

State of Ohio

Vendor Portal User Instructions for IT and Non-IT Contracts

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Introduction

The State of Ohio Vendor Portal is intended to provide all the functionality a State Contractor will need to report both State and Local government generated revenue on a quarterly basis. If you are an IT (Information Technology) Vendor then use this site to upload your most current price list. If you are a non-IT Vendor, then please do NOT upload your price list on this web portal. If you experience any issues with this online application, then please contact and inform your analyst listed below.

- IT Contracts please contact Rose Perkins at 614-466-3605 or Rose.Perkins@das.ohio.gov
- Non-IT Contracts please contact Angie Stasiak at 614-466-4764 or das.statepurchasing@das.ohio.gov

Internet Browsers

The Vendor Portal will operate best with the following internet browser versions

- IE - v10.0 or higher
- Edge - v25.1 or higher
- Chrome - v52.0 or higher
- Firefox / Mozilla - v47.0.1 or higher
- Safari - v9.1.2 or higher

1.0 Logging into Vendor Portal

1.1 Navigate to <https://cm.ohio.gov>. The login dialog is shown in figure 1. Your vendor portal password is set up when a contract is awarded. Input your Username (email address) and Password. If you forgot your password or your login fails then proceed to Section 1.3 (Forgot Password)

The form validation requires that the password is filled in and correct for the user as shown in Figures 1 and 2. Once you have entered the correct credentials the browser will show the Vendor Portal page as shown in figure 3.

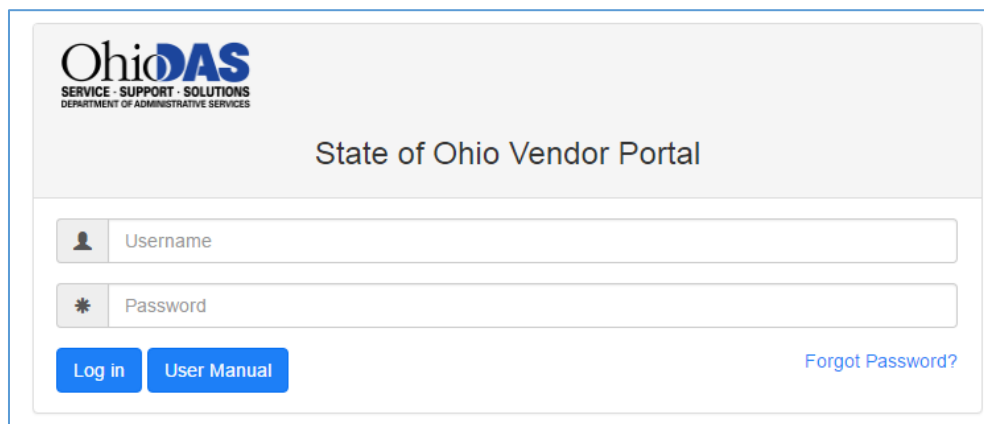
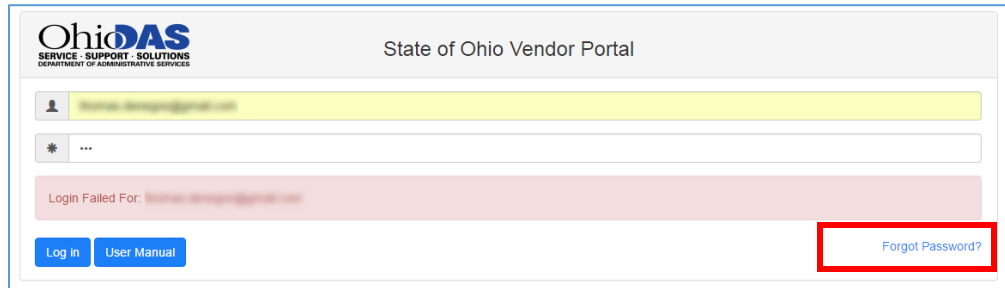


