

# Ohio | Buys

Connecting Buyers and Suppliers

## **Bidder and Supplier Learner Guide Getting Started in Ohio|Buys**

**Published:** June 2020

**Audience:** Bidders and Suppliers

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# In This Document:

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**Overview:** Welcome to the State of Ohio's new eProcurement solution, Ohio|Buys. Ohio|Buys is the State of Ohio's online purchasing solution that empowers both government buyers and interested Bidders and Suppliers. Ohio|Buys leverages innovative technologies to increase efficiency, opportunities, and participation with businesses in Ohio. This guide provides you with step-by-step instructions for accessing and navigating Ohio|Buys, as well as managing your company profile.

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## Definition of Terms Used Throughout This Guide:

**Bidder:** A company which is not currently doing business with the State. Bidders can view and respond to solicitations.

**Supplier:** A company which is currently doing business with the State. Suppliers can view and respond to solicitations, receive and fulfill purchase orders, and create advanced shipping notifications.

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## Functionality Covered:

- 1) Registering as a New Bidder:**  
Suppliers who are not currently doing business with the State are still able to bid on solicitations posted on the Ohio|Buys public portal. In order to bid, a Bidder will need to create an OH|ID and complete a brief Bidder Registration Request.
- 2) Accessing Ohio|Buys as an Existing Supplier:** Suppliers who are currently doing business with the State do not need to re-register in order to access Ohio|Buys. Each Supplier user will need to have their own OH|ID and be listed as a contact with an assigned role.



# In This Document (continued):

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## Functionality Covered:

- 3) General Navigation:** Explains the structure and content of Ohio|Buys including the homepage, navigational icons, main menu, action buttons, functional tabs and other navigational options.
- 4) Manage Contacts:** Supplier Admins can add or delete contacts for their company within Ohio|Buys, as well as assign each contact a role aligning to the actions that they will be taking.
- 5) Select Commodities:** Supplier Admins can add or delete commodities in their company profile, indicating to State users which commodities they are capable of supplying. When a solicitation is created for a certain commodity, State users are able to quickly notify all Suppliers who have indicated that they are capable of supplying that commodity.
- 6) Accessing Additional Training Resources and Support:** Instructions for accessing additional training and support resources including videos, job aids and the Ohio Shared Services help desk team.



# REGISTERING AS A NEW BIDDER

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## Overview:

- What's Covered: How to register your company to access Ohio|Buys
- When to Reference This Section: If your company is not currently doing business with the State, and is not already registered to view and respond to solicitations.

### Step-by-Step Instructions for Registering as a New Bidder

▲ New Bidders should register and access Ohio|Buys prior to a bid's due date. Registering an Ohio|Buys account for your organization will ensure your company has access to, is familiar with, and is readily prepared to bid within Ohio|Buys when the time comes.

To begin this process, navigate to [supplier-marketplace.ohio.gov](https://supplier-marketplace.ohio.gov) and click **Log In via Supplier Portal**.



1

Ohio|Buys is the State of Ohio's online purchasing solution that empowers both government buyers and interested suppliers. Ohio|Buys leverages innovative technologies to increase efficiency, opportunities, and participation with businesses in Ohio.

Operated by the Ohio Department of Administrative Services, Ohio|Buys is currently available to a dozen State agencies. Ohio|Buys will continue to grow, expanding to include other State agencies, local governments, and higher education institutions.

Supplier Portal

Procurement Opportunities

Public RFx

Public Catalog

Get More Information:

[Bidder and Supplier Learner Guide](#)

[Procure.ohio.gov](https://procure.ohio.gov)



Sign in to Ohio|Buys with your OH|ID

With one OH|ID account, citizens or business can sign in to multiple State of Ohio government agencies systems more securely. Clicking on the button below will direct you to the Supplier Portal to log in or create an account.

Log In via Supplier Portal

## Step-by-Step Instructions for Registering as a New Bidder

2

If you do not currently have an OH|ID, click **Sign Up**, otherwise enter your login credentials.

▲ An OH|ID is a secure, single sign-on that provides users access to online services for multiple State of Ohio systems.

▲ A valid OH|ID is required for each Ohio|Buys user.

3

**Create Your OH|ID Account**

Profile Information Security Setup Confirmation

**OH|ID Profile Information**

Enter the information below to begin creating your OH|ID profile.

First Name \* Middle Initial Last Name \* Suffix

Email \* Email Confirmation \*

Work Phone Number \* Mobile Number

Date of Birth \* Last 4 of SSN

mm/dd/yyyy

Verification Question: \*  
What is forty six thousand and fifty eight as a number?

Enter your profile information, including your **First Name, Last Name, Email, Email Confirmation, Work Phone Number, Date of Birth, and Verification Question**. Note that all fields marked with an asterisk are required.

4

**Terms and Conditions**

In order to proceed with this request, you must agree to the following terms and conditions.

By clicking "I Agree" and creating an OH|ID Citizen, Business, or Workforce profile you consent to use electronic signatures with the State of Ohio and receive communications in electronic form.

If you use this site, you are responsible for maintaining the confidentiality of your OH|ID account(s) and password(s) and for restricting access to your computer, and you agree to accept responsibility for all activities that occur under your OH|ID account(s) or password(s). The Ohio Department of Administrative Services reserves the right to refuse service, terminate accounts, remove or edit content, or cancel transactions.

I Agree

Cancel Reset Next

Agree to the Terms and Conditions and then click **Next**.

## Step-by-Step Instructions for Registering as a New Bidder

Enter your desired **Username** and **Password**.

5

- ▲ Your **Username** must be at least 2 and no more than 64 characters in length. It can contain upper and lower case letters, numbers and the following special characters: . \_ - @
- ▲ Your **Password** must have at least 12 and no more than 31 characters in length and contain 1 character from each of the following categories:
  - Upper case letters (A-Z)
  - Lower case letter (a-z)
  - Numbers (0-9)
  - Special characters (!\$#.,%~^&\* \_-+=><(){}[]%";:V?)
- ▲ Your **Password** cannot include your first name, last name, username, or OH|ID

6

- a) Choose your **Password Recovery Methods**. We recommend setting up at least two methods to give you flexibility in resetting your own password.
  - b) Click **Create Account** to finish creating your OH|ID.
- ▲ You will receive a confirmation email once your OH|ID has been created.

7

Navigate back to [supplier-emarketplace.ohio.gov](https://supplier-emarketplace.ohio.gov) and click **Log In**. Now, enter your OH|ID credentials and click **Sign In**.

- ▲ The individual who submits their company's Bidder Registration Request will automatically become the Supplier Administrator for the company's account when the Bidder Registration Request is approved. It is recommended that the person whom the company wishes to be their Administrator completes the registration.

8

The Bidder Registration Request form is displayed. Complete the following fields:

- a) **Tax ID Number:** your unique tax identifier such as Taxpayer Identification Number (TIN)/Employer Identification Number (EIN) or Social Security Number (SSN).
- b) **Legal Name:** legal name as shown on your income tax return.
- c) **Secretary of State Charter/Entity Number:** please note if your organization is exempt, you can indicate this on this field.
- d) **Address Information,** including: **Address Line 1, State/Province, City, Zip Code,** and **County.** You are able to update the **Country** field as needed.
- e) **Commodities** (covered in detail on the next page)
- f) **Security Control** (similar to a CAPTCHA)

## Step-by-Step Instructions for Registering as a New Bidder

- ▲ **Commodities:** Select the commodities your organization provides. You will be notified of solicitations containing the commodities which you select here. Click the **Selector** icon to view the complete list of commodities and then use the **Hand** (🖱️) icon to indicate which commodities you would like to select. You can also search for commodities by typing directly into the **Commodities field** and selecting an option from the search results.

Commodities \*

26000000 - Power Generation and Distribution Machinery and Accessories

27000000 - Tools and General Machinery

30000000 - Structures and Building and Construction and Manufacturing Components and Supplies

31000000 - Manufacturing Components and Supplies

32000000 - Electronic Components and Supplies

39000000 - Electrical Systems and Lighting and Components and Accessories and Supplies

40000000 - Distribution and Conditioning Systems and Equipment and Components

See All

In addition to the aforementioned required fields, Bidders can also indicate:

- ▲ **EOD Designation** (EDGE, MBE, and/or VBE): If you select an EOD Designation, you must enter its corresponding **Certification ID**, **Effective Date**, and **Expiration Date**. Any EOD Designations will be reviewed and validated with the State; and Bidders have to complete the formal certification process in the Ohio Business Gateway at [business.ohio.gov](https://business.ohio.gov) beforehand in order for their information to be validated.

EOD Designation ⓘ

MBE x

MBE Certification ID \*

MBE Effective Date \*

MBE Expiration Date \*

After you have completed the required fields and added any supplementary information such as any EOD Designations and/or commodities. Click **Register** at the top of the page to submit your Bidder Registration Request.

Register

- ▲ You will receive an email notification when the State of Ohio has reviewed and taken action on your request. If your request is approved, you will be able to click the confirmation link from the body of the email you received to log in and access Ohio|Buys.
- ▲ Once the Supplier Administrator logs in to their company's account, they will be able to add additional users to their account on the Contacts tab of their Supplier Profile. Please refer to the [Manage Contacts](#) section in this guide for details.

You have now completed the guide for this section. After your Bidder Registration Request is approved, please refer to the [General Navigation](#) section in the guide for details on how to navigate Ohio|Buys.

# ACCESSING OHIO|BUYS AS AN EXISTING SUPPLIER

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## Overview:

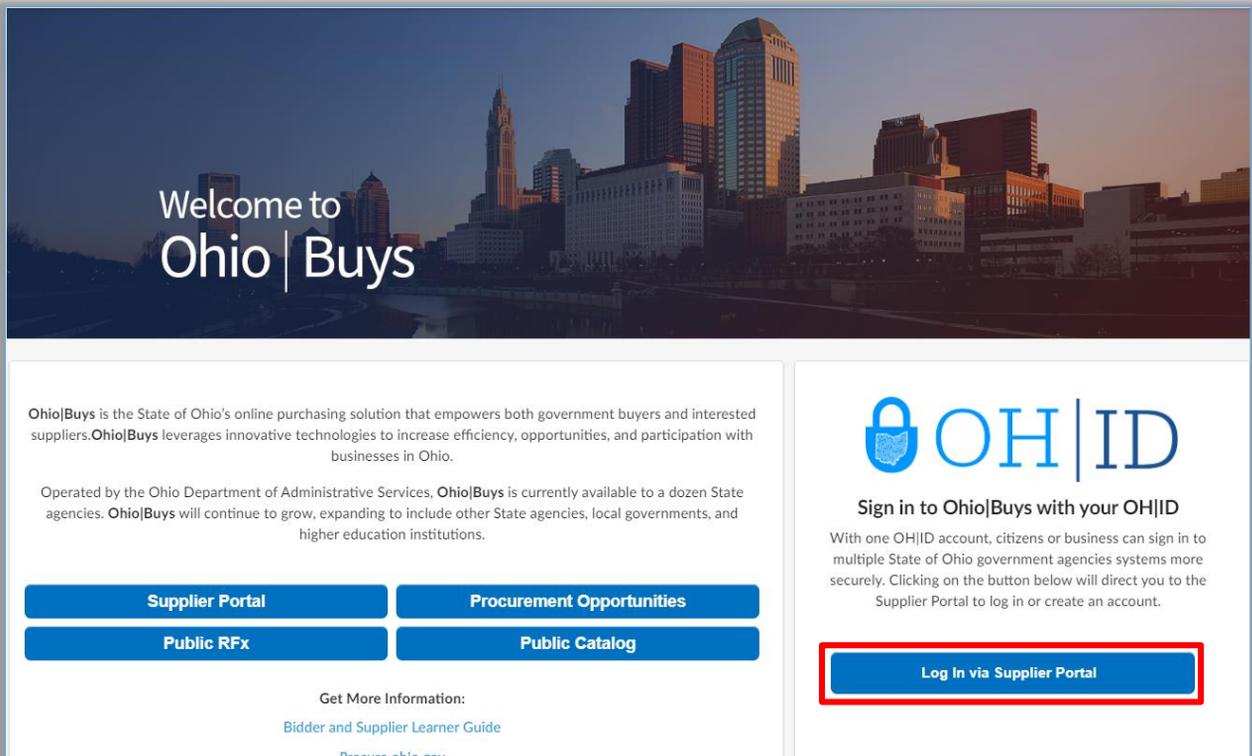
- What's Covered: How to access Ohio|Buys as an existing Supplier
- When to Reference This Section: If your company is currently doing business with the State, and you are a new or existing user for your company.

## Step-by-Step Instructions for Accessing Ohio|Buys as an Existing Supplier

- ▲ An existing Supplier is a business or organization that is fully registered to do business with the State, while a Bidder is a business or organization that wants to respond to an opportunity to do business with the State and is not currently a fully-registered State Supplier. New Bidders need to complete the Bidder Registration process in order to log in to Ohio|Buys. Please refer to [Registering as a New Bidder](#) in this guide for details.
- ▲ If you are a Requisite Program Supplier, please refer to the [Requisite Program Supplier Log In](#) job aid for details on how to log in.

To begin this process, navigate to [supplier-marketplace.ohio.gov](http://supplier-marketplace.ohio.gov) and click **Log In via Supplier Portal**.

1



Welcome to Ohio | Buys

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Supplier Portal Procurement Opportunities  
Public RFx Public Catalog

Get More Information:  
[Bidder and Supplier Learner Guide](#)  
[Procure.ohio.gov](http://Procure.ohio.gov)

OH|ID  
Sign in to Ohio|Buys with your OH|ID  
With one OH|ID account, citizens or business can sign in to multiple State of Ohio government agencies systems more securely. Clicking on the button below will direct you to the Supplier Portal to log in or create an account.

Log In via Supplier Portal

## Step-by-Step Instructions for Accessing Ohio|Buys as an Existing Supplier

If you do not currently have an OH|ID, click **Sign Up**, otherwise enter your login credentials (email address and password) and click **Log In**.

- ▲ An OH|ID is a secure, single sign-on that provides users access to online services for multiple State of Ohio systems.
- ▲ A valid OH|ID is required for each Ohio|Buys user.

2

The screenshot shows the 'Supplier Portal' login page. The login form is highlighted with a red box and includes the following elements:

- OH|ID logo and text: "OH|ID provides users with a more secure and private experience during online interactions with State of Ohio programs."
- Username input field
- Password input field
- Log In button
- Links: "Forgot username/password?" and "Don't have an account yet? Sign Up"

Other visible elements on the page include: "An Official Site of Ohio.gov", "Need assistance? Help Center", "How do I access the Supplier Portal?" section with a "Create New Account" button, and a footer with "Get more information" and navigation links.

Upon logging in, you will be navigated to the Ohio|Buys homepage. For details navigating Ohio|Buys and managing your contacts and profile, please refer to [General Navigation](#), [Managing Contacts](#) and [Selecting Commodities](#) in this guide for details.

3

The screenshot displays the Ohio|Buys homepage for a logged-in user (EMILY P.). The page features a navigation bar with tabs for "General Info.", "Sourcing", "Catalogs", "Orders", "Invoicing", and "Performance". Below the navigation bar is a search bar and a "Company Profile" dropdown menu.

The main content area is divided into three sections:

- Company Profile:** Includes icons for "Company Profile", "Import Catalog", and "Orders".
- Announcements:** Contains a message: "Ohio|Buys is live for bidders and suppliers! Formerly known as Ohio eProcurement/eMarketplace, suppliers and bidders can use Ohio|Buys for many procurement activities such as:" followed by a list:
  - Participate in solicitations
  - Manage company contact information
  - Offer goods and services through a catalog
  - Manage orders and invoices
- My Purchase Orders:** Shows a table with columns for "ID" and "Buyer Co". A row is visible with the ID "PO00000676" and the name "Robinson".

## Step-by-Step Instructions for Accessing Ohio|Buys as an Existing Supplier

- ▲ Prior to Ohio|Buys, Supplier users accessed their company information via the Ohio Supplier Portal using their OH|ID and password. These existing users have been automatically created in Ohio|Buys and can access Ohio|Buys using their same OH|ID and password. See Step-by-Step instructions on page 10.
- ▲ However, if your company had not previously created and associated users via the Ohio Supplier Portal, you will need to create a Supplier Admin user on the Ohio Supplier Portal. That user will then be automatically created real-time in Ohio|Buys.

To begin this process, navigate to [supplier.ohio.gov](http://supplier.ohio.gov) and click **Sign Up**.

Read the message that pops up and click **Continue**.



1

Complete the profile information on the next page. Note that all fields marked with an asterisk are required. Read the **Terms and Conditions**, click **I Agree**, and click **Next** to proceed to the Security Setup page.

A screenshot of the 'OH|ID Profile Information' form. The form contains several input fields: First Name \*, Middle Initial, Last Name \*, Suffix, Email \*, Email Confirmation \*, Work Phone Number \*, Mobile Number, Date of Birth \*, Last 4 of SSN, and a Verification Question: "doctoring" has how many letters?. Below the form is a 'Terms and Conditions' section with a paragraph of text and a checkbox labeled 'I Agree'. The 'I Agree' checkbox is highlighted with a red box. At the bottom of the form are three buttons: 'Cancel', 'Reset', and 'Next'. The 'Next' button is highlighted with a red box.

## Step-by-Step Instructions for Accessing Ohio|Buys as an Existing Supplier

Type in your chosen username and a password. You must input at least one password recovery method. We recommend setting up all three to give you maximum flexibility in resetting your password. Click **Create Account** to complete the process. You can now return to the Supplier Portal homepage [supplier.ohio.gov](http://supplier.ohio.gov) to login using your new account.

**Create OH|ID Username and Password**  
Provide username and password information to complete your profile.

Username  
Password  
Confirm New Password

**Username Guidelines:**

- Must have at least 6 and no more than 64 characters in length
- Username cannot start or end in a special character
- Username cannot contain only numbers
- The following are valid characters that can be used in an OH|ID username:
  - Upper case letters (A-Z)
  - Lower case letter (a-z)
  - Numbers (0-9)
  - Select special characters (. \_ - @) Note: No other special characters are permitted

**Password Guidelines:**

- Must have at least 8 and no more than 30 characters in length
- Must contain 1 character from each of the following categories:
  - Upper case letters (A-Z)
  - Lower case letter (a-z)
  - Numbers (0-9)
  - Special characters (!\$%&'\*~^&\*\_+<=>[]{}~\|/?)
- Password cannot include your first name, last name, username, or OH|ID
  - Example: If your name or username is John Smith, your password cannot contain 'John' or 'Smith'

**Choose Password Recovery Methods**  
You can select more than one method.

**Email**  
You will receive a temporary PIN on your email address to reset the forgotten password.

**Mobile Number**  
You will receive a temporary PIN on your mobile number to reset the forgotten password.

**Security Questions**  
Security Questions can be used to reset the forgotten password.

Cancel Back **Create Account**

2

▲ Once logged in you will need to associate a business (your company) with your account.

On the homepage, you will see three options for associating a contact with your organization. Select **Find My Business** to look up an existing supplier.

**Thank you for creating an account with OH|ID. To continue, please choose one of the options below.**

**Existing Supplier**  
You or your company has previously submitted an invoice for payment.  
You or your company is a registered supplier or provider and has existing supplier portal users.  
You want to be added as a Supplier Portal user for your company.  
**Find My Business**

**New Supplier**  
This is the first time that you or your company is conducting business with the State.  
The State has requested that your company register as a supplier.  
If you have submitted a registration and received an email from the State of Ohio requesting more information or you saved your registration for later.  
**Start Registration**

**Ohio Bidders**  
Your company would like to be notified about opportunities to do business with the State.  
Your company would like to respond to solicitations.  
**Ohio | Buys**

## Step-by-Step Instructions for Accessing Ohio|Buys as an Existing Supplier

To find a company, you can either search by Business Name or Tax ID. Enter a search term and then click **Search**. The numbers and arrows at the bottom of the screen allow moving between multiple screens of results. Click **Request Access** next to the desired company.

Supplier Portal

Need assistance?  
Help Center

### Find My Company

Enter your company's name or Tax ID to see if it is already registered with the State.  
Do not use dashes(-) when searching using your company's Tax ID, only use numbers.

Acme

Showing 4 of 30 Results

ACME STEAK COMPANY INC	Request Access	ACME MACHINE AUTOMATICS INC	Request Access
ACME COMPANY	Request Access	ACME FRESH MARKET CATERING	Request Access

1 2 3 4 5 ... 8

3

- ▲ If a Supplier Admin is already associated with the company, an email is sent to the existing Supplier Admin to approve access.
- ▲ However, if there is no current Supplier Admin associated with the company, you will receive an error message with a link to submit a form to request to become an administrator for the company. Refer to the next page for details.

## Step-by-Step Instructions for Accessing Ohio|Buys as an Existing Supplier

- ▲ You can also access the Supplier Portal Administrator form by clicking on **Forms** in the menu bar and selecting **Supplier Portal Administrator** from the displayed list. Click **Download** and the form will open in a separate window.
- ▲ Note that you would also follow this process if there was an existing Supplier Admin for your company, but that person is no longer with your company and you need to request that a different user be given the Supplier Admin role.

The screenshot shows the Ohio|Buys Supplier Portal interface. At the top right, it says "An Official Site of Ohio.gov" and "Need assistance? Help Center". The navigation menu includes "Dashboard", "Invoices", "Purchase Orders", "Payments", "Bid Center", "Supplier Actions", and "Forms" (which is highlighted with a red box). Below the menu, the "Supplier Forms" section contains a message: "If you have an existing supplier record, you only need to fill out the 'Supplier Administrator Form' to have your OHID associated with your existing record. You do not need to fill out the other forms unless you would like to make changes to your existing record." There is a section for "PDF Forms - Help and Information" with instructions on using Adobe Reader. A list of forms is shown under "TurningLeaf Enterprises", with "Supplier Portal Administrator" highlighted by a red box. Below this list, the "Supplier Portal Administrator" form is available for download, with the "Download" button also highlighted by a red box. An "Upload" button is also visible.

## Step-by-Step Instructions for Accessing Ohio|Buys as an Existing Supplier

Complete the form and then save a PDF of the completed form to your hard drive, noting the folder where you save the file. *Note: Handwritten signatures are not required for forms submitted digitally on the Ohio Supplier Portal website.*

The screenshot shows the 'Supplier Portal Administrator' form from the Ohio Office of Budget and Management. At the top, it includes the Ohio logo and the text 'Office of Budget and Management'. The form title is 'Supplier Portal Administrator'. Below the title, a note states: 'To assure all information is captured, please save this form using Adobe Acrobat Reader (click [HERE](#) for free download) or Adobe Acrobat Pro ONLY. Some data fields and functionality are not fully supported by third-party editing software such as PDF-Xchange.' There is a field for 'Employer Identification Number (EIN) or Social Security Number (SSN):' with a grid of 12 boxes and a red note '(no dashes or spaces)'. The form is divided into sections: 'Section 1 - Provider / Supplier Information' and 'Section 2 - Current Address on file (Validation)'. Under Section 1, there are two text input fields: 'Legal Business or Individual Name:' and 'Business Name, Trade Name, Doing Business As:' with a red note '(if different than above)'.

5

Return to the same form selection from the list on the Forms page and click **Upload**. On the menu that appears, select the **Paperclip** icon, navigate to the location where you saved the form and then select the form. Click on **Submit files** to send the form to Ohio Shared Services (OSS) for review and processing. You will be notified via email after OSS has reviewed and processed the form.

The screenshot shows the Ohio|Buys interface for a user named 'TurningLeaf Enterprises'. A modal window titled 'Supplier Portal Administrator' is open, prompting the user to 'Please attach your Supplier Portal Administrator Form. The file should be a PDF.' The modal has a 'Select file' button with a paperclip icon, a 'Cancel' button, and a 'Submit files' button. Below the modal, the 'Supplier Portal Administrator' section shows a list of files. One file, 'SupplierPortalAdministrator\_OBM-5657A\_3-21-19.pdf | 269 KB', is listed with a 'Download' button. To the right, there is an 'Upload' button highlighted with a red box. At the bottom, there is a note: 'Use this form to request to change the administrator of your account. You will receive an email notification when your form has been processed - completion of your request may take up to three days.'

You have now completed the guide for this section. Once you have logged in to Ohio|Buys, please refer to the [General Navigation](#) section in the guide for details on how to navigate Ohio|Buys.

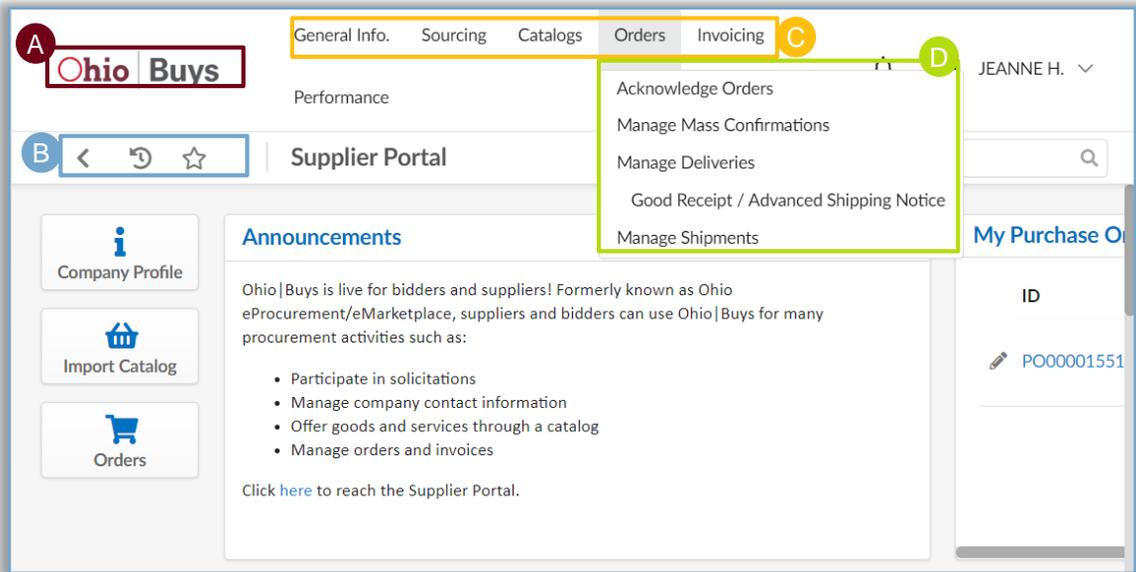
# GENERAL NAVIGATION

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## Overview:

- What's Covered: Explains the structure and content of Ohio|Buys.
- When to Reference This Section: To become familiar with navigating Ohio|Buys.

## Overview of Navigation Options (1/2)



A

Clicking on the **Ohio|Buys** logo at any time will take you back to the homepage.



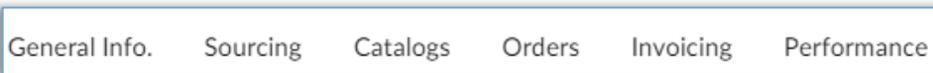
B

Using the **Navigational Icons** will take you back a page ( < ), let you view your history ( ↻ ), or save the current page as a favorite ( ☆ ).



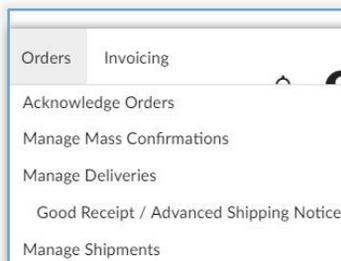
C

The **Main Menu Navigation Bar** at the top of the page includes options available and applicable to you. Click on a main menu option (e.g., General Info., Sourcing, Catalogs, Orders, Invoicing, Performance) to display its associated drop-down menu.



D

Selecting any option within a **Drop-Down Menu** will navigate you to the corresponding page.



## Overview of Navigation Options (2/2)

Ohio Buys

General Info. Sourcing Catalogs Orders Invoicing

Performance

Supplier Portal

Company Profile

Import Catalog

Orders

Announcements

Ohio|Buys is live for bidders and suppliers! Formerly known as Ohio eProcurement/eMarketplace, suppliers and bidders can use Ohio|Buys for many procurement activities such as:

- Participate in solicitations
- Manage company contact information
- Offer goods and services through a catalog
- Manage orders and invoices

Click [here](#) to reach the Supplier Portal.

JEANNE H. ▾

- My Profile
- My pending validations
- My Scheduled Tasks
- Logout

ID

PO00001551

Clicking on your **User Name** displays the following options:

- **My Profile:** Displays your account profile, and enables you to update your personal information default settings and preferences.
- **My pending validations:** Contains anything assigned to you for action, such as acknowledging orders. In addition, you will receive an email whenever you have been invited to participate in a solicitation or have received a new order.
- **My Scheduled Tasks:** Displays open scheduled tasks assigned to you, such as tasks from an improvement plan.
- **Logout:** It is recommended that you do not use the Logout option to log out of Ohio|Buys. If you would like to log out, close your browser window. In addition, you will also be logged out after 20 minutes of inactivity.

### E Supplier Locations:

- ▲ If you are listed as a contact for multiple Supplier locations, you will see a drop-down menu to the right of your name which will allow you to toggle between the various Supplier locations with which you are associated. Hovering over a location will reveal the details for that particular location such as the address.
- ▲ Please note, contacts, orders, and solicitations are managed at the location level, not the Supplier level, so it is recommended you routinely verify activity in all of the locations to which you have access.

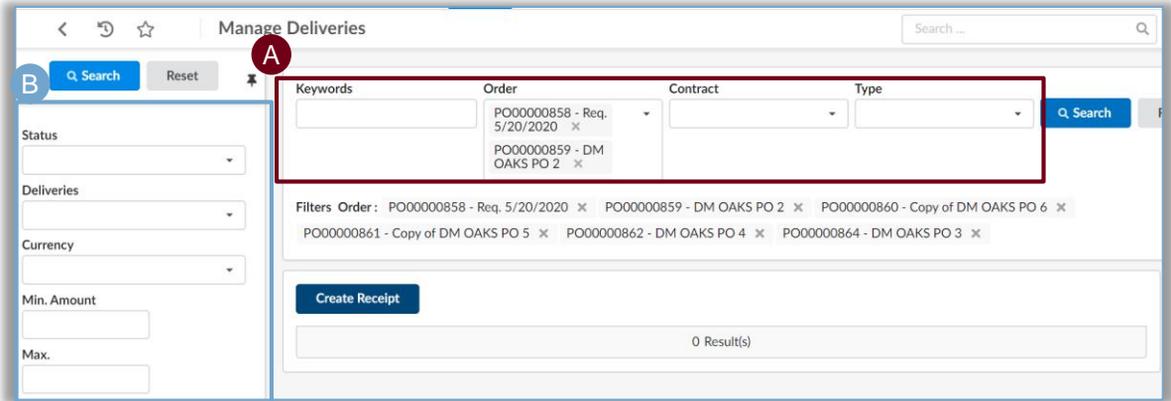
BILL N. ▾ (CINCINNATI ASSOCIATION FOR THE BLIND) ▾

Search

CINCINNATI ASSOCIATION FOR THE BLIND

CINCINNATI ASSOCIATION FOR THE BLIND 2045 GILBERT AVE 45202 CINCINNATI UNITED STATES 310538511

## Overview of Search Functionality



▲ Users can search for documents on any of the *Browse* pages.

A ▲ When searching within Ohio|Buys, you will be able to search for multiple values at once. For example, searching for more than one order at a time.

▲ The advanced search pane that is indicated by the funnel (  ) icon allows the user to search based on additional criteria related to the document.

B

## Page Navigation Overview: Purchase Order Example

The screenshot shows the Ohio Buys interface for a Purchase Order. Callout A points to the page title in the breadcrumb navigation: "PO: PO00002034 - Sticky Notes for Fisher Rd.-CINCINNATI ASSOCIATION FOR THE BLIND - CINCINNATI ASSOCIATION FOR THE BLIND". Callout B points to a row of action buttons: "Acknowledge" (green), "Create an advanced shipping notice" (light blue), "Create Invoice" (light blue), and "Print PO" (dark blue). Callout C points to the "Purchase Order" functional tab in the left-hand navigation menu.

The Page Name is the name of the page you are on and it is displayed in the top left corner of the page.

PO: PO00002034 - Sticky Notes for Fisher Rd.-CINCINNATI ASSOCIATION FOR THE BLIND - CINCINNATI ASSOCIATION FOR THE BLIND

The wording of **Action Buttons** will vary by user role and the task being completed, and are sometimes unavailable to certain users on specific pages. Use these buttons to take action on a particular task:

- *Green Buttons*: Submitting an action.
- *Red Buttons*: Canceling or rejecting an action.
- *Light Blue Buttons*: Saving an action.
- *Dark Blue Buttons*: Performing an optional or additional action.

Acknowledge

The **Functional Tabs** are located on the left side of a page. Major tasks are organized by functional tabs. Clicking on these enable you to see additional information related to a specific task (e.g. Purchase Order).

i Purchase Order

You have now completed the guide for this section. Now that you are familiar with navigating with navigating Ohio|Buys, refer to the [Managing Contacts](#) section of this guide.

# MANAGING CONTACTS

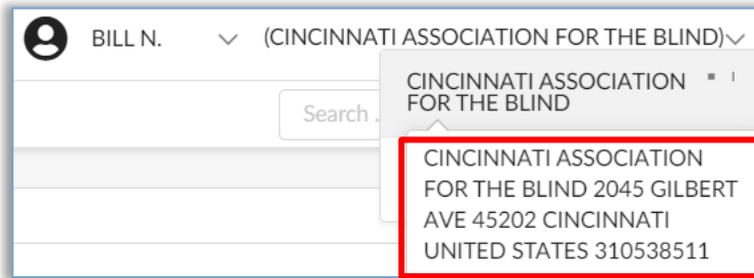
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## Overview:

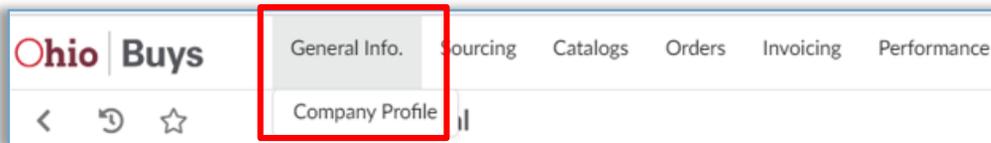
- What's Covered: Adding or deleting company contacts, as well as assigning each contact a role aligning to the actions that they will be taking in Ohio|Buys.
- When to Reference This Section: When you want manage contacts for your company.

### Step-by-Step Instructions for Managing Contacts as a Bidder or Supplier

- ▲ Please note, contacts are managed at the location (i.e., address) level, not the Supplier level. This means that a contact needs to be associated with each location in order to access information and perform actions for that location. If you add or remove a contact for a particular location and would also like to make this change at another location, go to the Company Profile for the other location and repeat the steps contained in this guide. To toggle between locations, click on your organization's name in the top right hand side of page and select the location you like to view. The locations associated with your organization are managed within the Supplier Portal: <https://supplier.ohio.gov>.

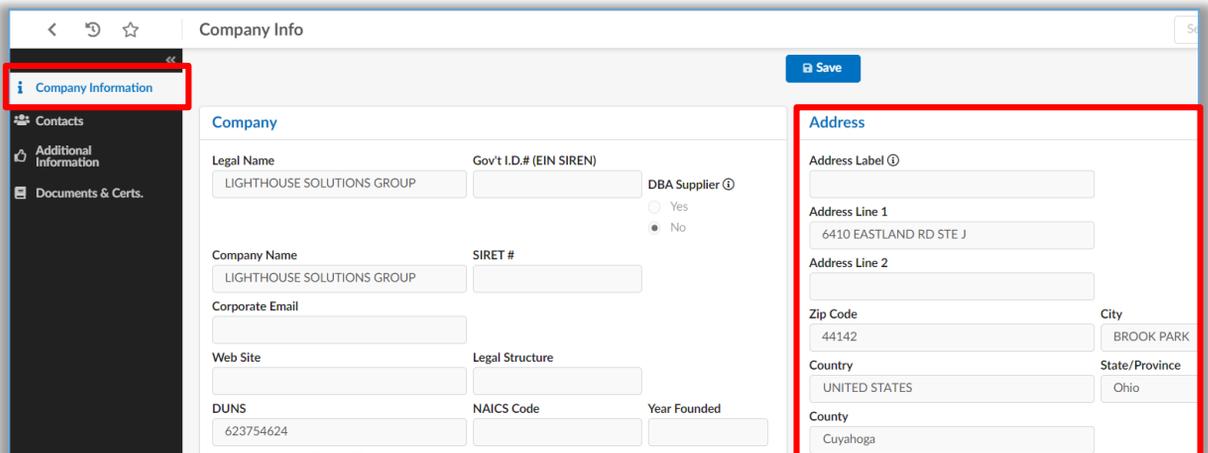


Log in to Ohio|Buys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.



Navigate to the **Company Information** tab where your company's information is displayed.

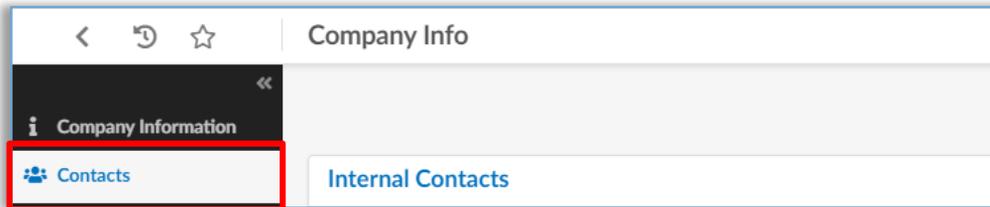
- ▲ On the right side of the page, you can see the address associated with the location you are viewing. To view a different location, click on your organization's name in the upper right-hand corner of the screen and select an option from the displayed drop-down menu.



## Step-by-Step Instructions for Managing Contacts as a Bidder or Supplier

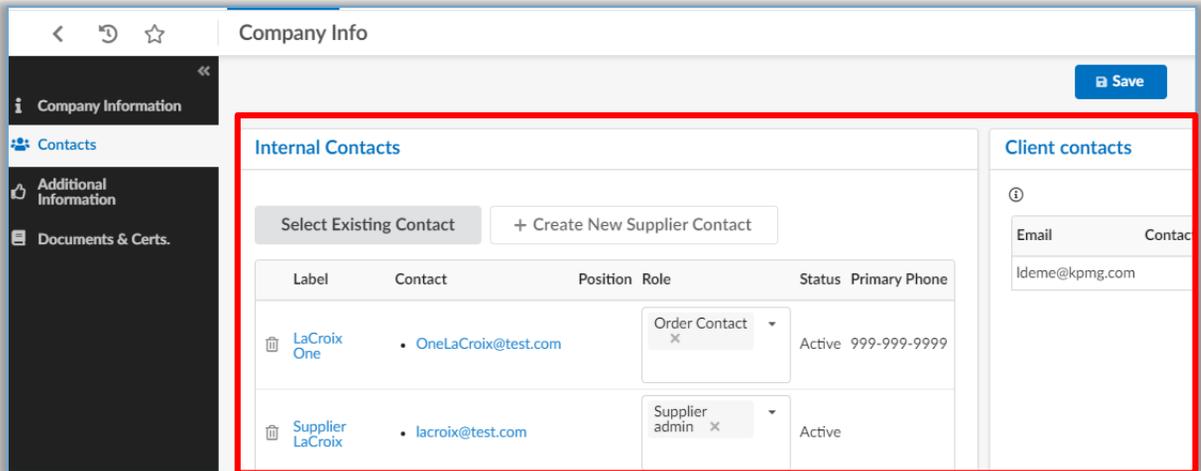
Navigate to the **Contacts** tab.

2



From the Contacts page, you are able to revise (i.e., add, edit, or delete) contacts for your company (from the box titled Internal Contacts) and review contacts for the State of Ohio (from the box titled Client Contacts).

3



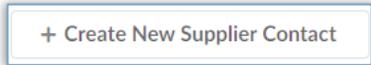
▲ Users should contact their Supplier Admin if they feel that roles or locations are missing.

### Step-by-Step Instructions for Managing Contacts as a Bidder or Supplier

While on the Contacts tab, navigate to the box titled Internal Contacts to complete the following contact management options for your company:

a) Add a New Company Contact

- 1) Toward the top of the Internal Contacts box, click the **Create New Supplier Contact** button to add a new company contact.



- 2) Within the pop-up titled Supplier Contact Management, complete the mandatory and (if applicable) optional information in the Identity box (e.g., last name, first name, email, phone) and the Address box.

- 3) Click the **Save & Close** button.

- 4) Although you have added a company contact, they must have an OH|ID in order to access OhioBuys. In addition, the email address entered for the new contact must match the email address the contact used to set up their OH|ID.

▲ OH|IDs can be created by navigating to <https://supplier.ohio.gov> and clicking **Sign Up**.

- 5) A critical step in setting up a contact is role assignment. Click the **Role** field and select a role or roles from the drop-down list. If contacts are not assigned a profile, they will not be able to take actions in the system (e.g., review and acknowledge orders, respond to quick quotes, etc.). If unsure, select **Order Contact** as the default role.

▲ Assign the **Contract Contact** role to any user who will need to be notified about a quick quote solicitation. In order for the State to notify them through OhioBuys, the user must have this role.

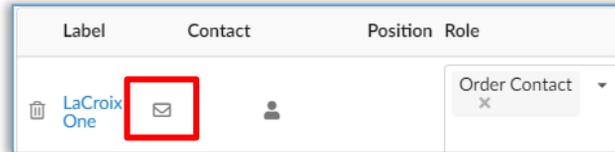
Label	Contact	Position	Role	Status	Primary Phone
LaCroix One			<div style="border: 2px solid red; padding: 2px;">                       ▾                      Contract contact                      Order Contact                      Supplier admin                 </div>	Active	999-999-9999
Supplier LaCroix	• lacroix@test.com			Active	

- 6) Click **Save**.



### Step-by-Step Instructions for Managing Contacts as a Bidder or Supplier

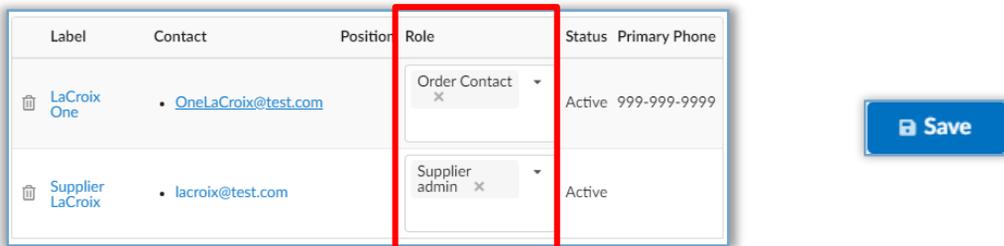
7) Click the **Mail** icon to send the user an invitation to log in. The user who has been added as a contact must then create an OH|ID with the email address that was entered in Ohio|Buys.



▲ Once you have added a contact to a particular location, you can add that contact to another location by toggling over to the desired location, navigating to the Contacts tab of your company profile, and clicking the Select Existing Contact button.

#### b) Change a User Role :

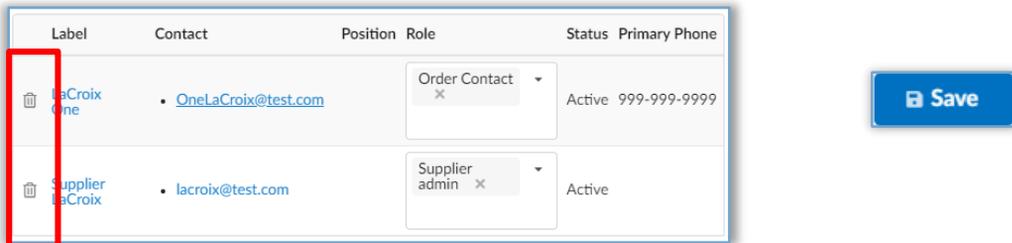
- To change a user's role, navigate to the column for **Role**, click the drop-down menu, and select the applicable role(s). The available roles are Supplier Admin, Order Contact, and Contract Contact. After you have made the necessary updates, click **Save**.



- You should assign users the Order Contact role if they are responsible for order processing. Users assigned this role will be shown to State buyers as Supplier contacts when they are submitting orders.
- It is also recommended that each company's account have at least two Supplier Admins. Supplier Admins have the ability to manage contact and company profile information (e.g. select commodities which they can provide) in Ohio|Buys.

## Step-by-Step Instructions for Managing Contacts as a Bidder or Supplier

b) Remove a Company Contact: Find the company contact you want to remove and click on the **Trash Can** (  ) icon next to their name. Once completed, click **Save**.



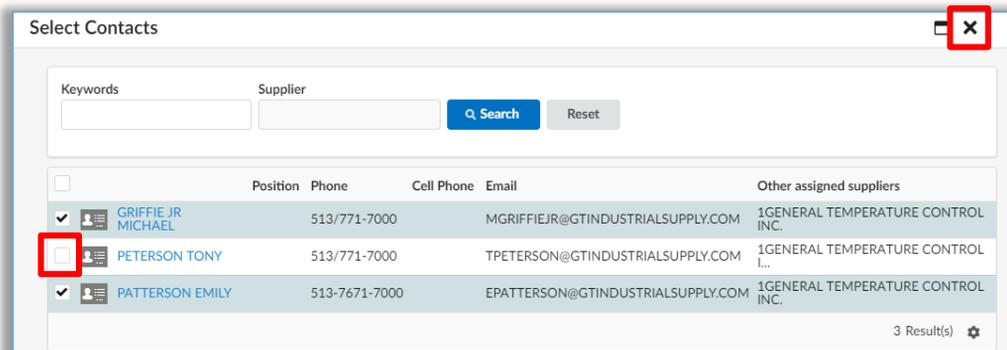
Label	Contact	Position	Role	Status	Primary Phone
 laCroix One	• <a href="mailto:OneLaCroix@test.com">OneLaCroix@test.com</a>		Order Contact ×	Active	999-999-9999
 Supplier laCroix	• <a href="mailto:lacroix@test.com">lacroix@test.com</a>		Supplier admin ×	Active	

c) Add an Existing Company Contact In OhioBuys:

- 1) Toward the top of the Internal Contacts box, click the **Select Existing Contact** button to find and add a company contact that is already listed as a contact for another location.

Select Existing Contact

- 2) Within the pop-up titled Select Contacts, either utilize the search functionalities toward the top or scroll through the automatically generated list of company contacts associated with your company. Once you find the company contact you want to add, click the **Checkbox** (  ) icon next to the individual's name.



Select Contacts

Keywords:  Supplier:

<input type="checkbox"/>		Position	Phone	Cell Phone	Email	Other assigned suppliers
<input checked="" type="checkbox"/>	 GRIFFIE JR MICHAEL		513/771-7000		MGRIFIEJR@GTINDUSTRIALSUPPLY.COM	1GENERAL TEMPERATURE CONTROL INC.
<input type="checkbox"/>	 PETERSON TONY		513/771-7000		TPETERSON@GTINDUSTRIALSUPPLY.COM	1GENERAL TEMPERATURE CONTROL L...
<input checked="" type="checkbox"/>	 PATTERSON EMILY		513-7671-7000		EPATTERSON@GTINDUSTRIALSUPPLY.COM	1GENERAL TEMPERATURE CONTROL INC.

3 Result(s) 

- 3) Once you have clicked the Checkbox icon next to each company contact you want to add, navigate to the top of the pop-up and click the **Close (X)** icon. The contact is now listed within the Internal Contacts box on the Contacts page. Once the contact has been added, select the applicable role(s) for the contact and click **Save**.

You have now completed the guide for this section. For next steps in managing your company profile please refer to the [Selecting Commodities](#) section in this guide.

# SELECTING COMMODITIES

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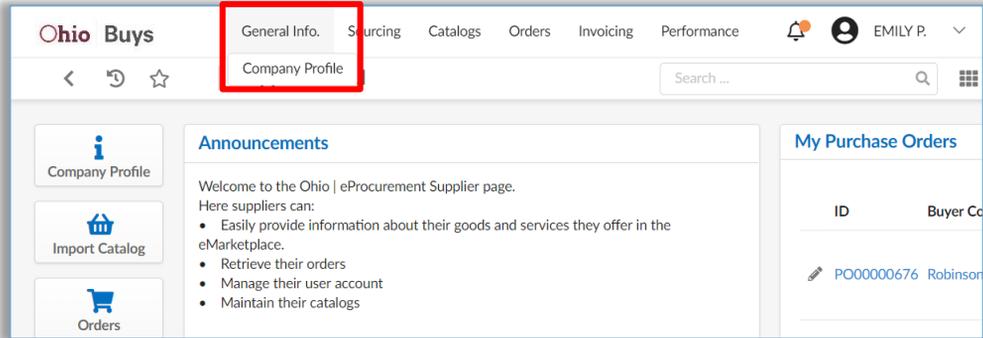
## Overview:

- What's Covered: Adding or deleting the commodities which your company can supply.
- When to Reference This Section: When you want to update the list of commodities your company can supply. Selecting commodities in Ohio|Buys allows your company to receive automated notifications for relevant solicitations.

### Step-by-Step Instructions for Selecting Commodities as a Bidder/Supplier

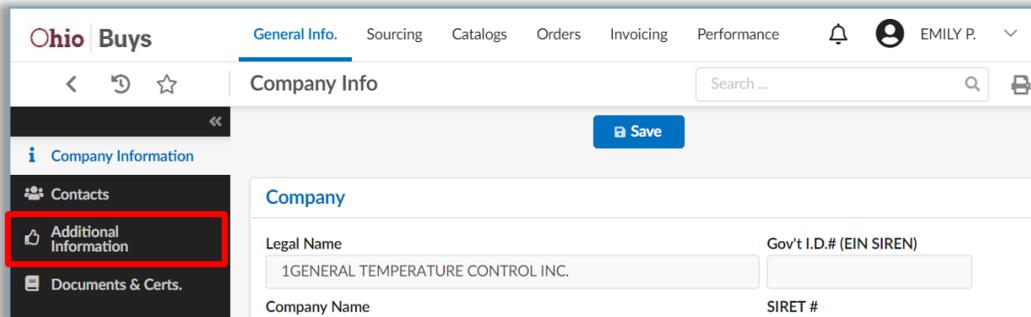
Log in to Ohio|Buys. From the Main Menu Navigation Bar, click on **General Info.**, and then select **Company Profile** from the associated drop-down menu.

1



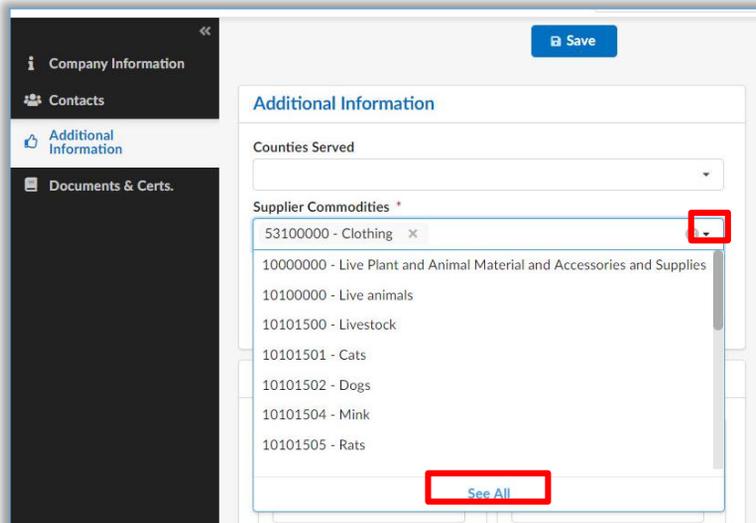
Your company's profile is displayed. Navigate to the **Additional Information** tab.

2



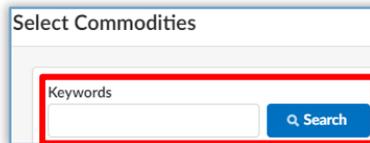
On this tab, you can update the commodities your organization offers. Click the **Selector (▼)** icon to begin searching for commodities and then select **See All**.

3



### Step-by-Step Instructions for Selecting Commodities as a Bidder/Supplier

You are able to enter search terms in the **Keywords** field and then click **Search**.

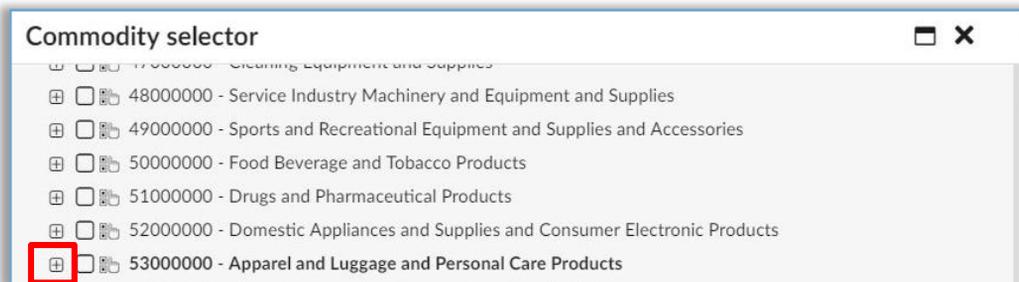


Select Commodities

Keywords

Relevant search results will be highlighted. Once you find a commodity category you would like to view in more detail, click the **Plus** icon.

4



Commodity selector

- 47000000 - Cleaning Equipment and Supplies
- 48000000 - Service Industry Machinery and Equipment and Supplies
- 49000000 - Sports and Recreational Equipment and Supplies and Accessories
- 50000000 - Food Beverage and Tobacco Products
- 51000000 - Drugs and Pharmaceutical Products
- 52000000 - Domestic Appliances and Supplies and Consumer Electronic Products
- 53000000 - Apparel and Luggage and Personal Care Products

If your organization offers all the commodities listed underneath the category, click the **Hand** () icon to select all of the commodities in the category. If you would only like to select a few of the commodities, click the **Checkbox** () icon for the commodities your organization offers. Once you have selected commodities, close the pop-up window.

5



53000000 - Apparel and Luggage and Personal Care Products

- 53100000 - Clothing
- 53110000 - Footwear
- 53120000 - Luggage and handbags and packs and cases
- 53130000 - Personal care products
- 53140000 - Sewing supplies and accessories

- ▲ If you are having trouble finding the correct commodity in Ohio|Buys, you can also visit the UNSPSC website (<https://www.unspsc.org/search-code>) to search for a commodity. Once you have located the commodity on this site, enter the commodity code in the Ohio|Buys **Keywords** field and then **Search** and select it from the results.

6

Click **Save** to save the updates to your company profile. Please note, selecting applicable commodities allows the State of Ohio to easily identify relevant Bidders and Suppliers for solicitations, so it is recommended that your organization maintains accurate selections.



You have now completed the guide for this section. For additional Ohio|Buys training resources and support, please refer to the [Accessing Additional Training Resources and Support](#) section in this guide.

# ACCESSING ADDITIONAL TRAINING RESOURCES AND SUPPORT

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## Overview:

- What's Covered: Instructions for accessing additional Ohio|Buys training materials and support.
- When to Reference This Section: When you need additional information or support.

## Step-by-Step Instructions for Accessing Additional Training Resources and Support

Suppliers and Bidders are strongly urged to complete training to begin successfully working in Ohio|Buys. Training beyond this guide includes step-by-step navigational videos and job aids.

The training videos and job aids are available on the [Ohio|Buys website](#).

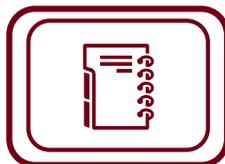
### Videos:

Link to Video	Description of Content
<a href="#">Accessing and Navigating Ohio Buys for Existing Suppliers</a>	Instructions on how to access Ohio Buys as an existing supplier and manage your company's profile.
<a href="#">Accessing and Navigating Ohio Buys for New Bidders</a>	Instructions on how to access Ohio Buys as a new bidder and manage your company's profile.
<a href="#">Viewing and Responding to Solicitations</a>	Instructions on how new bidders and existing suppliers can view and respond to State solicitations in Ohio Buys.
<a href="#">Reviewing and Acknowledging Purchase Orders</a>	Instructions on how to review purchase orders within Ohio Buys, as well as how to send acknowledgement to the State on your intent to fulfill them.
<a href="#">Managing Advanced Shipping Notices and Returns</a>	Instructions on how suppliers can send advanced shipping notices (ASNs) in Ohio Buys to notify State buyers of a pending delivery of goods. This video also provides instructions on how suppliers can manage returns in Ohio Buys.
<a href="#">Reviewing Exceptions and Updating Improvement Plans</a>	Provides an overview of the State's new tools to evaluate supplier performance, document issues, and drive improvement.

A



Training Videos



Job Aids



Help Desk Support

**Step-by-Step Instructions for Accessing Additional Training Resources and Support**

**Job Aids:**

A

Link to Job Aid	Description of Content
<a href="#">Access and Review Public Solicitations</a>	Instructions on how to review posted solicitations in Ohio Buys.
<a href="#">View and Respond to a Solicitation</a>	Instructions on how to access a solicitation, review its content, and submit a response in Ohio Buys.
<a href="#">Review and Acknowledge a Purchase Order</a>	Instructions on how to access a purchase order which has been created for your company in Ohio Buys, review its content, and send an acknowledgement back to the State buyer.
<a href="#">Create an Advanced Shipping Notice (ASN)</a>	Instructions on how to create an ASN in Ohio Buys to let the State buyer know that you have shipped their goods.
<a href="#">Confirm or Reject a Return</a>	Instructions on how to confirm or reject a return of goods within Ohio Buys.
<a href="#">Review and Update an Exception</a>	Instructions on how to review and respond to an exception in Ohio Buys. Exceptions are formal complaints or compliments created against a supplier.
<a href="#">Update an Improvement Plan</a>	Instructions on how to review and update an improvement plan in Ohio Buys. Improvement plans are a roadmap of tasks presented to a Supplier that are designed to help a Supplier improve their performance with the State of Ohio.
<a href="#">Access and Review the Public Catalog</a>	Instructions on how to review the goods and/or services that are offered by Suppliers in Ohio Buys.
<a href="#">Import a Hosted Catalog</a>	Instructions on how to prepare and load a list of goods and/or services your organization offers as part of a State contract.
<a href="#">Requisite Program Supplier Log In</a>	Instructions on how to access Ohio Buys as a Requisite Program Supplier.

You have now completed the guide for this section. For additional support, please contact our Ohio Shared Services Team at [ohiosharedservices@ohio.gov](mailto:ohiosharedservices@ohio.gov) or 877-644-6771

# Version Control

Version	Publish Date	Summary of Updates	Pages Updated
1.0	4/24/20	Initial draft	ALL
1.1	5/27/20	R2 – Sprint 3 updates around search functionality using multiselect fields	19
1.2	6/8/20	R2 Enhancement Sprint #4: Updates to Supplier view when selecting multiple locations	18,22
1.3	6/23/20	R2 Enhancement Sprint #5: Added revised Ohio Buys landing page	6,11
1.4	7/10/20	R2 Enhancement Sprint #6: Added phone number extension field	26