Greetings,

Ohio|Buys Enhancement Sprint 7 is deployed, and these enhancements are now available as of Tuesday, May 18th.

1. Update Supplier Batch Load Integration to Ignore Duplicate Email Addresses on Supplier Contacts
The Supplier Batch Load Integration has been updated to ignore duplicate email addresses for Supplier contracts, this will further reduce instances where supplier contacts that exist in OAKS are not imported into Ohio|Buys. Even though OAKS allows for multiple supplier contacts to share the same email address, Ohio|Buys does not because there must be a one-to-one relationship between email address and OH|ID - which is how supplier contacts access Ohio|Buys.

2. Add Agency Use Field to Approvals Grid and Export
AGENCY_USE, ALI, DEP, FUND_FROM, FUND_TO, OPERATING_UNIT, PROGRAM, PROJECT_GRANT, REPORT, SERVICE_LOCATION, ACCOUNT_FROM, ACCOUNT_TO, BUDGET_REFERENCE, and UNSPSC columns have added to the grid on the Manage Rules page. To toggle which columns are displayed, right-click on any of the column headers and use the sliders to make updates.

In addition, search filters for Department Reporting Levels (e.g., Dept lvl 4, Dept lvl 5, Dept lvl 6, Dept lvl 7), Agency Use, Account From/To, UNSPSC, and Report have also been added to this page.

3. Make Contract Owner Field Editable via Amendment
The Contract Owner field has become editable for contract amendments. Please note, this field is only present on contracts that interface to OAKS and is not present on Agency Administered contracts.

The Contracts Learner Guide has been updated to reflect this change.

4. Default Publicly Post Opportunity to be checked on Triple Envelope Projects
For sourcing projects, the Advanced Option for Publicly Post Opportunity will now default as checked but will be editable for all Triple Envelope sourcing projects.

The Solicitations Learner Guide has been updated to reflect this change.

5. Update HCM Integration to Account for Effective Dated Rows
The HCM integration has been updated so future-dated effective dates are processed correctly (e.g., if an employee is set to be terminated in two days, Ohio|Buys will flip that user to blocked in two days).

6. Printing Contract Analyst updates the Bill To address to be the Printing Bill To Address
Requisitions that have the Commercial Printing slider checked will now list State Printing's Bill To address rather than the agency's Bill To address. The Printing Bill To address will be visible on the purchase order that is sent to the corresponding Supplier so State Printing can continue
to receive and initially validate invoices for Commercial Print jobs prior to agencies reviewing them.

The State Printing Learner Guide has been updated to reflect this change and will be posted soon.

7. Update Solicitation Notification
The email notification that is sent to an invited Supplier for a solicitation has been updated so the associated Contract Analyst's name is removed.

8. CB Multi-Selector on Agency Administered Contracts with Threshold Check
The Controlling Board field on Agency Administered contracts has become a multi-selector. Users will still see a blocking alert that purchases with a Supplier cannot exceed $50,000 for a fiscal year, unless Controlling Board Numbers are present. This allows agencies to make amendments to these contracts and reference multiple Controlling Board numbers instead of having to create individual contracts each time a contract is amended, and a new Controlling Board number is obtained. Note: The Controlling Board alert on Agency Administered contracts is driven off the Contract Not to Exceed field on the Negotiated Terms tab of the contract.

The Creating and Managing Contracts Learner Guide has been updated to reflect these changes.

9. Market Type Label Update to "Open Market"
The contract Market Type option of "OPEN: Open Solicitation" has been updated to "Open Market".

10. RTP Enhancements
Several enhancements to the Request to Purchase process have been made:

   a. When action is taken at the DAS Review step of the workflow, the associated creator of the RTP will now be notified via email of the corresponding Resolution.

   b. Comments and attachments have been enabled on the Workflow tab.

   c. A Release & Permit (R&P) field has been added to the Request to Purchase tab. DAS reviewers can use this field to select an existing IT R&P field for a Request to Purchase. The R&P field will also automatically populate when a Non-IT R&P is created for a Request to Purchase.

   d. A Complete step has been added to the end of the workflow. This step will be used for any RTPs that do not result in a R&P or sourcing project.

   e. The Waiver Denied notification has been revised for clarity.

The Submit a Request to Purchase and Review a Request to Purchase Job Aids have been updated to reflect these changes.

11. Create "Is a Clarification" field on Solicitations
A field has been added to solicitations that allows users to indicate whether or not a lot is being used to gather clarifications. This field will be mandatory if the Lot number for a solicitation is greater than 1.

The Solicitations Learner Guide has been updated to reflect this change.

12. MBE Contract Alert
A new non-blocking alert has been added for contracts when the Market Type = MBE: Minority Business Enterprise (i.e., MBE) and the Supplier listed on the contract has an MBE Certification expiring in 14 calendar days or less.

13. Add Reject button on DAS Collaboration Step (Exception workflow)
A Reject button has been added on the DAS Collaboration and Close Exception steps of the Exceptions workflow so exceptions can be pushed back to an earlier step in the workflow if updates need made by another user prior to it being closed.

The Close an Exception Job Aid has been updated to reflect this change.

14. NEW: Exception Modifications
The Organization field is now required for all submitted exceptions. Based on the organization that is selected, the corresponding Agency Exception Reviewer(s) who are part of that organization will be notified to review the exception.

The Submit an Exception Job Aid has been updated to reflect this change.

15. NEW: Query request shows the User/Requester ID name and/or number
A new Agency Requisitions query has been added that displays a list of an agency’s purchase requisitions alongside their corresponding status, workflow position, budget date, and if the purchase is a Pcard purchase.

The Run a Query Job Aid has been updated to reflect this change.

In addition, here are the other non-enhancement related updates that were made during this sprint:

1. The Purchase Requisitions Learner Guide has been updated to add additional clarification regarding the Budget Date field. By default, this field populates with the date the requisition is created, but it can be future dated to create a purchase requisition for the next fiscal year. If a Controlling Board Number is going to be required for the purchase requisition, ensure the Budget Date is greater than or equal to the ECB Waiver Date.

2. The Bidder and Supplier Learner Guide has been updated so the list of job aid links at the end of the document have been removed. Suppliers can access this list of resources on the Ohio|Buys website.

3. The Viewing and Responding to Solicitations Learner Guide has been updated to note Suppliers can submit inquiries for Public Notice and Quick Quotes solicitations (if the Inquiry Dates are populated for the corresponding solicitation).
4. The Create and Post Public Notice Solicitations Job Aid has been updated to walk through how to respond to Supplier inquiries.

If you have questions regarding these enhancements, please send an email to ohiobuys@das.ohio.gov.