Figure 1- Vendor Portal Login Dialog

1.2 The screen show below will appear when the incorrect password has been entered.

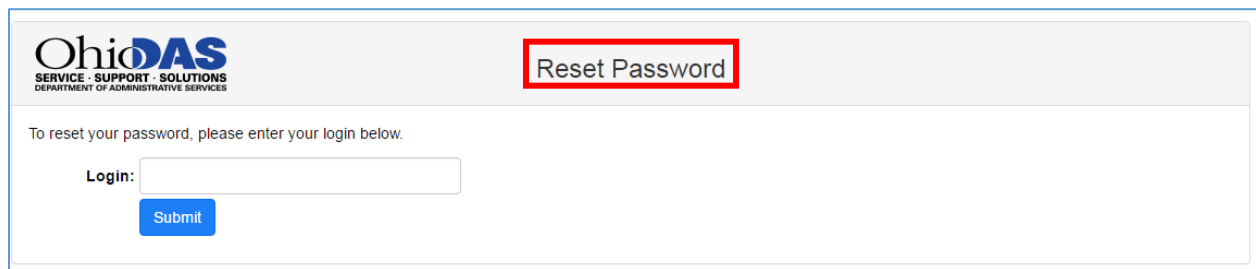


The screenshot shows the OhioDAS State of Ohio Vendor Portal login interface. At the top left is the OhioDAS logo. To its right is the text 'State of Ohio Vendor Portal'. Below the logo is a yellow input field for the username, which contains the text 'Vendor Support@ohio.gov'. Below that is a password input field with a red 'X' icon and three dots. A red error message 'Login Failed For: Vendor Support@ohio.gov' is displayed below the password field. At the bottom left are two blue buttons: 'Log in' and 'User Manual'. At the bottom right, a blue link 'Forgot Password?' is highlighted with a red rectangular box.

Figure 2 - Login Wrong Password

1.3 Forgot Password

In the event you forgot your password or you cannot access the portal, then use the ***Forgot Password*** function. Click the Forgot Password link as seen in Figure 2. The Portal will display the Reset Password screen seen in Figure 2.1. Enter your email address and click the Submit Button. An email will be sent to you. If your email address is not valid then contact your analyst for assistance.

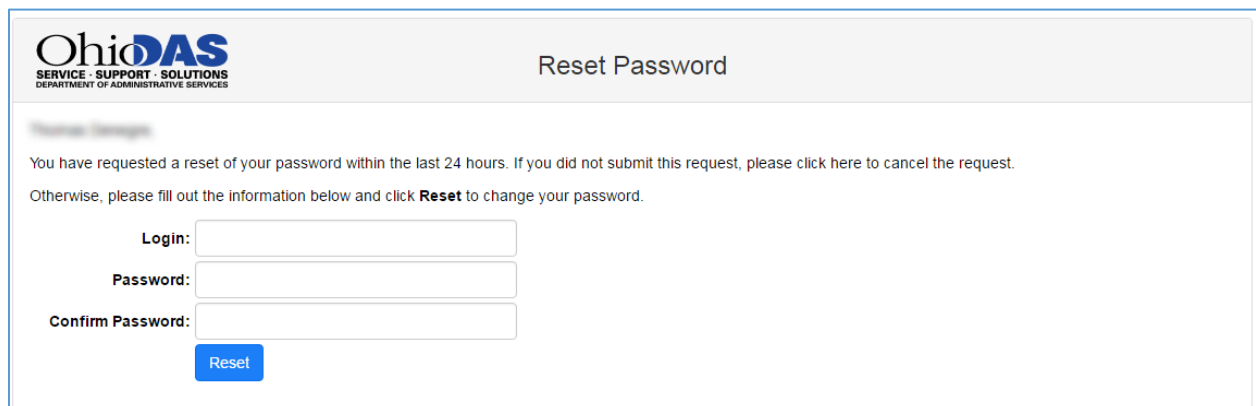


The screenshot shows the OhioDAS Reset Password screen. At the top left is the OhioDAS logo. To its right is a blue link 'Reset Password' highlighted with a red rectangular box. Below the logo is the text 'To reset your password, please enter your login below.' Below this text is a 'Login:' label followed by a text input field. Below the input field is a blue 'Submit' button.

Figure 2.1 – Reset Password Part 1

1.4 Reset Password

When you receive your email click the link. This will direct your browser to reset your password (See Figure 2.2). Input your email address and new password (twice to confirm). After you successfully reset your password, the portal will direct you to the login page. Please login with your new password.



The screenshot shows the OhioDAS Reset Password screen. At the top left is the OhioDAS logo. To its right is the text 'Reset Password'. Below the logo is a redacted email address. Below the email address is the text 'You have requested a reset of your password within the last 24 hours. If you did not submit this request, please click here to cancel the request.' Below this text is the text 'Otherwise, please fill out the information below and click **Reset** to change your password.' Below this text are three input fields: 'Login:', 'Password:', and 'Confirm Password:'. Below the 'Confirm Password:' field is a blue 'Reset' button.

Figure 2.2 – Reset Password Part 2

When you have successfully logged into the portal, you will be directed to the screen below displaying information on your organization. Please note that the Upload New Price List is only for IT Contractors and their relevant price list. If you are not an IT Contractor, then please do NOT upload your price list.

State of Ohio Vendor Portal

Report Revenue Upload New Price List Instructions Price List Template Obligations

Vendors

CONTRACT SYSTEMS, INC.

