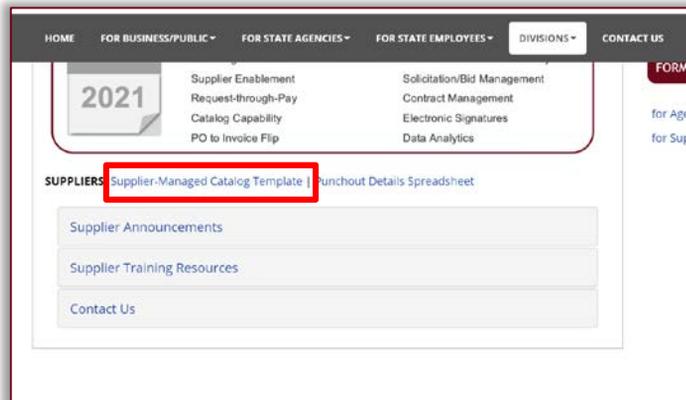


## Step-by-Step Instructions for Exporting the Catalog Import Template

Prior to creating a data import for a hosted catalog, the Supplier-Managed Catalog Template should be downloaded. This document contains information to guide you in completing the Excel file for the data import. For steps on how to download the Excel file used for the data import from Ohio|Buys, refer to Step 5.

- a) Download the Catalog Template from the State website at <https://das.ohio.gov/Divisions/General-Services/Procurement-Services/eProcurement#5223484-supplier>



- b) Use this as a reference as you complete the Excel file downloaded from Ohio|Buys for the data import. **If you have an active catalog in Ohio|Buys, do not use the Catalog Template to upload into Ohio|Buys.** It is important to use the Excel file downloaded directly from Ohio|Buys to complete the data import for your hosted catalog. If this is the first time you are loading your catalog into Ohio|Buys for a contract, you can upload the completed Catalog Template into Ohio|Buys.

### Hosted Catalog

A hosted catalog (in Excel spreadsheet format) is uploaded by the Catalog Analyst or Supplier into Ohio|Buys and maintained by the State and the Supplier. State users looking for items can access a hosted catalog in Ohio|Buys, add items to their cart, and complete the requisition and ordering process.

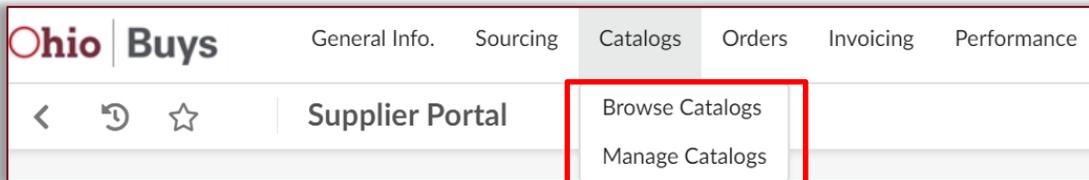
### Hosted Catalog Setup Checklist

The items below should be gathered prior to initiating the data import for the hosted catalog. This will help minimize import errors and missing information as State users shop within Ohio|Buys. Note: Not all of the items below are needed.

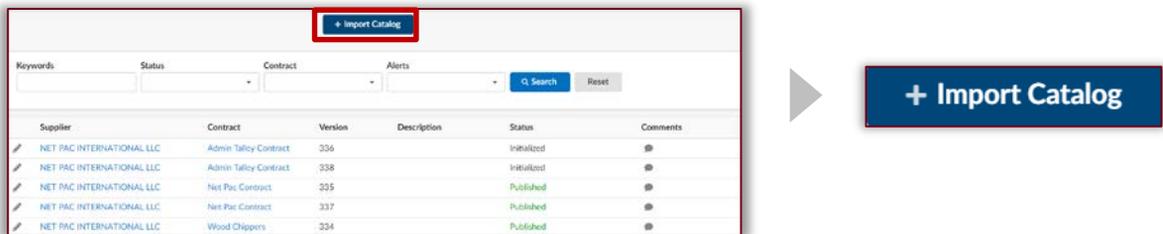
- Gather all pictures into a zip file and note each in the Catalog Template.
  - Gather all the Material Safety Data Sheets (MSDS) into a zip file and note each in the Catalog Template for each of the hazardous items in the import file.
  - Ensure the rest of the Catalog Template is complete, especially the mandatory fields.
- For more information on the template, refer to Step 4.

## Step-by-Step Instructions for Importing a Catalog as a Supplier

1 Navigate to <https://supplier-emarketplace.ohio.gov> to log in to Ohio Buys. From any page on the Ohio Buys solution, go to the Main Menu Navigation Bar, click on **Catalogs**, and select **Manage Catalogs**. Note, if this is a new catalog being imported into Ohio Buys please submit it to the enablement team for uploading.



