Frequently Asked Questions (FAQs)

JUNE 2019

Current state procurement practice stipulates a Release & Permit request requires an attached copy of the CB Request draft to the requisition. Will it be necessary to attach a CB draft in eProcurement?
The Draft will no longer be required.

Will it be possible to add attachments to a purchase order after it has been dispatched to the supplier?
Internal and external attachment options are inactivated once a purchase order has been created however, a change request can be created enabling the ‘add attachment’ feature.

Will the federal debarment (sam.gov) status check include a status on the purchase request/purchase order (PR/PO) history?
There are no integrations to any of the sources to perform debarment status validations in the system. Debarment check will be performed as they are today. The only change we would have is a debarment status on the supplier record that can be updated by a Supplier Ops person and internal State users will have the ability to check the supplier record to see if a supplier has been flagged on a debarment list (DAS, DOT, OFCC, SOS, Federal SAM, HHS).

Who, other than the supplier, will be notified automatically when a purchase order (PO) is dispatched?
Currently, only the supplier in notified upon a purchase order dispatch.

There are payment options on a purchase request (PR) such as EFT and CHK in OAKS that dictate how the supplier will be paid. Will the Fiscal Approver be able to update payment options on a PR as it goes through workflow.
The Payment type is brought over from OAKS on the supplier record and the Fiscal Approver will have the ability to change the defaulted value via a drop down on the purchase request (PR).

FEBRUARY 2019

What Catalogs exist today (R1)? What Contracts/Catalogs will be implemented in R2?
The current list of catalogs is on the front page of the eProcurement system. All DAS active contracts will be included in R2 (listed on Procurement website). All catalogs are fully loaded (not partial). Restricted language is small below items.
Does eProcurement have a separate eSignature software they are introducing to replace the current State software?
No, eProcurement does not have a separate eSignature software. The State's current enterprise eSignature software (OneSpan Sign) State will integrate with eProcurement.

How will the Controlling board request work? Will the two systems integrate or will it be done thru OAKS? Does this impact the associate term release and permit (are release and permits go ahead)?
These decisions are all on the list of integrations for R2.

Will there be a centralized place for the auditor to audit Pcard and PO's/procurement and purchases?
OMB reviews Pcard transactions in OAKS currently. The eMarketplace should have information available for review by either OBM or an Auditor regarding P-card transactions and Purchase Orders.

Will controlling Board Requests interface with the current system for the state?
This enhancement is on the list of integrations for R2.

When will top/all IT vendors be available in eProcurement?
The IT purchasing workflow will be in eProcurement.

Will OBM's documentation platform for Pcard be available with R2?
The design team is looking at these processes in R2 so it is still to be determined.

Will Pcard logs still be required for R2 release?
The design team is looking at these processes in R2 so it is still to be determined.

How does the quoting process work? (multiple quotes)
R2 will introduce an exciting new feature called "Quick Quotes". The design team is looking at this process, so the details about how it will work are still to be determined.

Currently, Asset Management exists in OAKS. Is this changing?
Asset Management will remain in OAKS. The project team is determining which Agencies are utilizing it and which integrations are currently in place.

How will the roles work with DAS? Will agencies need to have a procurement manager in addition to DAS?
This is TBD based on design in R2 & R3.

Will suppliers without state contracts be loaded into the system as a punchout catalog?
Suppliers without state contracts will have the ability to do hosted or punchout catalogs based on their capability.
Will specific Supplier data from Inteleview be moved over to the new system? There is the opportunity to convert data into eProcurement. Pulling from the RFP/design principle, we will work toward standardization in processes which should encompass existing processes into eProcurement.

Is Release and Permit in R2? Currently, there are two (one that is DAS and one that is OIT.) Yes, DAS is working to move both functions into eProcurement if possible. More will be decided after the R2 design sessions.

What is going to happen with Forms (such as purchase request form) that are currently in use and are specific to Agencies? There is the opportunity to convert data into eProcurement. Pulling from the RFP/design principle: we will work toward standardization in processes which should encompass existing processes into eProcurement.

Has there been consideration for the timing of UAT and testing activities during a very busy fiscal time for agencies? The project team restructured the delivery model after receiving feedback. The change was made in order to minimize contention for State resources, and accommodate an OAKS blackout period during the latter half of May and the entire month of June, 2019. Additionally, to allow State staff to perform standard business functions related to the change in biennium and fiscal year closeout activity, the new plan seeks to minimize State resource load during the first half of July 2019.