Formal Address			Postal Address		
Street / Building			Street / Building		
Additional Address Information			Additional Address Information		
Suite 200			Suite 200		
City	State	Zip Code	City	State	Zip Code
Dublin	OH	43016	Dublin	OH	43016
Country			Country		
UNITED STATES			UNITED STATES		

CONTRACT: [REDACTED]

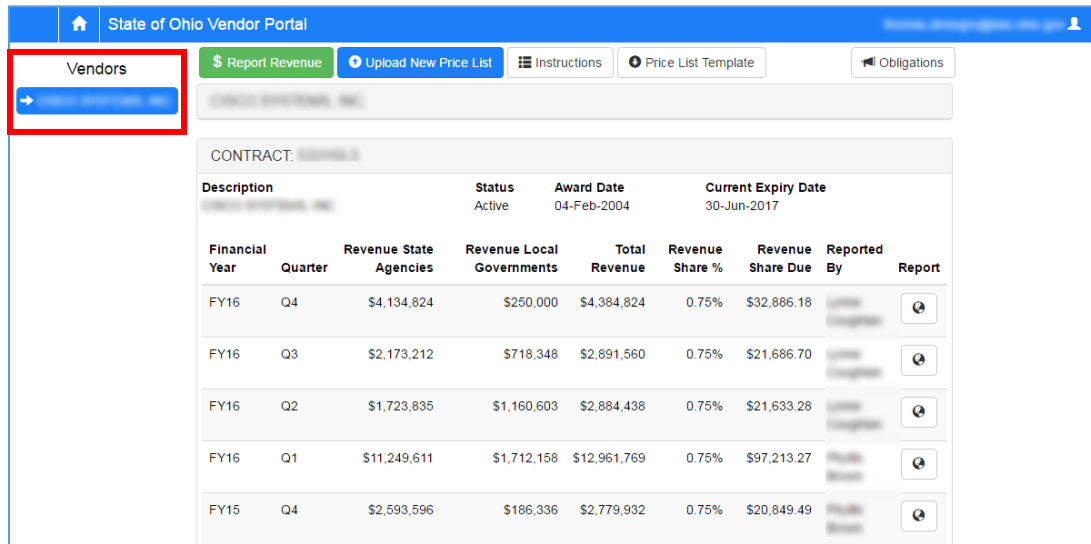
Uploaded Price Lists

Figure 3 - Vendor Portal Page

Clicking on a tab
will expand or
collapse them.

2.0 Page Features – Overview

2.1 On the left-hand side of the screen is the list of vendors this person is a contact for.

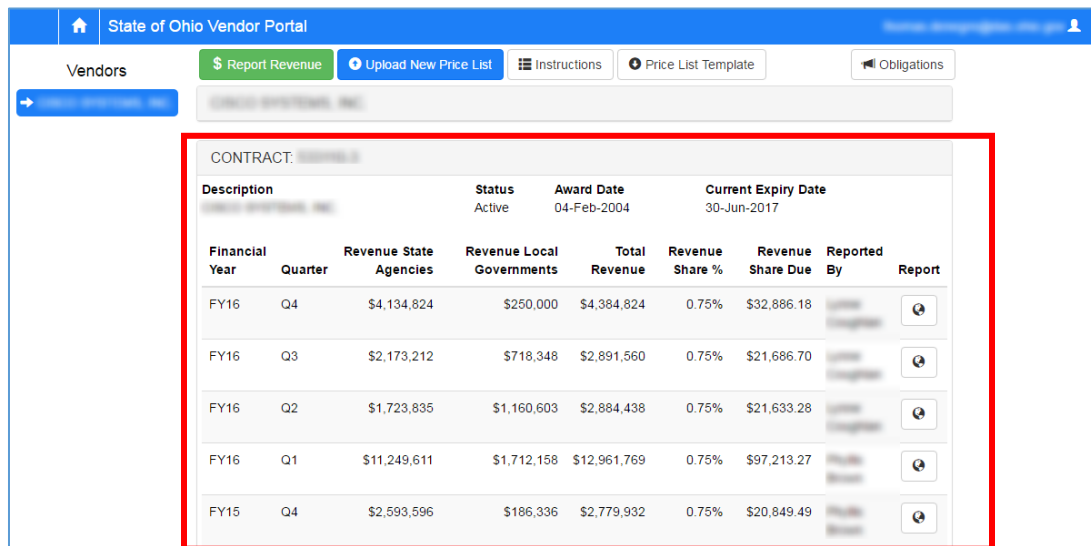


The screenshot shows the 'State of Ohio Vendor Portal' interface. On the left, a sidebar contains a 'Vendors' section with a red box highlighting a list of vendor names. The main content area displays a table of contract revenue data for a selected vendor. The table includes columns for Financial Year, Quarter, Revenue State Agencies, Revenue Local Governments, Total Revenue, Revenue Share %, Revenue Share Due, Reported By, and Report. The data is organized by contract, with each contract having multiple rows representing different financial years and quarters.