2 On the Manage Catalogs page, click the **+ Import Catalog** button.



3 a) On the Import Catalog page, navigate to the box titled General Information and complete the following fields:

- Contract (i.e., the name of the contract associated with the catalog sheet)
- Version (i.e., the version of the catalog sheet). If this is the first import, then input "1". Ohio Buys will suggest the version number for every import that follows.
- If the catalog is related to a Direct Purchase contract, refer to the Request a Direct Purchase Catalog job aid.

The screenshot shows the General Information form on the Import Catalog page. The form fields are Contract, Version, and Import Type. The Contract field is a dropdown menu, and the Version field is a text input. The Import Type field is a dropdown menu with the selected value 'STD - Supplier catalog import'. There is also a checkbox for 'Ohio|Buys Direct Purchase Contract' with an information icon.

b) Once you completed the fields, click the **Save** button towards the top of the page.

## Step-by-Step Instructions for Importing a Catalog as a Supplier

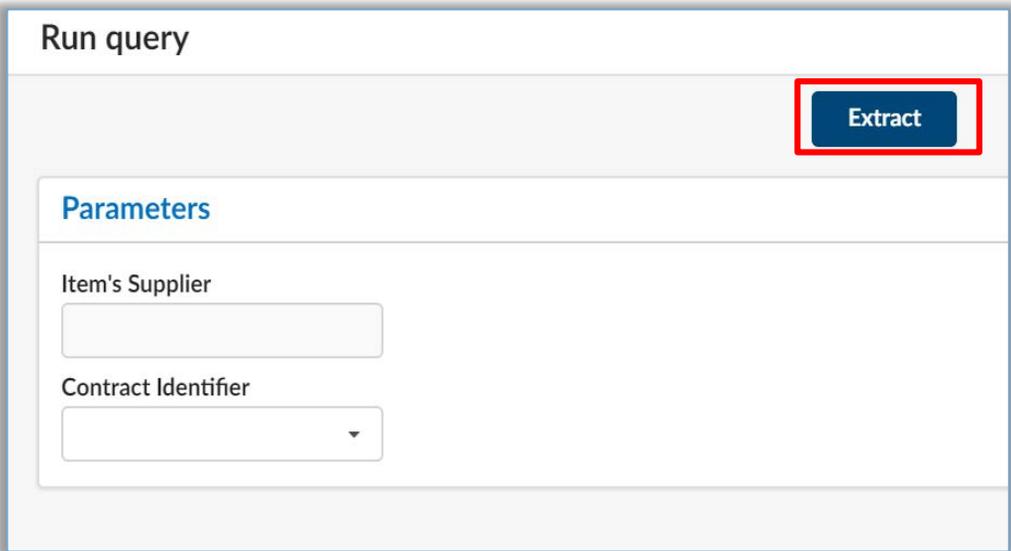
If you need to export your current catalog, follow the steps below:

- a) From the Import Catalog page, navigate to the box titled Extract Current Catalog and click the **Export Catalog** button to download the current catalog if your organization already has a catalog in Ohio Buys for the applicable contract.

A rectangular button with a light blue border and a light gray background, containing the text "Export Catalog" in a dark gray font.

- b) A pop-up titled Run Query appears. Select your contract from the **Contract Identifier** field and click the **Extract** button and ensure the .xlsx was successfully downloaded to your computer. Click the **Close ( X )** to close the pop up window.

4

A screenshot of a "Run query" pop-up window. The window has a title bar "Run query" and a blue "Extract" button in the top right corner, which is highlighted with a red rectangle. Below the button is a section titled "Parameters" containing two input fields: "Item's Supplier" (a text box) and "Contract Identifier" (a dropdown menu).

### Step-by-Step Instructions for Importing a Catalog as a Supplier

Find the downloaded .xlsx file for the current catalog on your computer, open the catalog sheet, make the necessary revisions, save the document, and close the document.

▲ If you have any questions regarding the columns in the .xlsx, refer to the Supplier-Managed Catalog Template. Use this as a reference as you complete the Excel file downloaded from Ohio|Buys for the data import. **If you have an active catalog in Ohio|Buys, do not use the Catalog Template to upload into Ohio|Buys.** It is important to use the Excel file downloaded directly from Ohio|Buys to complete the data import for your hosted catalog. If this is the first time you are loading your catalog into Ohio|Buys for a contract, you can upload the completed Catalog Template into Ohio|Buys.

- Instructions Tab (i.e., contains instructions for each column header; do not alter any column header; headers in red are mandatory)

A	B	C	D	E
PDT_CODE	PDT_LABEL	PDT_FAM_CODE	PDT_SUP_CODE_MANUF	PDT_SUP_LINK
<b>Product code</b> <small>(128 Character Max)</small>	<b>Product Name</b> <small>(192 Character Max)</small>	<b>UNSPSC Commodity Code</b> <small>(8 Character Max)</small>	<b>Manufacturer</b> <small>(128 Character Max)</small>	Link to manufacturer catalog <b>DO NOT POPULATE</b>
Enter one product code per row. For each product, take the contract number	Provide the name of the product. Ex. Dell Laptop Latitude E5430.	Enter the commodity code. Please consult the Commodity Code tab (contains UNSPSC	Provide the name of Manufacturer.	URL link to manufacturer catalog.

- Catalog Items Tab (i.e., contains the actual data to be imported into Ohio Buys)
  - There are 47 total columns of data, but only 13 columns of data are mandatory to complete or revise (e.g., product code, product label, item code, item label, supplier code, item contract reference, item validity begin date, item validity end date, item public price, item unit currency, item unit, manufacturer, and part number)
  - Ensure the other five Tabs (i.e., Instructions, Commodity Code, Unit of Measure, Shipping Mode, and Incoterm) have been deleted before you import the .xlsx into Ohio Buys

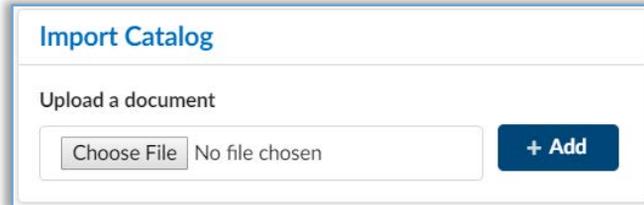
A	B	C	D	E
<b>PDT_CODE</b>	<b>PDT_LABEL</b>	<b>PDT_FAM_CODE</b>	<b>PDT_SUP_CODE_MANUF</b>	<b>PDT_SUP_LINK</b>

- Commodity Code Tab (i.e., contains a listing of commodities with a column for Title (e.g., live animals) and a column with the associated Code (e.g., 10100000). All commodity codes follow the UNSPSC codification. Refer to [www.unspsc.org](http://www.unspsc.org) to search for specific codes.

A	B
<b>Code</b>	<b>Title</b>
10000000	Live Plant and Animal Material and Accessories and Supplies
10100000	Live animals
10101500	Livestock
10101501	Cats

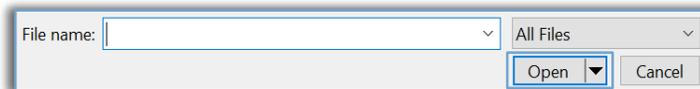
### Step-by-Step Instructions for Importing a Catalog as a Supplier

- a) On the Catalog Sheet page, click the **Choose File** button to import the newly revised or updated catalog sheet. Please note all image files and PDF documents must be imported along with the catalog, to avoid rejection or error.



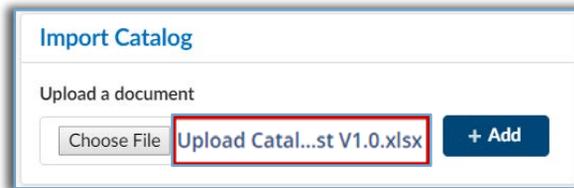
The screenshot shows a form titled "Import Catalog" with the sub-header "Upload a document". Below this, there is a "Choose File" button, a text field containing "No file chosen", and a blue "+ Add" button.

- b) Find the updated catalog sheet on your computer, select the file, and click the **Open** button.



The screenshot shows a file selection dialog box with a "File name:" field, a file type dropdown menu set to "All Files", and "Open" and "Cancel" buttons.

- c) Check to ensure the name of the updated catalog sheet appears next to the Choose File button.



The screenshot shows the "Import Catalog" form with the "Choose File" button now displaying the file name "Upload Catal...st V1.0.xlsx" next to it. The "+ Add" button is also visible.

- d) Click the **Add** button.



The screenshot shows a blue button with a white plus sign and the text "+ Add".

- e) Continue to repeat steps a) through d) until all image files and PDF documents are added.
- f) Towards the top of the Catalog page, click **Submit** to submit the catalog to the Catalog Analyst. You will receive email notifications regarding updates.



The screenshot shows a green button with the text "Submit".