Will users get a timeout if they are out in a punchout catalog and have to walk away? Punchout timeouts are managed individually by each supplier, so depending on what they've set as the timeout time, a user could lose their punchout cart if they walk away prior to punching back in to Ohio eProcurement.

Does ODX force a time out (so you continue working and but no longer signed in)? Ohio eProcurement's timeout is set at 30 minutes, while ODX's is a little less. If you are in Ohio eProcurement while ODX times out, you will not be kicked out of Ohio eProcurement.

DECEMBER 2018

How do I access/link to the eProcurement solution? As an Early Adopter Agency, the eProcurement solution will be available on Monday 12/17 via MyOhio>My Workspace>Applications>Apps. The tile is called Ohio |eProcurement with a subtitle of eMarketplace.
As an Initial Supplier Partner, you will receive an email with a link to access eProcurement. Login information will also be included in Quick Reference Guides (QRGs). Initial Supplier Partners can also reach Ohio eProcurement at: www.supplier-emarketplace.ohio.gov

**Where can I find training?**
All eProcurement training for Early Adopter Agencies is web-based and is available through the State’s Enterprise Learning Management (ELM) system (OhioLearn for ODOT). Please access your ELM and search by keyword eProcurement to find all associated training modules.

For suppliers, all training including videos and quick reference guides can be found at https://das.ohio.gov/Divisions/General-Services/Procurement-Services/eProcurement

**Can I take training for eProcurement/eMarketplace if I am not in an early adopter agency?**
Currently, training will only be available to Pcard users who have been identified by the Early Adopter Agencies. However, to learn more about the eProcurement solution, video demos are available at: https://das.ohio.gov/Divisions/General-Services/Procurement-Services/eProcurement

**Which Catalogs are available in the eMarketplace?**
A list of currently available catalogs as well as catalogs that are coming soon can be found on the home page of the eProcurement solution when you log in.

**Can I save items that I purchase frequently?**
Yes, there is a feature within the eProcurement solution that allows you to save frequent purchases as a favorite, making future ordering more efficient and streamlined.

**Does my supplier automatically send me an order confirmation?**
Suppliers are trained to acknowledge orders by coming into eProcurement to generate that acknowledgement. This is not mandatory but a best practice which we encourage suppliers to follow. All supplier training Quick Reference Guides are available at: https://das.ohio.gov/Divisions/General-Services/Procurement-Services/eProcurement

**How do I cancel an order I made in the eMarketplace?**
If you need to modify (e.g. edit or cancel) to a submitted Pcard order, you will need to contact the Supplier directly to modify the order at this time. More robust features will be
deployed in future eProcurement releases, which will include abilities to modify and cancel orders.

**Will eProcurement allow me to order multiple items from separate contracts?**
The eProcurement solution will allow you to purchase multiple items from multiple suppliers in a single shopping transaction. The eProcurement solution will automatically send a Pcard orders to each respective supplier.

For example, when ordering multiple items from 2 different vendors like paint from Sherwin Williams and bolts from Fastenal in the same shopping cart, 2 separate orders will be generated: one order to Fastenal and one order to Sherwin Williams. The orders will result in 2 separate payment card (Pcard) transactions.

**Will eProcurement allow me to purchase an item that is on a CRP but is still available from an MBE contract?** For example, can I still order sticky notes on GBEX’s site, even though I am required to order them through the Cincinnati Association for the Blind?
By design, the eProcurement solution will require you to attach a justification document to the requisition before these types of orders can be submitted. Per the Ohio Revised Code, goods and services that are available from Requisite Procurement Programs like CRP must be purchased from those Programs unless a waiver is obtained. Once a justification document is attached, the eProcurement solution not block you from making that purchase. The system is designed to recognize when a user attempts to purchase goods and services that are also provided by Requisite Procurement Programs like CRP, to ensure that users are aware of this and making purchases from them whenever possible.

**How will Pcard holders know what Organization to select when making a purchase?**
Pcard holders will only see the Organization(s) to which they belong or purchase on behalf of. The only users who will see multiple Organizations are those from DRC/DYS who share services.

**Can I add attachments or delete attachments when I make a purchase? Can supervisors, coworkers or fiscal add or delete attachments?**
For this release, only the Pcard holder can add and remove attachments.

**What file types will be accepted as attachments?**
Acceptable attachment types in the eProcurement solution include some of the most common file types like PDF, Excel, and Word.
What is the default delivery address for Pcard holders associated with multiple addresses (e.g., Pcard holders in an agency with a centralized procurement office)? How are the default addresses determined?
There is no default Delivery Address pre-identified on the Requisitioner’s profile. Requisitioners can establish or update a default Delivery Address on their profile at any time.

Will Pcard holders be able to select a delivery address that is not an agency address?
Users will be able to select any agency address, not just the addresses for their agency. Users will also be able to add a delivery address not already in the eProcurement solution, which will require approval from an Agency Administrator before the order can be submitted and sent to the supplier. Work is in progress to provide the ability to limit the addresses based on Agency in the next release.

Can managers who are not Pcard holders get in the eMarketplace to view worklist, history, reports, etc.?
For Release 1, only Agency Administrators and Early Adopter Agency Pcard holders can access the eProcurement solution to view purchases and limited, “out of the box” reports.

What if an order is for a total of $4,200 with two Suppliers- one for $1,500 and the other for $2,700. Will the $1,500 requisition be approved and processed, while the other one is denied for being over the $2,500 transaction limit? Or will the whole order fail?
The $2,500 single transaction limit in eMarketplace will work as follows: if a user attempts to submit a requisition and create an order with a single supplier that totals more than $2,500, they will receive a blocking alert that prevents the creation of that order. In the example above, the whole order would fail as it is considered one transaction in the eProcurement solution. The order line that is over the $2,500 limit must be corrected to clear the blocking alert.

What’s the difference between eMarketplace and eProcurement?
eProcurement is the solution all users will log on to perform procurement activities based on their security role (e.g., manage solicitations and contracts, approve requisitions, look up orders, build reports, etc.). eMarketplace is the shopping
environment where all catalog content is housed, and users can select items to purchase.

**What exactly will I be able to do in eMarketplace this December?**
As a Payment Card (Pcard) holder, you will be able to search for commonly purchased items in the eMarketplace catalog environment and place an order for those items using your Pcard.

**My agency has a procurement process in place that works. Why are we doing this?**
Across the State, agencies have separate processes for procurement which makes it challenging to analyze overall State spending and purchasing habits. In addition, suppliers have difficulty learning these various processes across agencies. Going forward, eProcurement will provide a standard way to do business with the State.

**How will I be trained?**
For the December eProcurement release, all training will be web-based and available through the State’s Enterprise Learning Management (ELM) system (OhioLearn for ODOT). In addition, Early Adopter Agencies are scheduling follow-up meetings to answer any questions before go-live.

**Some agencies currently complete a DAS Pcard log, will my agency still need to do that if they are doing it today?**
For the first release in December, Pcard logs are still required to be completed because there is no integration with any other State system. The project team will be exploring ways to reengineer this process during the full Order-to-Pay release in 2019.

**How do I use eMarketplace without OPI items included?**
Items available from OPI will be included in a later release. Through the first eProcurement release, please follow your standard procedures for requesting items from OPI. The project team is working with all requisite programs during this release to understand which goods/services they provide, and an alert will be generated in the system if a user attempts to order something that might be provided by a requisite procurement program. Users will need to attach a waiver confirming that the requisite procurement program cannot fulfill their need before they are able to proceed.

**What will change for people in my department who put in a request for an item to be purchased? For example, my group asks the group administrator to purchase the items we need. Do I need to begin using eProcurement myself?**
Existing processes for requesting items for purchases can continue until the full Order-to-Pay release goes live in 2019. Only Pcard holders need to be in the eProcurement solution to make purchases during the first eProcurement release.

**Will the existing contracts still be accessible outside eProcurement?**
Yes, contract price lists will continue to be available on the procurement website. In addition, some contracts also have item information in OAKS, which will also still be available. The current processes used to retrieve contract information will be maintained since not all agencies are entering eProcurement at this time.

**Will my PCard transactions have to be approved before I can purchase?**
Existing processes to approve a Pcard purchase prior to placing an order will continue outside of eProcurement. These processes will be moved to eProcurement during the full Order-to-Pay release in 2019.

**Will the system tell me if my Pcard is over its limit?**
The eProcurement system does not track any bank information in regard to Pcards, so there is no alert mechanism for a card that has reached a spending limit. When the full Order-to-Pay release goes live in 2019, eProcurement will not permit transactions costing more than $2,500 (with the suppliers available in the eMarketplace).

**What types of supplies are going to be available in the eMarketplace in December?**
Examples of the types of goods and services that will be available for purchase in December are batteries, clothing, eSignature transactions, footwear, general hardware, gloves, ink and toner cartridges, IT equipment pickup and disposal/delivery services, laboratory supplies, office supplies, soaps and hand sanitizers, and writing utensils.

**Is Travel included in the PCard purchases?**
Travel reservations and purchases are not part of the first iteration of the eProcurement solution through 2019.

**I don't have a PCard. Why am I getting updates about eProcurement?**
Early Adopter Agency Leads have worked with their Agency’s Organizational Change Management practitioner to develop a communications strategy for their particular agency. Some agencies may choose to broadcast information to a wider audience than eProcurement users impacted in December 2018. Additional users will be added in later releases.

**Who can I talk to for details about what's changing for my group?**
Each Early Adopter Agency has a lead contact – the contact list can be found on the eProcurement website.

**OCTOBER 2018**

**What is the schedule for the eProcurement system releases?**
The first release of eProcurement - highlighting eMarketplace is targeted for December 2018. The larger scope of Order-to-Pay will happen in Summer 2019, Sourcing
Management in Fall 2019 and Contract Management with Spend Analysis at the end of 2019.

**What is an Early Adopter Agency?**
An Early Adopter Agency is a State Cabinet Agency that has agreed to lead the way on the new eProcurement system. They are willing to work through the new system challenges and potentially two ways of working in the short term. These agencies get to support the alignment of procurement processing for the State and realize the early benefits of standardization and transparency in procurement.

**What is the Central Design Group?**
This group represents half of the Early Adopter Group and includes agencies with the most complex procurement processes (often due to multiple locations). This team includes DAS, OBM, DOT, DMHAS, DPS and DRC. They are helping to develop the Core Model of procurement processes. The project team’s State Business Analysts are also included to represent the remaining Early Adopter Agencies and will work with those agencies to address their specific needs.

**What is the “Core Model”?**
The Core Model represents a set of procurement processes that are standardized across State agencies. This serves as a platform upon which the eProcurement solution can be commonly developed and efficiently deployed to meet the needs of Agencies, as well as local governments. The State’s “Core Model” is projected to represent close to 90% of the total solution and localizations to represent 10% or less.

**What is the Build Review group?**
The Build Review group is the other half of the Early Adopter Group with a focus on the more complex processes outlined by the Central Design Group. This group includes the Agencies that will review the first build of the eProcurement system to see how their complex processes were accommodated and determine what approval levels make sense for their Agency.

**Why didn’t all Early Adopter Agencies directly participate from the beginning?**
When mapping various processes into the Core Model, we know the larger the group participation the slower the design sessions will go. By working with the largest, most complex agencies first and including project team members who can also represent the smaller agency needs, the Central Design Group can stay small and work quickly within our tight project deadlines.

**How will other Agencies be included in the development process?**
Project leadership believes bringing in the remaining Agencies at the Build Review phase, when they can actually see the State-specific eProcurement system, will allow them to quickly understand how the standardized procurement processes work. At that time, if a requirement needs to be modified for an Agency’s need, it will be documented,
prioritized and addressed per the project’s change control process. This is the process that will be used as remaining Cabinet Agencies begin to participate in 2020.

**How much customization is required for eProcurement in Ohio?**
The first design principle discussed in every Design Session is “Configure first, customize second.” This helps the entire team stay focused on adapting processes that will allow for configuration both across the 90% Core Model and within the 10% of Agency-specific needs. This focus will help the platform remain stable, prevent a heavily-customized version of the software and increase sustainability.

**How can my Agency get involved now?**
Because of the aggressive timeline and Core Model approach, the project is not looking for additional participants. However, this is an ideal time for Agencies to take a look at their processes, make sure there is alignment across the Agency, confirm all processes are documented, and determine if there are areas of improvement that could be tackled now. Towards the end of 2019, the eProcurement State Project Team will begin reaching out to remaining Cabinet Agencies to discuss next steps in participation.

**How much time does an Agency Representative have to dedicate to the project?**
For the larger agencies who are participating in the Design sessions, they can expect to be in session Tuesday to Thursday weekly, then will switch to Build Review sessions on those same days. Immediately following Build Review, the Testing phase will begin, and sessions may be scheduled across full weeks. Smaller agencies, being mindful of their staff’s time, can expect a 3-day commitment during Build Review then Testing. These cycles will repeat for every release.

**What should I do if I have a question about the project?**
The eProcurement Project Team has created an email box to review any questions and connect the right team resource to answer it. Some common questions may become FAQs and posted to the project website. All questions should be sent to: eprocurement@das.ohio.gov