CONTRACT: [Contract Name]								
Description	Status	Award Date	Current Expiry Date					
[Contract Description]	Active	04-Feb-2004	30-Jun-2017					
Financial Year	Quarter	Revenue State Agencies	Revenue Local Governments	Total Revenue	Revenue Share %	Revenue Share Due	Reported By	Report
FY16	Q4	\$4,134,824	\$250,000	\$4,384,824	0.75%	\$32,886.18	[Name]	[Icon]
FY16	Q3	\$2,173,212	\$718,348	\$2,891,560	0.75%	\$21,686.70	[Name]	[Icon]
FY16	Q2	\$1,723,835	\$1,160,603	\$2,884,438	0.75%	\$21,633.28	[Name]	[Icon]
FY16	Q1	\$11,249,611	\$1,712,158	\$12,961,769	0.75%	\$97,213.27	[Name]	[Icon]
FY15	Q4	\$2,593,596	\$186,336	\$2,779,932	0.75%	\$20,849.49	[Name]	[Icon]

Figure 4 - List of Vendors this person is a contact for.

In the center is core company information.



The screenshot shows the same 'State of Ohio Vendor Portal' interface. A red box highlights the core company information table, which is identical to the one in Figure 4. The table provides detailed financial data for the selected vendor, organized by contract and financial year/quarter.

CONTRACT: [Contract Name]								
Description	Status	Award Date	Current Expiry Date					
[Contract Description]	Active	04-Feb-2004	30-Jun-2017					
Financial Year	Quarter	Revenue State Agencies	Revenue Local Governments	Total Revenue	Revenue Share %	Revenue Share Due	Reported By	Report
FY16	Q4	\$4,134,824	\$250,000	\$4,384,824	0.75%	\$32,886.18	[Name]	[Icon]
FY16	Q3	\$2,173,212	\$718,348	\$2,891,560	0.75%	\$21,686.70	[Name]	[Icon]
FY16	Q2	\$1,723,835	\$1,160,603	\$2,884,438	0.75%	\$21,633.28	[Name]	[Icon]
FY16	Q1	\$11,249,611	\$1,712,158	\$12,961,769	0.75%	\$97,213.27	[Name]	[Icon]
FY15	Q4	\$2,593,596	\$186,336	\$2,779,932	0.75%	\$20,849.49	[Name]	[Icon]

Figure 5 - Core Company information

2.2 Click on the Contract tab at the bottom of the Vendor Portal landing page to view the contract information as shown in Figure 6 below.

State of Ohio Vendor Portal

Vendors

Report Revenue

Upload New Price List

Instructions

Price List Template

Obligations

CONTRACT: 533110-3

Description	Status	Award Date	Current Expiry Date
533110-3	Active	04-Feb-2004	30-Jun-2017

Financial Year	Quarter	Revenue State Agencies	Revenue Local Governments	Total Revenue	Revenue Share %	Revenue Share Due	Reported By	Report
FY16	Q4	\$4,134,824	\$250,000	\$4,384,824	0.75%	\$32,886.18		
FY16	Q3	\$2,173,212	\$718,348	\$2,891,560	0.75%	\$21,686.70		
FY16	Q2	\$1,723,835	\$1,160,603	\$2,884,438	0.75%	\$21,633.28		
FY16	Q1	\$11,249,611	\$1,712,158	\$12,961,769	0.75%	\$97,213.27		
FY15	Q4	\$2,593,596	\$186,336	\$2,779,932	0.75%	\$20,849.49		

Figure 6 - Previously Reported Revenue & Contract information

2.3 Click on the Uploaded Price Lists tab at the bottom of the Vendor Portal landing page to view the previously uploaded price list files as shown in Figure 7 below.

State of Ohio Vendor Portal

Vendors

Report Revenue

Upload New Price List

Instructions

Price List Template

Obligations

CONTRACT: 533110-3

Uploaded Price Lists

Contract ID	Valid From	Price List	Certification	Status	Uploaded On	Uploaded By	Report
533110-3	17-Aug-2016	20160812_OH_STS_Price_List.xlsx	201608_Certification of Prices Letter_OH.pdf	Pending Acceptance	17-Aug-2016		

Figure 7 - Previously uploaded price list files

3.0 Reporting Revenue

3.1 Click on the **“Report Revenue”** button shown in Figure 8 in order to open the Report Revenue Dialog box.

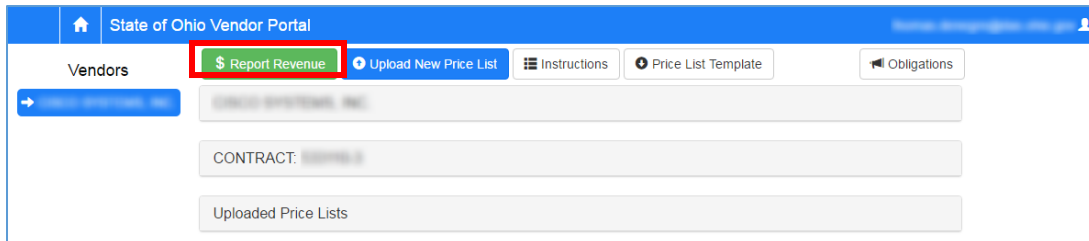


Figure 8 - Button to Show the Report Revenue Dialog

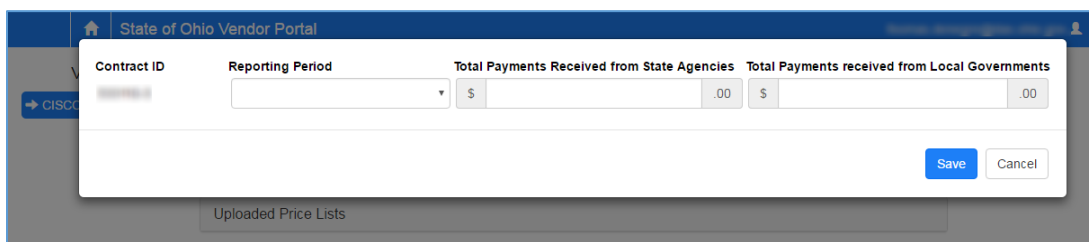


Figure 9 - Report Revenue Dialog

3.2 Navigate to **“Reporting Period”** dropdown menu on the Report Revenue Dialog box, as shown in Figure 10 below. Click on the **“Reporting Period”** dropdown menu. Select the appropriate **“Reporting Period”** from the options available from the list.

Figure 10 - Financial Year & Quarter Selection

Once the Reporting period is selected, the Report Revenue Dialog box will look like the image below.

3.3 Navigate to **“Total Payments Received from State Agencies”** textbox on the Report Revenue pop up page. Enter the appropriate amount in the **“Total Payments Received from State Agencies”** textbox. The Total Payments Received from State Agencies is entered. These amounts are whole amounts only. There are no decimals used for cents.

3.4 Navigate to **“Total Payments Received from Local Governments”** textbox on the Report Revenue pop up page. Enter the appropriate amount in the **“Total Payments Received from Local Governments”** textbox. The Total Payments Received from Local Governments is entered.

Contract ID	Reporting Period	Total Payments Received from State Agencies	Total Payments received from Local Governments
534067	Q4 2016: Apr-Jun 2016	\$ 230000 .00	\$ 150000 .00

3.5 Navigate to **“Save”** Button on the Report Revenue pop up page. Click on the **“Save”** Button.

Contract ID	Reporting Period	Total Payments Received from State Agencies	Total Payments received from Local Governments
534067	Q4 2016: Apr-Jun 2016	\$ 230000 .00	\$ 150000 .00

The information entered will be saved and displayed under the **“Contract”** tab. After you have saved it, the Test Script is successful.

State of Ohio Vendor Portal									
Vendors		\$ Report Revenue		Upload New Price List		Instructions		Price List Template	
Obligations									
CONTRACT: 533110-3									
Uploaded Price Lists									
Contract ID	Valid From	Price List	Certification	Status	Uploaded On	Uploaded By	Report		
+ New File									
533110-3	17-Aug-2016	20160812_OH_STS_Price_List.xlsx	Upload Certification	Pending Acceptance	17-Aug-2016				

Figure 11 - Expected outcome

4.0 Downloading price list template for IT Contracts only

4.1 Click on the **“Price List Template”** button as seen in Figure 12 below. You will get a pop up asking “Do you want to open or save the template?” Click **“Open”** to view the price list and click **“Save”** to save the file to your computer. (*Note: Only for IT-Price Lists Only*)

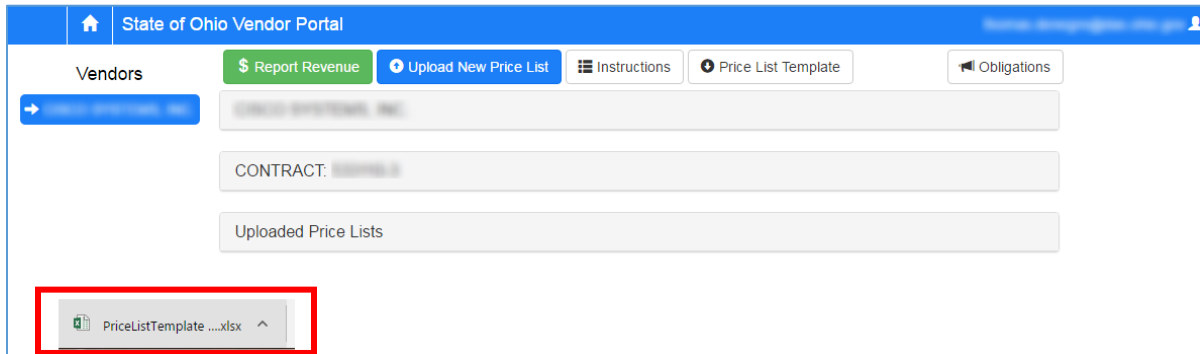


Figure 12 - Download Price List Template

5.0 Uploading price lists for IT Contracts only

5.1 Navigate to **“Upload New Price List”** Button on the Vendor Portal Landing page. Click on the “Upload New Price List” Button. The **“Upload New Price List”** pop up page will be displayed.

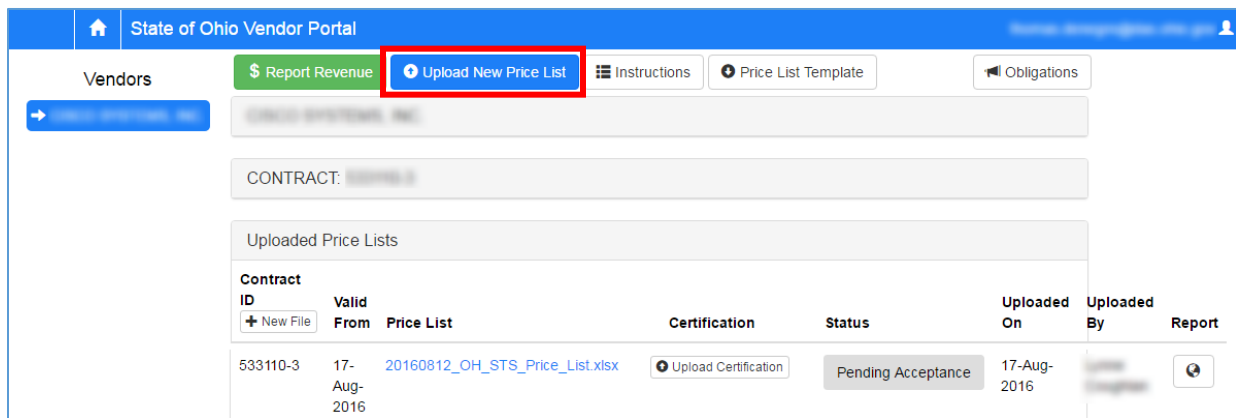


Figure 13 - Price List Upload button

5.2 Navigate to “**Contract ID**” dropdown menu on the Upload New Price List pop up page. Click on the “**Contract ID**” dropdown menu. Select the appropriate “**Contract ID**” from the options available from the list. The Contract ID is selected.

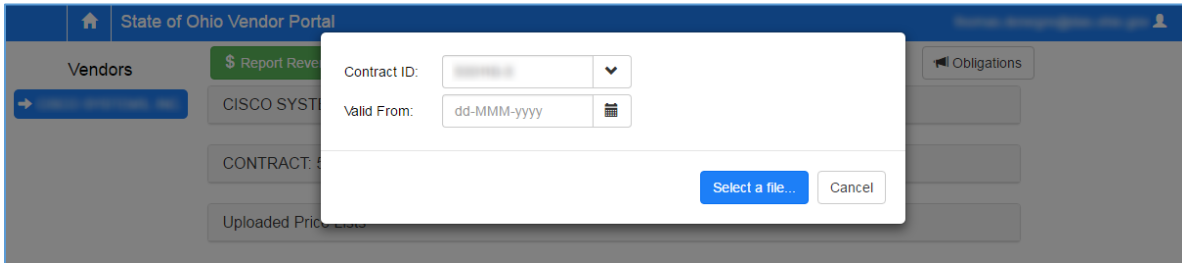


Figure 14 - Price List Upload dialog

5.3 Navigate to “**Valid From**” Date Picker on the Upload New Price List pop up page. Click on the “**Valid From**” Date Picker. Select the appropriate “**Date**” from the Date Picker. The Valid from Date is selected.

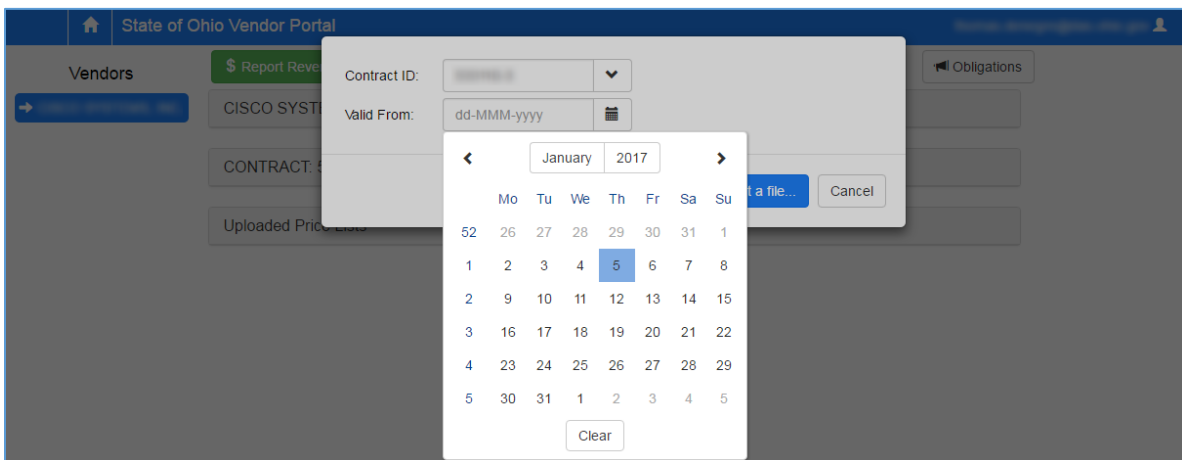
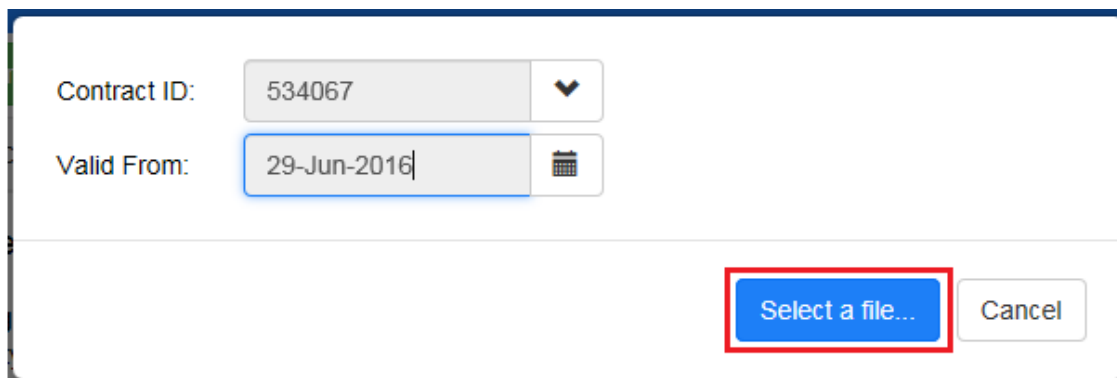


Figure 15 - Price List Date picker

5.4 Navigate to **“Select a file”** Button on the Upload New Price List pop up page. Click on the **“Select a File”** Button.

