

# Ohio | Buys

Connecting Buyers and Suppliers

## Reviewing and Managing Contracts in Ohio|Buys

**Published: October 2020**

Prepared for Suppliers responsible for managing contracts with the State of Ohio in Ohio|Buys.

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# In This Document:

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**Overview:** This learner guide covers the core activities related to reviewing and managing contracts as a Supplier in Ohio|Buys.

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## Processes Covered:



- 1) Contract Review and Authoring:** Ohio|Buys serves as the dedicated portal for all contracts with the State of Ohio. During the contract review and authoring process, users are able to redline and suggest updates directly within Ohio|Buys, as well as export the document(s) into other file types to complete their review. When the terms of the agreement are finalized, users will sign contracts in Ohio|Buys using OneSpan Sign.



- 2) Contract Maintenance:** After the creation of a contract, subsequent updates and revisions will take place directly in Ohio|Buys. Suppliers can submit change requests to ask for modifications to be made to the existing terms of the agreement. Additionally, users will maintain important contract information such as tracking subcontractors and their payments and reporting revenue share within the contract in Ohio|Buys



- 3) Public Contracts Portal:** The State has established a portal where users can access and review certain publicly available contracts. This portal is housed in Ohio|Buys.

▲ Note that the contract negotiation process in Ohio|Buys can occur prior to selection of a Bidder and/or Supplier. Participating in negotiations does not guarantee that the contract will be awarded.

# Contract Navigation

When accessing a contract in Ohio|Buys users will be presented with a number of navigational tabs containing specific information. Please refer to the table below for details on when to access each tab.

| Tab                            | Contents   |
|--------------------------------|--|
| <b>Contract Header</b>         | Contains general information about the contract, including the name, contract dates, participating organizations, (i.e., the State agencies included on the contract) and the contracting entity (i.e., the State agency responsible for managing the contract)  |
| <b>Price List</b>              | Contains pricing information including the price list for items included on the contract, users are able to export the price list into excel format and make updates   |
| <b>Hierarchy</b>               | Displays parent/child agreements associated with the contract  |
| <b>Documents</b>               | Contains relevant documents associated with the contract, including the main terms of the agreement, where review, redlining, and the uploading of additional documents take place (for more details please refer to <a href="#">Review and Redline a Contract</a> and <a href="#">Add Contract Documents</a> )  |
| <b>Subcontractors</b>          | Definition: A third party which has been hired to conduct work related to the terms of the contract<br>Tab contains a list of subcontractors associated with the contract, contract holders (i.e., suppliers) can document payments made to subcontractors within Ohio Buy (for more details please refer to <a href="#">Manage Subcontractor Payments</a> ) |
| <b>Revenue Share*</b>          | Provides a location for authorized users to view revenue share payment calculations and revenue share payment history; also allows co-op users to report spend against the contract (for more details refer to <a href="#">Supplier Revenue Share</a> )  |
| <b>Supplier Change Request</b> | Provides a portal to view previous, and submit new contract change requests for review by the State (for more details refer to <a href="#">Create a Change Request</a> )   |
| <b>Usage Report</b>            | Provides a location for users to obtain a Usage Report spreadsheet template (for more details please refer to <a href="#">Generate a Usage Reports</a> )   |
| <b>Dealers</b>                 | Definition: Entities that are authorized to resell a product, supply or service from a product or supply manufacturer, and/or service provider.<br>Displays any Dealers that are associated with the contract  |

\*Note that the Revenue Share tab will only be visible on applicable contracts.

# CONTRACT REVIEW AND AUTHORIZING

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## Topics

- Review and Redline a Contract
- Add Contract Documents
- Sign a Contract

# REVIEW AND REDLINE A CONTRACT

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## Overview

- What's Covered: The process for accessing, reviewing, and redlining a contract in Ohio|Buys.
- Used When: Reviewing and negotiating a contract in Ohio|Buys. Suppliers can only redline a contract when it is under negotiation. If the contract is active and signed, Supplier should submit a change request if they would like to request updates.

## Step-by-Step Instructions for Reviewing and Redlining a Contract

1

Navigate to [supplier-emarketplace.ohio.gov](http://supplier-emarketplace.ohio.gov) and log in to Ohio|Buys using your OHID.

2

From the Main Menu Navigation Bar, click **Contracts** then click **Manage Contracts**.

The screenshot shows the Ohio Buys Supplier Portal navigation bar. The 'Contracts' menu item is highlighted with a red box, and the 'Manage Contracts' sub-menu item is also highlighted with a red box. The main content area shows 'My Purchase Orders' with 3 results.

| ID         | Buyer Contact | Status  | Currency | Ordered | Progress   | Delay (d) |
|------------|---------------|---------|----------|---------|--|-----------|
| PO00000787 | Robinson Will | Ordered | USD      | 34.00   | Initialized; Requisitioner Review; Supplier Acknowledgment |           |
| PO00000786 | Ryan Kyle     | Ordered | USD      | 34.00   | Initialized; Requisitioner Review; Supplier Acknowledgment |           |

3

The Manage Contracts page is displayed. You can search for contracts by Keywords, and can filter your search results by Contracting Entity or Status.

The screenshot shows the Manage Contracts page. The search filters are set to Keywords: License, Contracting Entity: DAS-Administrative Services, and Status: Awaiting Effective Date, Approved, Negotiation in Progress, Approval in Progress, Signature in Progress, Signed, Send to OAKS, Terminated, Suspended. The search results table shows 3 results.

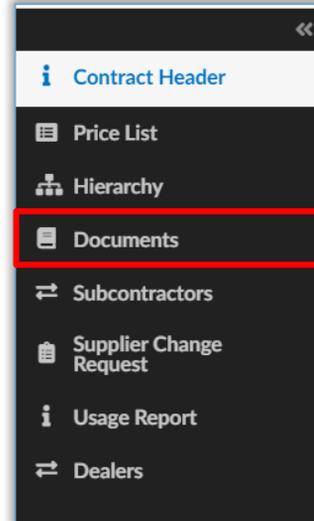
| Code      | Name   | State Contract Number | Contracting Entity          | Effective Date | Original End Date | Current End Date | Status                | Catalog Enabled |
|-----------|--|-----------------------|-----------------------------|----------------|-------------------|------------------|-----------------------|-----------------|
| CTR000363 | Retroreflective Sheeting for Embossed License Plates | OT904417              | DAS-Administrative Services | 1/1/2017       | 12/31/2018        | 12/31/2019       | Signed                |                 |
| CTR000361 | License Plate Sticker Printing System                | OT903318              | DAS-Administrative Services | 2/1/2018       | 1/31/2021         | 1/31/2021        | Signature in Progress |                 |
| CTR000328 | License Plate Sticker Print on Demand                | CSP906618             | DAS-Administrative Services | 2/1/2018       | 12/31/2021        | 12/31/2021       | Signature in Progress |                 |

When you identify the contract you would like to review, click the **Pencil** (✎) icon.

## Step-by-Step Instructions for Reviewing and Redlining a Contract

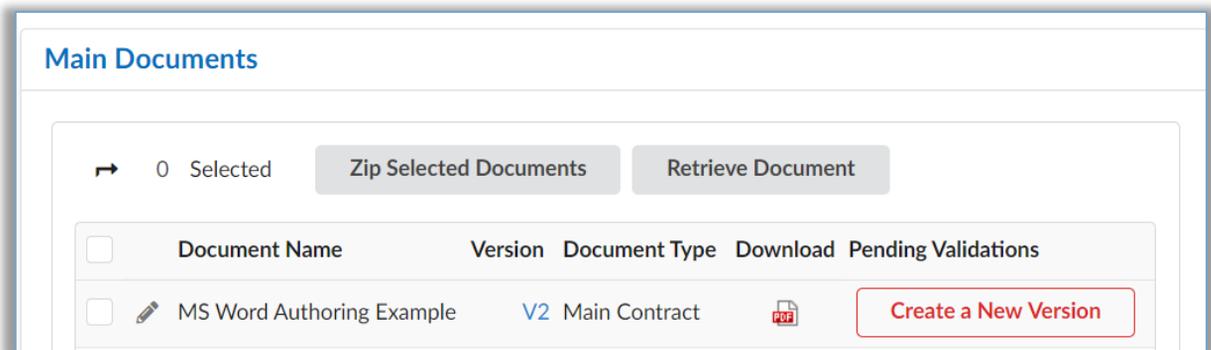
4

The Contract Header is displayed. Navigate to the **Documents** tab to access the relevant contract document to be reviewed and redlined.



5

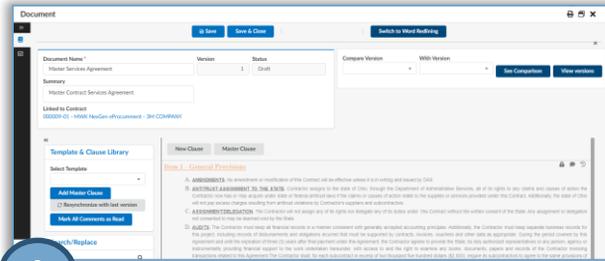
Review any **Main** or **Supplemental Documents** associated with the contract. Files can be exported by clicking the file type icon (e.g. ) or can be combined into a zip document by selecting the **Checkbox** () icons and clicking **Zip Selected Documents**.



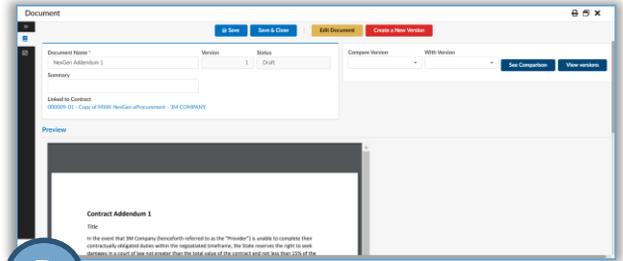
Documents with a Document Type of Main Contract can be opened for review and redlining. To open a document for review and redlining, click the **Pencil** () icon.

## Step-by-Step Instructions for Reviewing and Redlining a Contract

- ▲ The State may choose to allow for review and redlining to occur in one of two formats. Determine which format the State has chosen for this specific contract based on the images below, and follow the steps that correspond to that format.



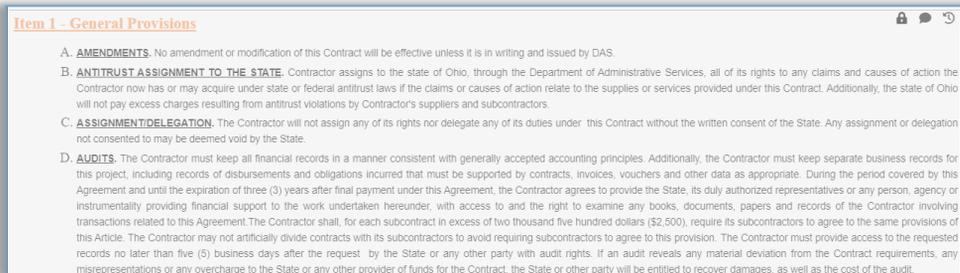
**A** Document Clauses are written and stored directly in Ohio|Buys



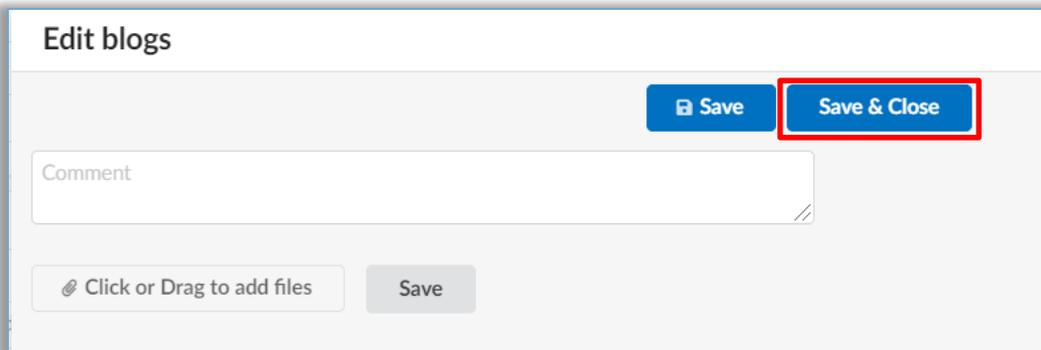
**B** Documents are displayed as a PDF with clauses accessible via Microsoft Word

- Document clauses are written directly in Ohio|Buys. Users will only be able to add comments during their document review.

- Review the contents of the document clause. To add comments, click the **Comments** (💬) icon.



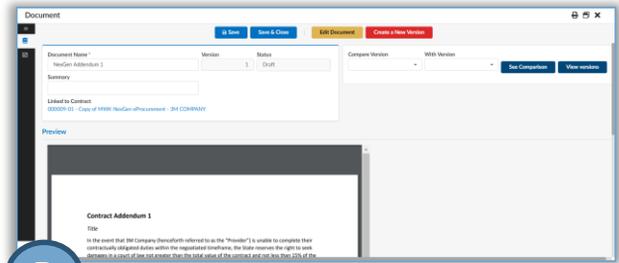
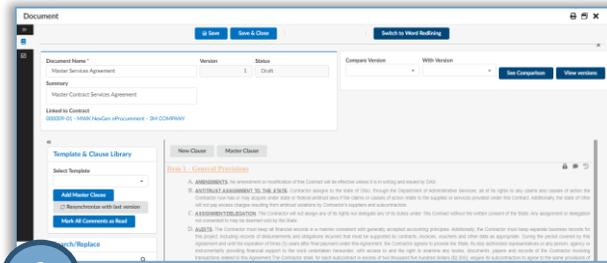
- Type your comments in the **Edit Blogs** window. Be sure to be as specific as possible. You can also attach other relevant files to your comment as needed.



- When you are finished, click **Save & Close**.

## Step-by-Step Instructions for Reviewing and Redlining a Contract

- ▲ The State may choose to allow for review and redlining to occur in one of two formats. Determine which format the State has chosen for this specific contract based on the images below, and follow the steps that correspond to that format.



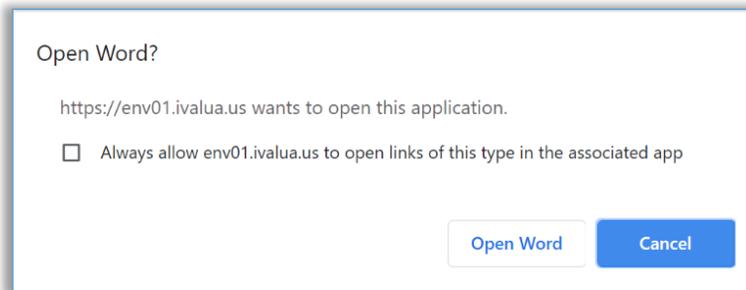
A

B

- b) Documents are edited using Microsoft Word and synced automatically with Ohio|Buys. Users are able to both add comments and make inline edits in Word.

- 1) Click **Create New Version**.

- 2) Click **Open Word** in the prompt that appears.



- 3) The document will open in Microsoft Word. Review and make comments and updates using Word. When you are finished, save the document in Word and close it.

- 4) The document has been synced and updated in Ohio|Buys. Click **Save & Close** to exit the Document window.

Continue reviewing any other documents attached to the contract. Documents with the Other Documents document type must be downloaded and reviewed outside of Ohio|Buys.

7

When you have finished your contract review and are ready to send your comments to the State, click **Submit**.

# ADD CONTRACT DOCUMENTS

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## Overview

- What's Covered: The process for adding and managing documents on a contract in Ohio|Buys
- Used When: Adding Supplier confidential documents to a contract in Ohio|Buys

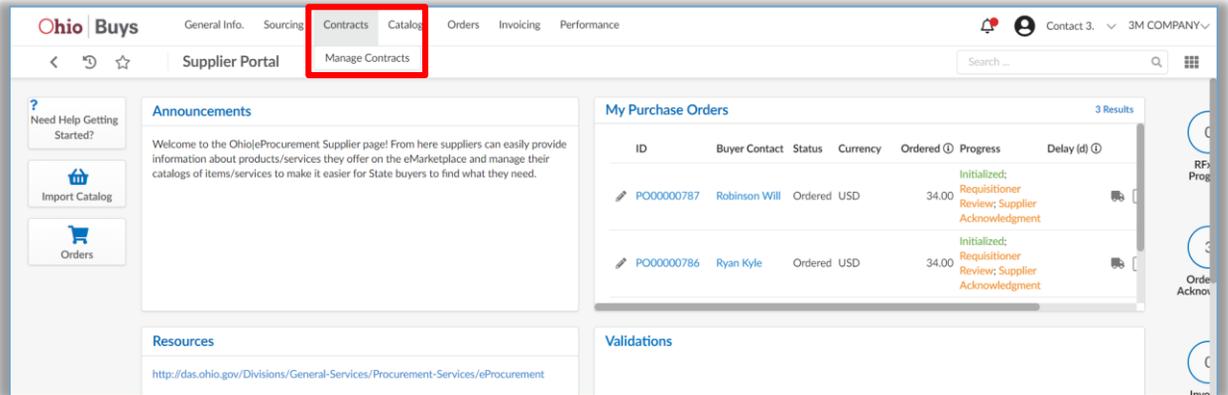
## Step-by-Step Instructions for Adding Contract Documents

1

Navigate to [supplier-emarketplace.ohio.gov](http://supplier-emarketplace.ohio.gov) and log in to Ohio|Buys using your OHID.

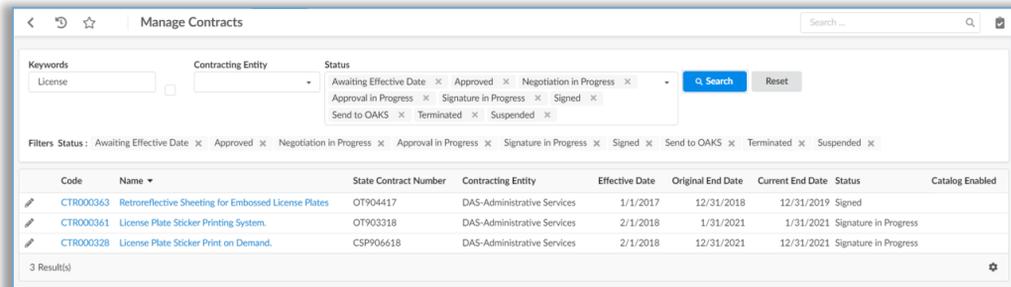
2

From the Main Menu Navigation Bar, click **Contracts** then click **Manage Contracts**.



3

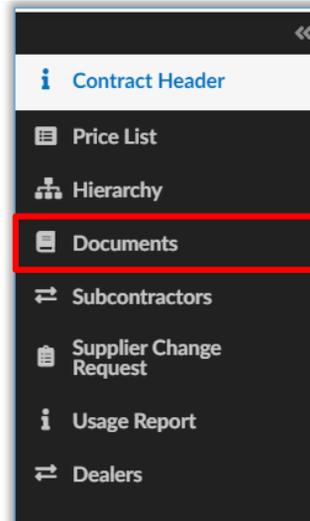
The Manage Contracts page is displayed. You can search for contracts by Keywords, and can filter your search results by Contracting Entity or Status.



When you identify the contract you would like to review, click the **Pencil** (✎) icon.

4

Navigate to the **Documents** tab.



## Step-by-Step Instructions for Adding Contract Documents

5

Click **Create Document** to add a Supplier confidential document. A supplier confidential document is a document that will only be visible to users associated with the Supplier's record and State users on the contract team. This is the only document type that can be created here.

The screenshot shows a web interface with two main sections: 'Main Documents' and 'Supplemental Documents'. The 'Main Documents' section has a 'Zip Selected Documents' button and a search bar showing '0 Result(s)'. The 'Supplemental Documents' section features a 'Create Document' button highlighted with a red box. Below this is another 'Zip Selected Documents' button and a table of documents.

|                          | Title       | Type                                      | Contact      | Last Modification (UTC-4) | Creation Date (UTC-4) | Validity End Date | Version |
|--------------------------|-------------|---|--------------|---------------------------|-----------------------|-------------------|---------|
| <input type="checkbox"/> | Floor Plans | Supplier Confidential Document (Approved) | FIORE Cassie | 6/5/2020 10:01:22 AM      | 6/5/2020 10:01:22 AM  |                   | 1       |

6

The screenshot shows a document creation form with several fields and buttons. At the top are buttons for 'Save as draft', 'Save & Close', 'Publish', and 'Delete'. The form is divided into sections: 'Title', 'Information', 'Summary', and 'Contract'. Three numbered callouts (1, 2, 3) point to the 'Title', 'Version', and 'Summary' fields respectively.

- 1) Input the document **Title**.
- 2) Input the **Version** of the document.
- 3) Write a description of the document in the **Summary** field.

7

Click **Click or Drag to add files** and select the file you want to upload

8

Click **Publish** to add the document.

# SIGN A CONTRACT

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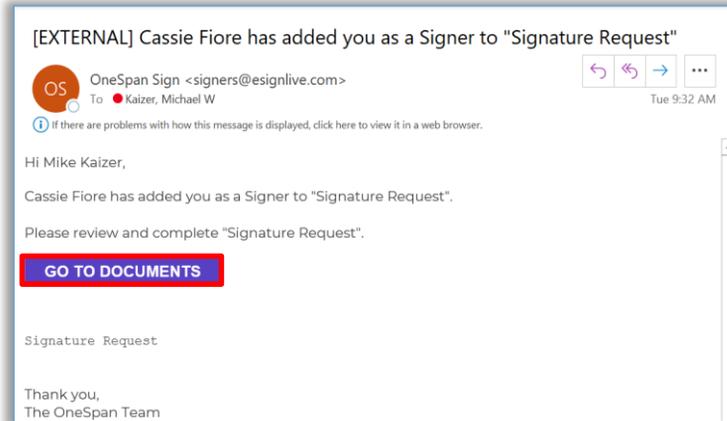
## Overview

- What's Covered: The process for signing a contract in Ohio|Buys
- Used When: Signing a finalized agreement with the State in Ohio|Buys

## Step-by-Step Instructions for Signing a Contract

When you have a document to sign in Ohio|Buys you will receive an email from OneSpan Sign indicating that you have been added as a signer. Click **Go To Documents** in the email.

1



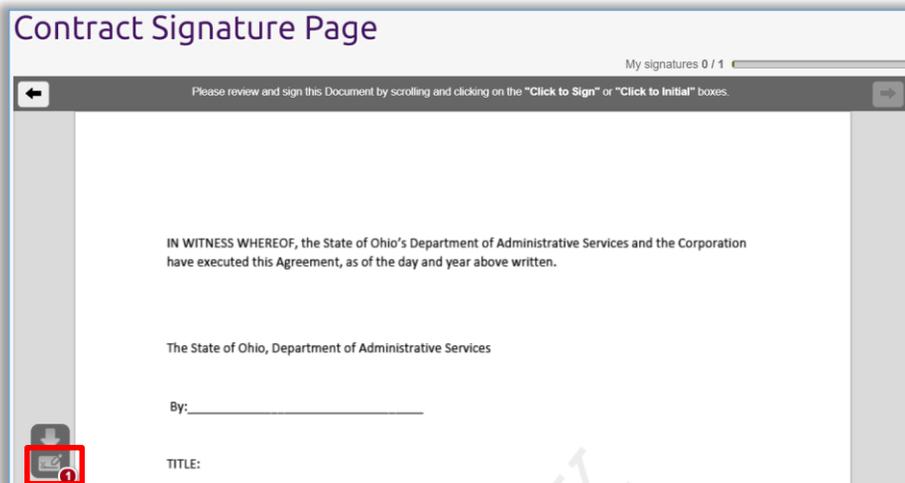
You will be prompted with the OneSpan Sign terms and conditions. Scroll to the bottom of the page and click **Accept**.

2

A rectangular button with a light gray background and a thin border, containing the word "Accept" in a bold, black, sans-serif font.

A PDF of the contract document that requires your signature will be displayed. To quickly access the places that require your signature, click the **Access Signatures** (  ) icon.

3



Click to sign where indicated.

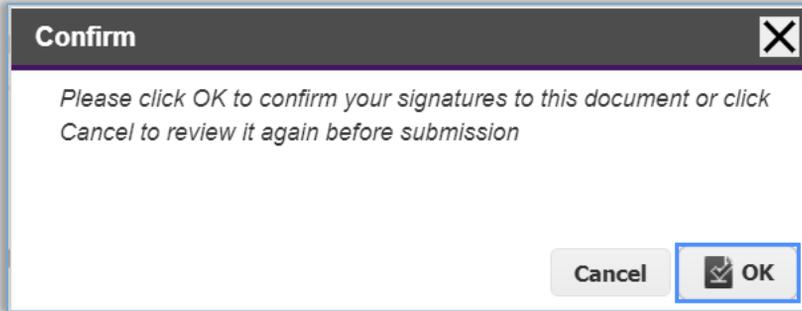
4

A yellow rectangular button with a thin border, containing a large black "X" icon and the text "Click to Sign" in a bold, black, sans-serif font.

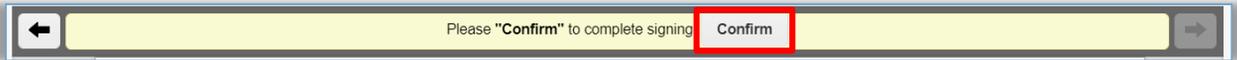
Step-by-Step Instructions for Signing a Contract

Repeat steps 3 and 4 as necessary. Once you have finished signing in all of the necessary places, you will be prompted to confirm that you are finished signing the document. Press **OK** to confirm, or **Cancel** to continue reviewing the document.

5

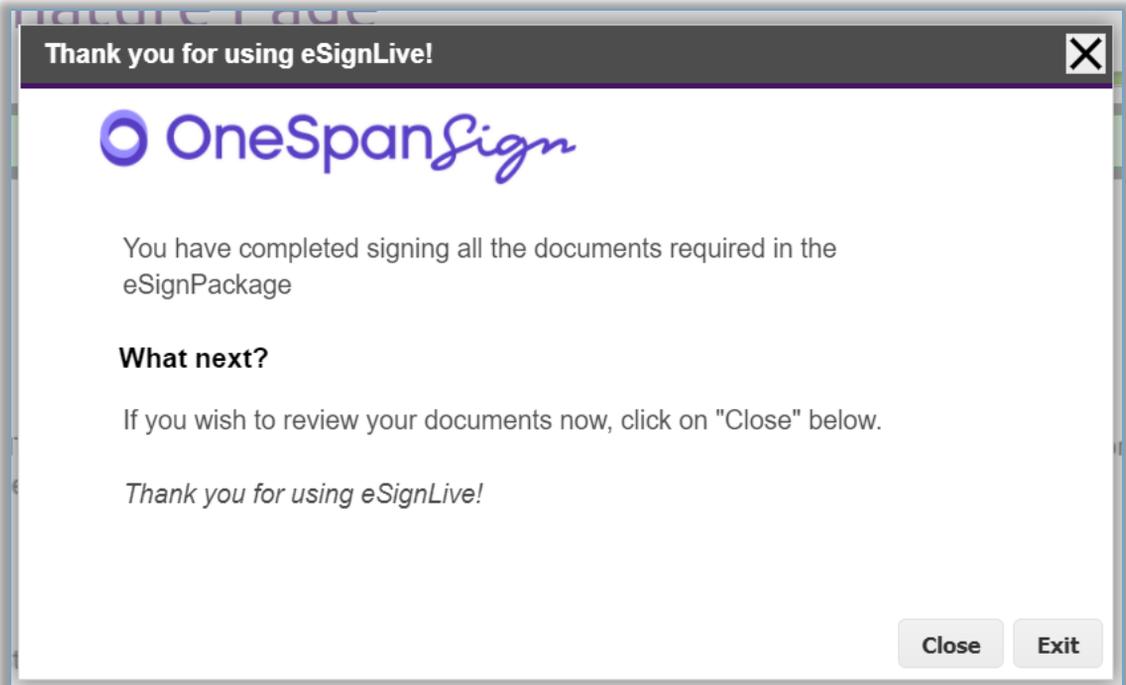


▲ If you choose to continue reviewing the document, click **Confirm** at the top of the page to be re-prompted to complete your signatures.



6

Your electronic signature has been applied to the assigned documents. If you wish to continue to review the documents, click **Close**. Otherwise, click **Exit**.



# CONTRACT MAINTENANCE

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## Topics

- Create a Change Request
- Supplier Revenue Share
- Manage Subcontractor Payments
- Generate a Usage Report

# CREATE A CHANGE REQUEST

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## Overview

- What's Covered: The process for creating and submitting a change request on a contract in Ohio|Buys
- Used When: Asking for a modification to an existing contract in Ohio|Buys

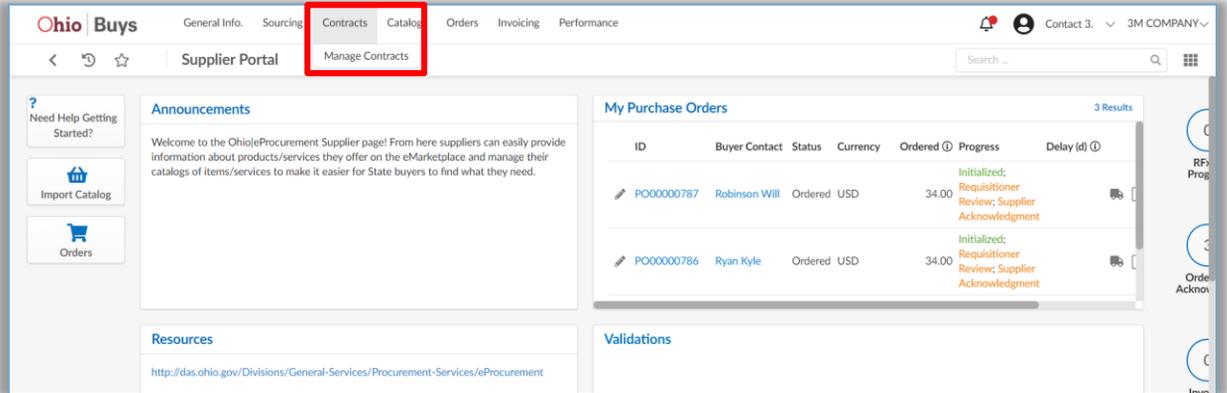
## Step-by-Step Instructions for Creating a Change Request

1

Navigate to [supplier-emarketplace.ohio.gov](http://supplier-emarketplace.ohio.gov) and log in to Ohio|Buys using your OHID.

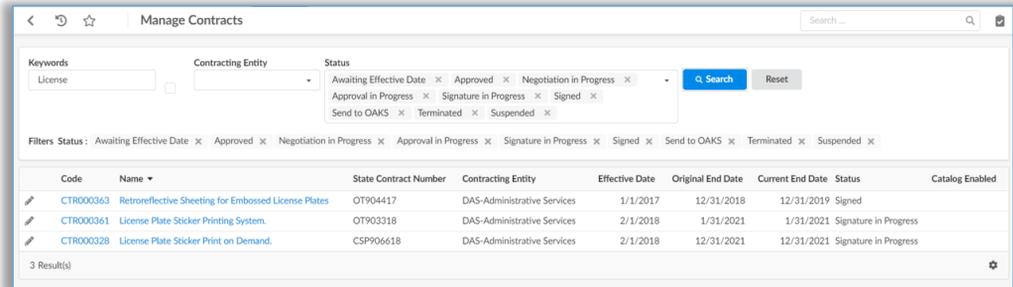
2

From the Main Menu Navigation Bar, click **Contracts** then click **Manage Contracts**.



3

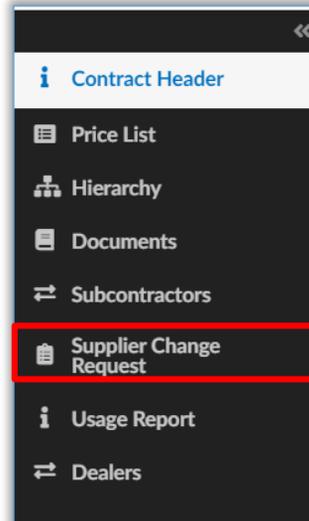
The Manage Contracts page is displayed. You can search for contracts by Keywords, and can filter your search results by Contracting Entity or Status.



When you identify the contract you would like to review, click the **Pencil** (✎) icon.

4

Navigate to the **Supplier Change Request** tab.



## Step-by-Step Instructions for Creating a Change Request

5 Click **Create Change Request**.

Supplier Change Request

Create Change Request

The Supplier Change Request window is displayed.

The screenshot shows the 'Supplier Change Request' window. It contains the following fields and elements:

- Contract:** A text box containing 'CARPET, CARPET TILE, CUSHION & RELATED' with a circled '1' next to it.
- Supplier Change Request:** A drop-down menu with a circled '1' next to it.
- Supplier Change Request Description:** A large text area with a circled '2' next to it.
- Attachment:** A box with the text 'Click or Drag to add a file' and a circled '3' next to it.

- 6
- 1) Supplier Change Request** – Select the type of change request from the drop-down menu. Options include adding or removing dealer(s), adding or removing sub-contractor(s), adding or updating a leasing agreement, changes to the scope, deliverable or timeline, or other clarifications and modifications.
  - 2) Supplier Change Request Description** – Write a detailed description of what change you would like made to the contract, and why.
  - 3) Attachments** – Click to attach any appropriate files for your change request
- ▲ Any change requests submitted (e.g., updating a price list with increased prices) **must** include a justification and any associated documentation. Failure to provide an explanation for the change request and any necessary supporting documents may result in the change request being denied by the State.

7 Click **Save & Close**.

Save & Close

8 Click **Submit Change Request**.

Submit Change Request

Once a change request is submitted the State analyst will review it, and if it is approved the State will issue an amendment with your changes incorporated.

# SUPPLIER REVENUE SHARE

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## Overview

- What's Covered: The process for reporting Co-op spend on the Revenue Share tab of a contract in Ohio|Buys
- Used When: If your contract is a Revenue Share contract, you must report the quarterly dollar value (rounded to the nearest whole dollar) of the sales to political subdivisions (i.e., cooperative (co-op) purchasing members) under the contract by calendar quarter (i.e., January-March, April-June, July-September and October-December). The dollar value of the sale is the price paid by co-ops for the products and/or services listed on the purchase order or other encumbering document, as recorded by the Contractor

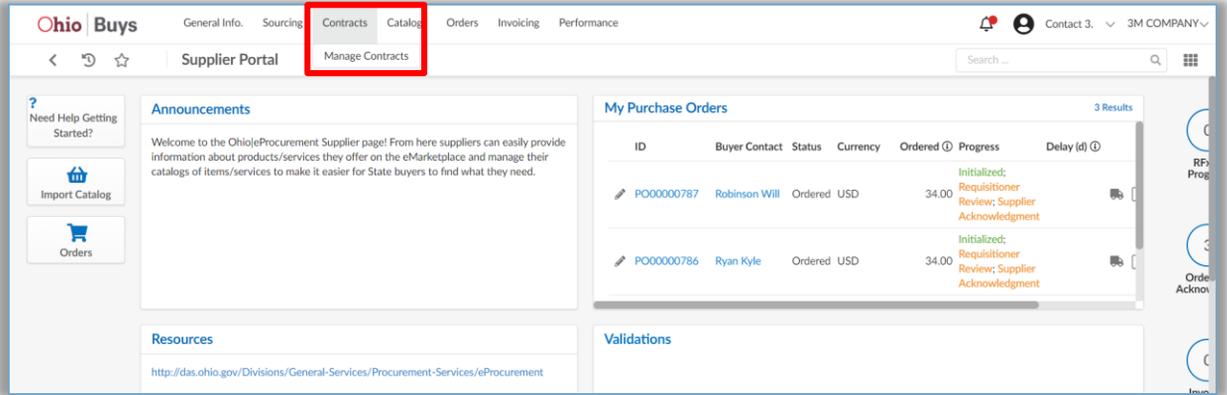
## Step-by-Step Instructions for Adding Supplier Revenue Share

1

Navigate to [supplier-emarketplace.ohio.gov](http://supplier-emarketplace.ohio.gov) and log in to Ohio|Buys using your OHID.

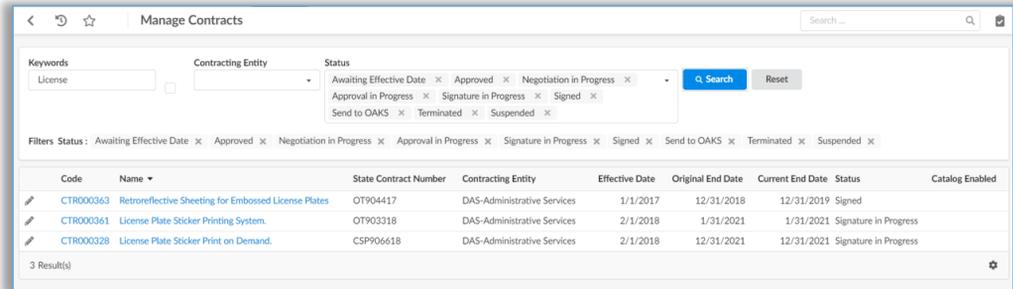
2

From the Main Menu Navigation Bar, click **Contracts** then click **Manage Contracts**.



3

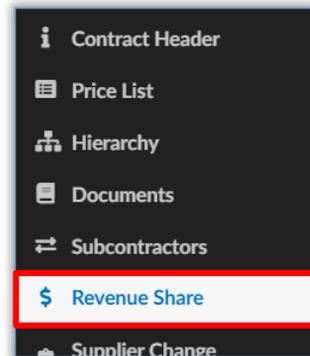
The Manage Contracts page is displayed. You can search for contracts by Keywords, and can filter your search results by Contracting Entity or Status.



When you identify the contract you would like to review, click the **Pencil** (✎) icon.

4

Navigate to the **Revenue Share** tab.

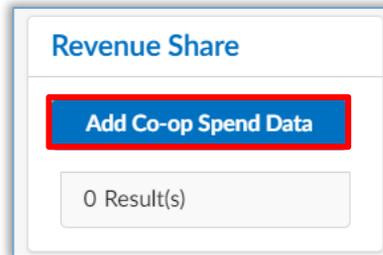


▲ Note: The Revenue Share tab is only visible on the left-hand side of the page if the contract's Revenue Share flag = "Yes".

## Step-by-Step Instructions for Adding Supplier Revenue Share

5

Click **Add Co-op Spend Data**.



Revenue Share

**Add Co-op Spend Data**

0 Result(s)

6

## Supplier Reported Co-op Spend

Contract

CARPET, CARPET TILE, CUSHION &amp; RELATED

Fiscal Year

2020 - State of Ohio

Quarter

July- September

Total Co-op Spend Amount

9,556.230

Dealer ID

ENVIRONMENTAL FLOORING GROUP

- 1) Select the **Fiscal Year** from the drop-down menu.
- 2) Select the appropriate **Quarter**.
- 3) Fill in the **Total Co-op Spend Amount**.
- 4) Select the **Dealer ID** from the drop-down menu

7

Click **Save & Close**.



# MANAGE SUBCONTRACTOR PAYMENTS

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## Overview

- What's Covered: The process for managing subcontractors and adding payments in Ohio|Buys
- Used When: Adding payments to subcontractors

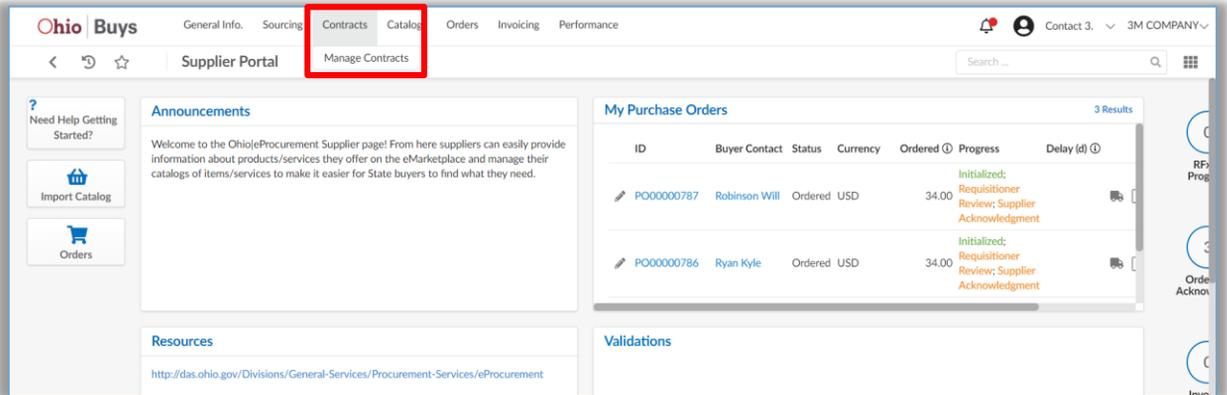
## Step-by-Step Instructions for Managing Subcontractor Payments

1

Navigate to [supplier-emarketplace.ohio.gov](http://supplier-emarketplace.ohio.gov) and log in to Ohio|Buys using your OHID.

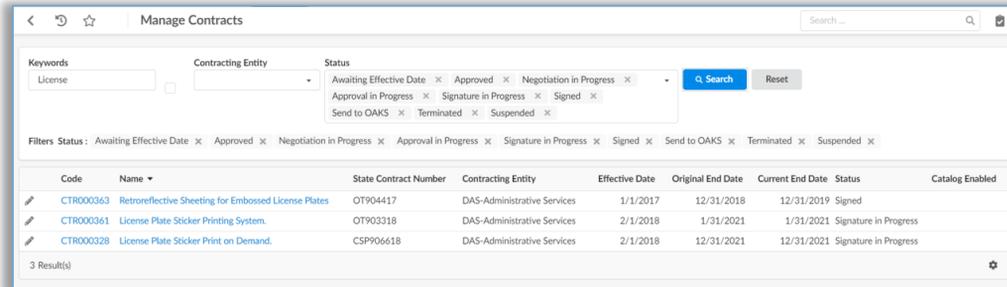
2

From the Main Menu Navigation Bar, click **Contracts** then click **Manage Contracts**.



3

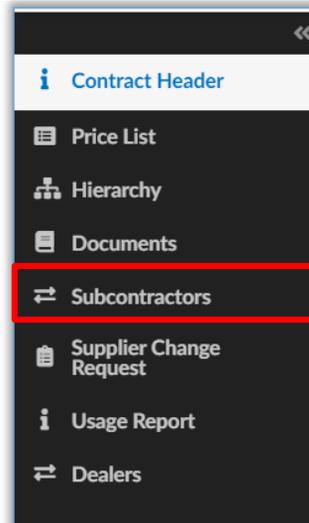
The Manage Contracts page is displayed. You can search for contracts by Keywords, and can filter your search results by Contracting Entity or Status.



When you identify the contract you would like to review, click the **Pencil** (✎) icon.

4

Navigate to the **Subcontractors** tab.



## Step-by-Step Instructions for Managing Subcontractor Payments

5

The subcontractors associated with the contract are displayed. To update the payment information for a subcontractor, click the **Pencil** (✎) icon.

| Subcontractor Name               | EOD Status | Effective Date | Expiration Date | Embedded Dollar Amount | Embedded Percent | Estimated Dollar Amount (Non-Embedded) | Estimated Percentage (Non-Embedded) | Payment Date | Payment Amount | Agencies Debarred By | Active Status            |
|----------------------------------|------------|----------------|-----------------|------------------------|------------------|--|-------------------------------------|--------------|----------------|----------------------|--------------------------|
| #1 RADON-TESTER                  |            |                |                 |                        |                  | 80000                                  | 80%                                 |              |                | DAS<br>DOT           | <input type="checkbox"/> |
| #1 BUCKEYE LAWN & LANDSCAPES LLC |            | 6/5/2020       | 3/5/2021        | 1145                   | 55%              | 7600                                   | 78%                                 |              |                |                      | <input type="checkbox"/> |
| 2 Result(s)                      |            |                |                 |                        |                  |  |                                     |              |                |                      |                          |

6

Information about the subcontractor is displayed. To update payment information, click **Add a Payment**.

### General Information

**Subcontractor Name**  
1 BUCKEYE LAWN & LANDSCAPES LLC

**Effective Date**  
6/5/2020

**Expiration Date**  
3/5/2021

**Embedded Dollar Amount**  
1145

**Embedded Percentage**  
55%

**Estimated Dollar Amount (Non-Embedded)**  
7600

**Estimated Percentage (Non-Embedded)**  
78%

**Attachments**  
Click or Drag to add a file

Active Status

### Payments

Add a Payment

7

Complete the Payment Information by inputting the **Payment Date** and the **Payment Amount**. Attach any appropriate files documenting the payment by clicking **Proof of Payment** and selecting them from your device.

### Payment Information

**Payment Date**

**Payment Amount**

**Proof of Payment**  
Click or Drag to add a file

8

Click **Save & Close**.

Save & Close

# GENERATE A USAGE REPORT

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## Overview

- What's Covered: The process for generating a Usage Report for a contract in Ohio|Buy
- Used When: Preparing a usage report on a contract

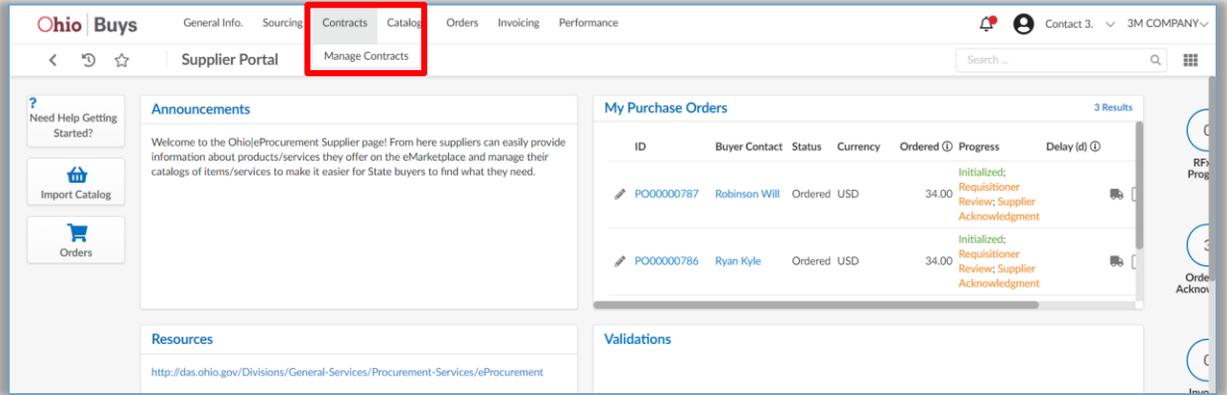
## Step-by-Step Instructions for Generating a Usage Report

1

Navigate to [supplier-emarketplace.ohio.gov](http://supplier-emarketplace.ohio.gov) and log in to Ohio|Buys using your OHID.

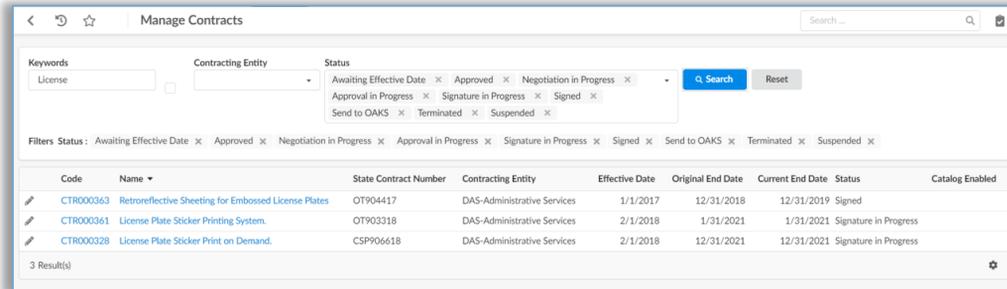
2

From the Main Menu Navigation Bar, click **Contracts** then click **Manage Contracts**.



3

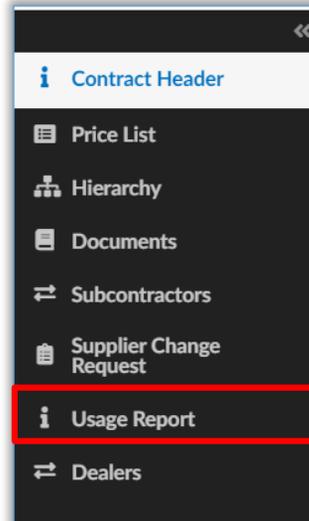
The Manage Contracts page is displayed. You can search for contracts by Keywords, and can filter your search results by Contracting Entity or Status.



When you identify the contract you would like to review, click the **Pencil** (✎) icon.

4

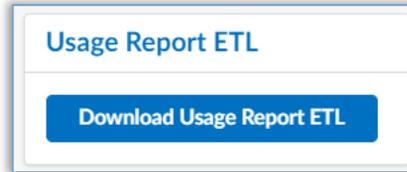
Navigate to the **Usage Report** tab.



### Step-by-Step Instructions for Generating a Usage Report

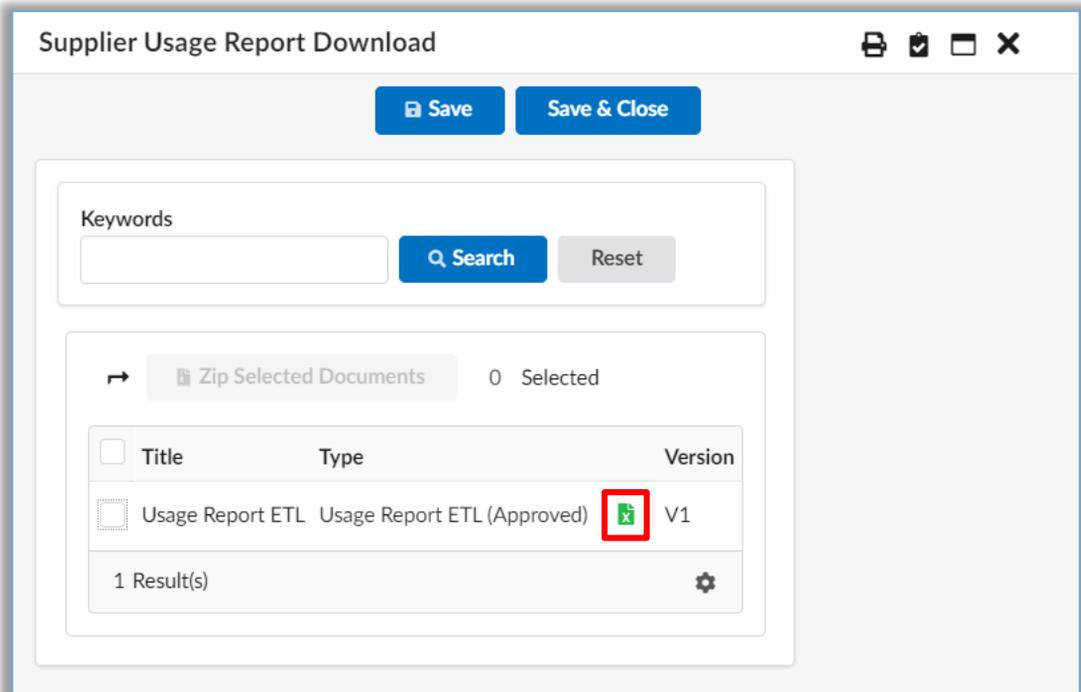
5

Click **Download Usage Report ETL**. Please note, an ETL is essentially an Excel spreadsheet template that is used to gather usage report data in standard format that can be loaded into Ohio|Buys.



6

Click the **Excel (  )** icon to download the usage report in Excel format.



▲ For assistance uploading any completed Usage Report ETL templates, please submit an Ohio Shared Services Helpdesk ticket. An Ohio|Buys Admin will upload the completed usage report data on your behalf.

# ACCESS THE PUBLIC CONTRACTS PORTAL

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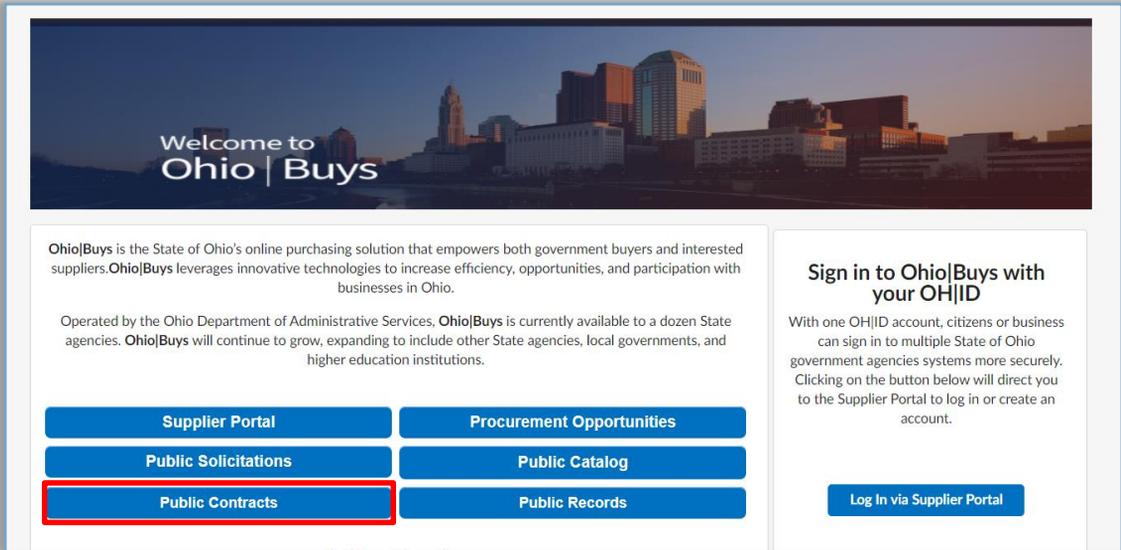
## Overview:

- What's Covered: The process for accessing and reviewing the public contracts portal in Ohio|Buys
- Used When: Reviewing public contracts with the State of Ohio

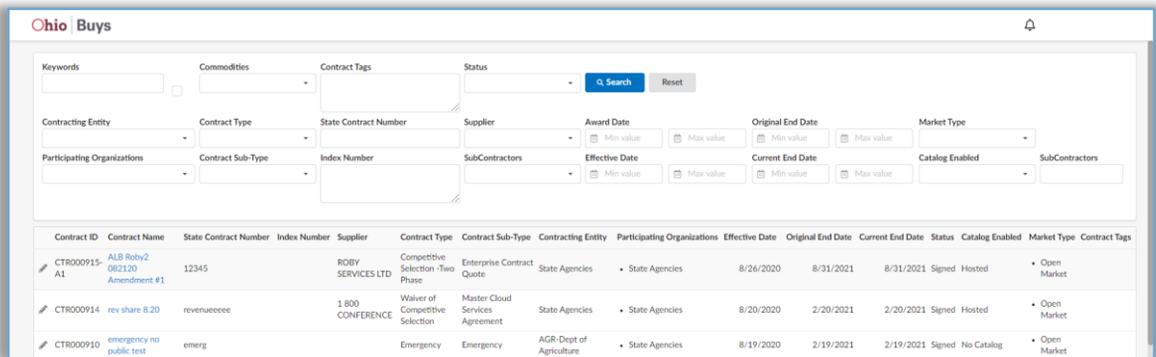
### Step-by-Step Instructions for Accessing the Public Contracts Portal

Navigate to [supplier-emarketplace.ohio.gov](https://supplier-emarketplace.ohio.gov) and click **Public Contracts**.

1



The public contracts portal is displayed.



When you have identified the contract you would like to view, click the **Pencil** (✎) icon to open it.

2

▲ Users can search for existing public contracts using a variety of search criteria, including:

- Keywords
- Commodities
- Contract Tags
- Status
- Contracting Entity
- Contract Type
- State contract number
- Supplier
- Award date
- Original End Date
- Market Type
- Participating Organizations
- Contract Sub-Type
- Index Number
- SubContractors
- Effective Dates
- Current End Date
- Catalog Enabled

**Step-by-Step Instructions for Accessing the Public Contracts Portal**

Information about the contract is displayed.

3

**Contract Header**

|   |  |  |
|---|--|--|
| <b>Contract Name</b><br>Careworks Test Contract                                     |  |  |
| <b>Supplier</b><br>CAREWORKS TECHNOLOGIES   | <b>Contract ID</b><br>CTR000973  |  |
| <b>State Contract Number</b><br>000000012121  | <b>Contract Type</b><br>Competitive Selection  | <b>Amendment Comments</b><br><div style="border: 1px solid #ccc; height: 20px;"></div> |
| <b>Index Number</b><br><div style="border: 1px solid #ccc; height: 20px;"></div>    | <b>Contract Sub-Type</b><br>Enterprise Contract  | <b>Contract Responsible</b><br>Kaizer Mike   |
| <b>Market Type</b><br>Open Market,  | <b>Contracting Entity</b><br>State Agencies  |  |
| <b>Contract Owner</b><br>DAS  | <b>Catalog Enabled</b><br>Hosted   |  |
| <b>Public Comments</b><br><div style="border: 1px solid #ccc; height: 20px;"></div> | <b>Sourcing Project</b><br>MWK Sourcing Project Test   |  |
| <b>Status</b><br>Signed   | <b>Minimum Contract Purchase Amount</b><br><div style="border: 1px solid #ccc; height: 20px;"></div> |  |
| <b>Parent Contract</b><br><div style="border: 1px solid #ccc; height: 20px;"></div> | <b>Parent Agreement</b><br><div style="border: 1px solid #ccc; height: 20px;"></div>                 |  |

# Version Control

| Version | Publish Date | Summary of Updates | Pages Updated |
|---------|--------------|--------------------|---------------|
| 1.0     | 10/15/20     | Initial draft      | All           |
|         |              |                    |               |
|         |              |                    |               |
|         |              |                    |               |