals are listed as Confidential and Redacted versions, so will analysts be able to select which box to checkmark on those uploaded documents?

When you do the RFP in OB, the proposal will be saved within the solicitation object. There is a "records review" process that kicks off in the solicitation after contract signature, where it sends to legal/PRR team to review and approve RFP responses for what will be posted. You can/will pull forward that response into the contract when you negotiate and award, but we will save that as an internal or confidential document. To say another way, the responses for RFP's will be reviewed expiration date?prior to being posted to the solicitation page and should be saved internally in the contract.

Which date drives the contract expiration notification date. Is it the original contract end date or the extended contract end date? Also, does the notification go out 6 or 3 months prior to the contract?

The notification date is driven by either the original or the current end date - Ohio|Buys calculates based on whichever of these dates is later. The notification goes out 3 months prior.

Do you have to follow all of the steps in the contract process if you do not need them?

No - the only two required steps in contracting are Draft and Signature.
REVENUE SHARE

Will revenue share be tracked in Ohio|Buys?
Yes, Ohio|Buys will track revenue share for applicable contracts. The Revenue Share tab is only visible when Revenue Share is indicated as ‘Yes’ on the Contract Header and will only be visible to Contract Analysts, Procurement Managers, Revenue Share users, Suppliers, and DAS Compliance Specialists. Ohio|Buys will be the system of record for contract revenue share.

Where can a user see revenue share information?
The Revenue Share tab for a contract in Ohio|Buys will display state agency spend, Cooperative Purchasing (Co-op) members spend reported by the Supplier, the amount due per fiscal quarter, revenue share payments, and Co-op reported spend. Only Contract Analysts, Procurement Managers, Revenue Share users, Suppliers, and DAS Compliance Specialists can see the Revenue Share tab: Contract Analysts, Procurement Managers, Revenue Share users, and DAS Compliance Specialists. In addition, the Revenue Share tab is only visible when Revenue Share is indicated as ‘Yes’ on the Contract Header.

What if there is an issue with the revenue share information?
If there are issues regarding revenue share information, DAS and Co-op users can create an exception against a Supplier in Ohio|Buys. Exceptions replace the existing Complaint to Vendor (CTV) process.

How will an Agency get electronic signatures on documents prior to obtaining a Controlling Board number? In this case, the Supplier will need to have already signed.
Agencies can proceed to the contract signature step of the Ohio|Buys contract workflow and create their electronic signature transaction, then obtain the Supplier’s electronic signature. Once the Supplier’s signature is obtained, the agency can send a copy of the contract signed by the supplier to the Controlling Board. After the agency obtains a Controlling Board number, the State users who need to electronically sign the contract can do so – allowing the contracting workflow in Ohio|Buys to be completed.

If controlling board approval is needed on a solicitation award for an RFP, at what point is the transaction put on hold to get the Controlling Board (CB) approval, and where is that CB# entered once received?
The Controlling Board number is entered on the Contract in the Controlling Board Number field. This is only mandatory for agency administered contracts. There will be an alert when the contract would cause the agency to exceed their Controlling Board threshold; a non-blocking alert will appear when creating the contract and a blocking alert will appear at the Signature step.
Regarding contract pricelists (i.e., catalogs), what workflow steps do the contracting entity and suppliers go through? Is an agency responsible for updating the price list?
Suppliers or State users (e.g., Catalog Analyst, Contract Analyst) can upload a pricelist into Ohio|Buys. After a format check to verify that the data is formatted properly and there are no import errors, the pricelist routes to the Contract Analyst that is responsible for the contract that the pricelist is associated.

CATALOGS
Do users functionally need to hit Validate All Lines when approving a catalog as the Contract Analyst? If they do not but click Approve, does the system automatically validate all lines? Additionally, what happens if users either validate or block lines AFTER the catalog has been approved since they can still use those buttons?
They need to click Validate All Lines, or no updates will be made to the catalog. Users should ALWAYS click Validate All Lines before clicking Approve. Clicking the button after clicking Approve will not do anything.

Is the catalog template for supplier use on the Ohio|Buys supplier page?
The spreadsheet is available on the Supplier tab of Ohio|Buys website.

How should the Product Code be formatted? Should we include CTR and a 0 (e.g., CTR002305-06 or 2305-6)?
Include CTR and 0 in the formatting. For example, the 6th product on CTR002305 would have a Product Code of CTR002305-06.

If you have contracts in Ohio|Buys that do not have a price list, should you issue an amendment to add items?
Yes, you should create an amendment if you need to add the price list for a contract.

QUERIES, REPORTING
Will there be more reports available in this latest release of Ohio|Buys?
Yes, this release contains more robust reporting and analytics capabilities than were previously available, including the ability to analyze additional data fields such as release and permit information and revenue share. Also, users with the Reporting/Analytics role are now able to create and modify queries in Ohio|Buys (note: at this time, this profile is limited to DAS staff only).
Are the queries and analysis reports limited by scope/role?
Currently, an agency user has access to all the queries and analysis reports in Ohio|Buys. Over time, a Reporting Admin could restrict the visibility of a new query or analysis report if it contains confidential or sensitive data.

Will agencies have individuals with the Reporting profile, or is this going to only sit with DAS?
This role will be limited to DAS at go-live but will eventually be rolled out to other agencies.

ONESPAN SIGN

If the contact we add for signature wants to have another person in their company sign instead, can they forward that to another person and then have them sign in OneSpanSign instead?
There is no forwarding available in OneSpan Sign.

Can you add the order of signature requirement?
Yes, you can define the order of signatures in OneSpan Sign.

When adding recipients for OneSpan Sign can users input a generic name (i.e. do not know who will be signing the contract for the Supplier)?
No, users need to get a specific name from the Supplier. As part of the contract creation process, the contracting entity should work with the supplier to understand who will be signing the contract. Please refer to the OneSpan Sign training website for details: