

## Step-by-Step Instructions for Requesting a Direct Purchase Contract

**Direct Purchase Catalog:** A catalog hosted in Ohio|Buys for items that the Supplier does not currently have a contract with the State to provide. A Direct Purchase contract is a type of contract Suppliers can directly enter in to with State of Ohio Agencies, Boards, and Commissions in order to sell goods and services in Ohio|Buys. Typically, a direct purchase contract will include an open market pricelist and may not be the result of a solicitation process. Purchases made by State Agencies, Boards, and Commissions against these contracts are tracked against direct purchase and Controlling Board thresholds. See Ohio Administrative Policy PM-01 Purchasing Procedures for additional details regarding Controlling Board and Direct Purchase Thresholds and quoting guidance.

1

Log in to Ohio|Buys. From the Main Menu Navigation bar, click **Catalogs** and then select **Manage Catalogs** from the drop-down menu.

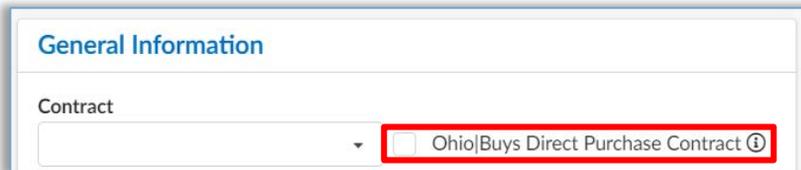
2

Click **+ Import Catalog**.

A blue rectangular button with white text that reads "+ Import Catalog".

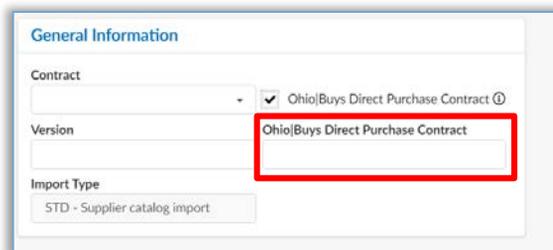
3

Click the **Ohio|Buys Direct Purchase Contract** checkbox.

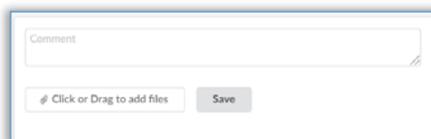
A screenshot of a form titled "General Information". It shows a "Contract" field with a dropdown arrow. The selected option is "Ohio|Buys Direct Purchase Contract", which is highlighted with a red rectangular box.

4

Input the **Ohio|Buys Direct Purchase Contract** name in the associated field. If your company does not already have a direct purchase contract with the State, leave this field blank and the State will populate this field for you. If your company does already have a direct purchase contract, input that number here.

A screenshot of a form titled "General Information". It shows a "Contract" dropdown menu with "Ohio|Buys Direct Purchase Contract" selected. Below it is a "Version" text input field containing "Ohio|Buys Direct Purchase Contract", which is highlighted with a red rectangular box. There is also an "Import Type" dropdown menu with "STD - Supplier catalog import" selected.

In the comments section below be sure to include any comments or relevant attachments for your request.

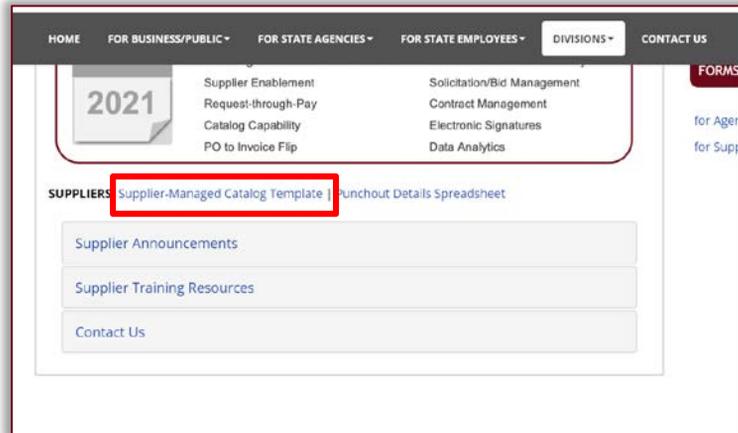
A screenshot of a comments section. It features a text input field labeled "Comment" with a small icon in the bottom right corner. Below the field are two buttons: one with a file icon and the text "@ Click or Drag to add files", and another labeled "Save".

When you have finished, click **Save**.

A blue rectangular button with a white document icon and the text "Save".

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- ▲ Download the template from the State website at <https://das.ohio.gov/Divisions/General-Services/Procurement-Services/eProcurement#5223484-supplier> to use as a reference document for the import or use as a template for the import.



- 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.

Export Catalog

- 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.

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 rectangular box. Below the button is a section titled 'Parameters'. It contains two input fields: 'Item's Supplier' with a text input box, and 'Contract Identifier' with a dropdown menu.

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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)

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- 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

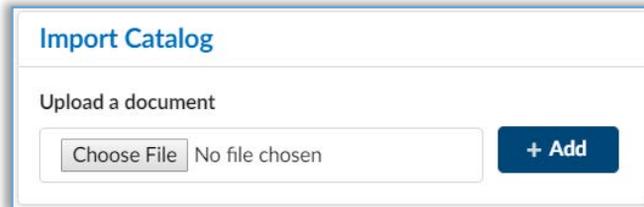
A	B	C	D	E
<b>PDT_CODE</b>	<b>PDT_LABEL</b>	<b>PDT_FAM_CODE</b>	<b>PDT_SUP_CODE_MANUF</b>	<b>PDT_SUP_LINK</b>

- 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

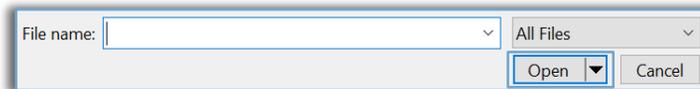
### Step-by-Step Instructions for Requesting a Direct Purchase Contract

- 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.



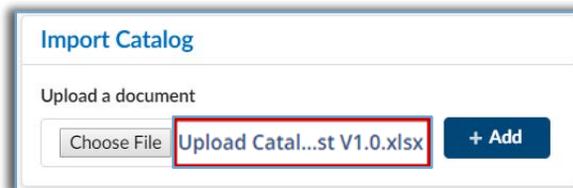
The screenshot shows a web form titled "Import Catalog". Under the heading "Upload a document", there is a "Choose File" button next to the text "No file chosen". To the right of this is a blue button with a white plus sign and the text "+ Add".

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



The screenshot shows a standard file selection dialog box. It has a "File name:" field, a file type dropdown menu set to "All Files", and two buttons at the bottom: "Open" and "Cancel".

- 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 again. The "Choose File" button is now highlighted with a red box, and the text "Upload Catal...st V1.0.xlsx" is visible next to it. The "+ Add" button is also visible to the right.

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



- 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. By clicking "Submit", you are agreeing to the following State Standard Terms and Conditions linked to at the top of the page.