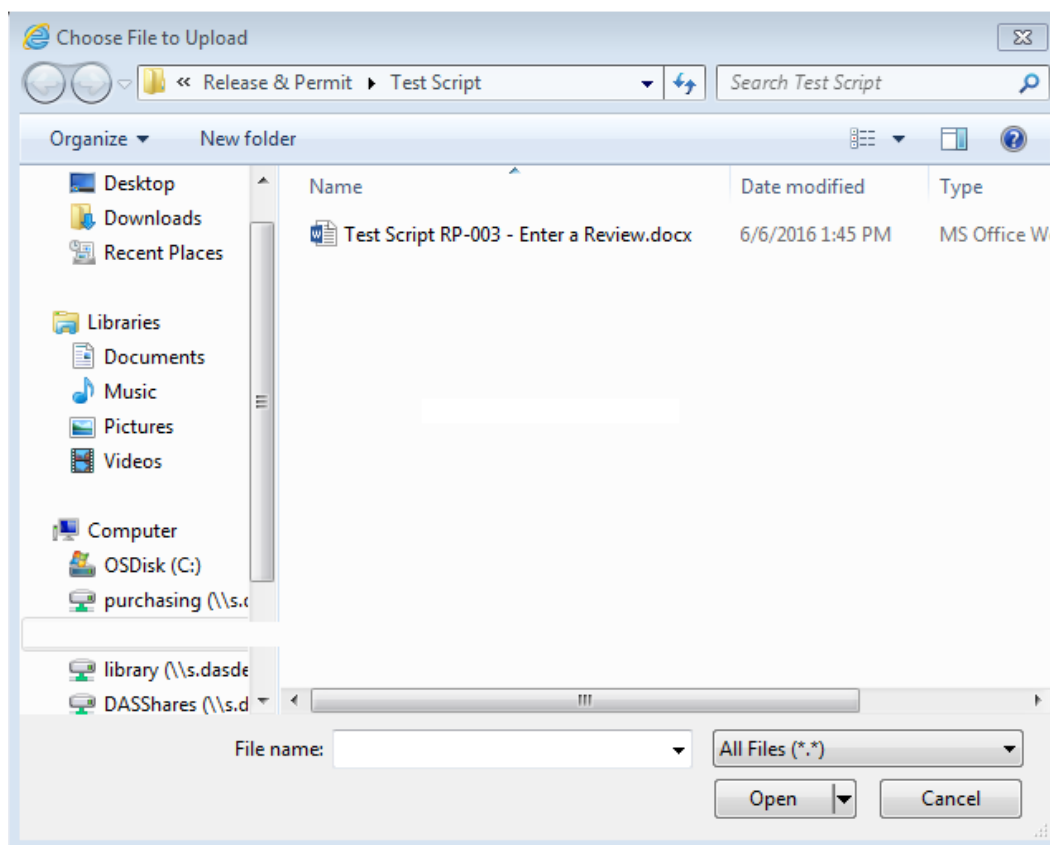


Contract ID: 534067

Valid From: 29-Jun-2016

Select a file... Cancel

5.5 The Windows browser will be displayed. Navigate to the appropriate price list, select it, and click the Open Button so it can be uploaded into the Portal.



State of Ohio Vendor Portal

Vendors

Report Revenue Upload New Price List Instructions Price List Template Obligations

CONTRACT: 533110-3

Uploaded Price Lists

Contract ID	Valid From	Price List	Certification	Status	Uploaded On	Uploaded By	Report
533110-3	17-Aug-2016	20160812_OH_STS_Price_List.xlsx	Upload Certification	Pending Acceptance	17-Aug-2016		

Figure 16 - Price List File Location

5.6 The Price List will be saved and will be displayed under the **“Uploaded Price Lists”** tab with the status of **“Imported”**. After this step, the Test Script is successful. Once the pricelist has been uploaded it will show an upload status for the Vendor. If the pricelist has errors in it, then the status will show failed. The Vendor will receive an email that indicates where there are errors in the pricelist. If the Vendor cannot figure out how to fix the errors in their pricelist, they should contact Jim Sutton via email jim.sutton@oit.ohio.gov. In their email they should attach the error message that was sent to them via email.

State of Ohio Vendor Portal

Vendors

Report Revenue Upload New Price List Instructions Price List Template Obligations

CONTRACT: 533110-3

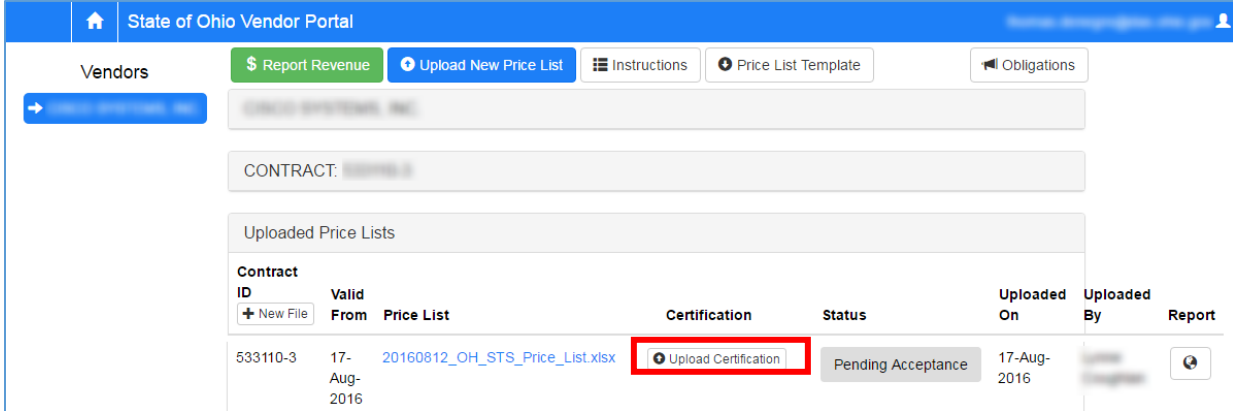
Uploaded Price Lists

Contract ID	Valid From	Price List	Certification	Status	Uploaded On	Uploaded By	Report
533110-3	17-Aug-2016	20160812_OH_STS_Price_List.xlsx	Upload Certification	Pending Acceptance	17-Aug-2016		

Figure 17 – Uploaded Price List

6.0 Uploading your IT-Price List Certification Letter

6.1 To upload a new certification which guarantees your current IT-price list, scroll down and click on the button shown in Figure 18 that says **“Upload Certification”**.



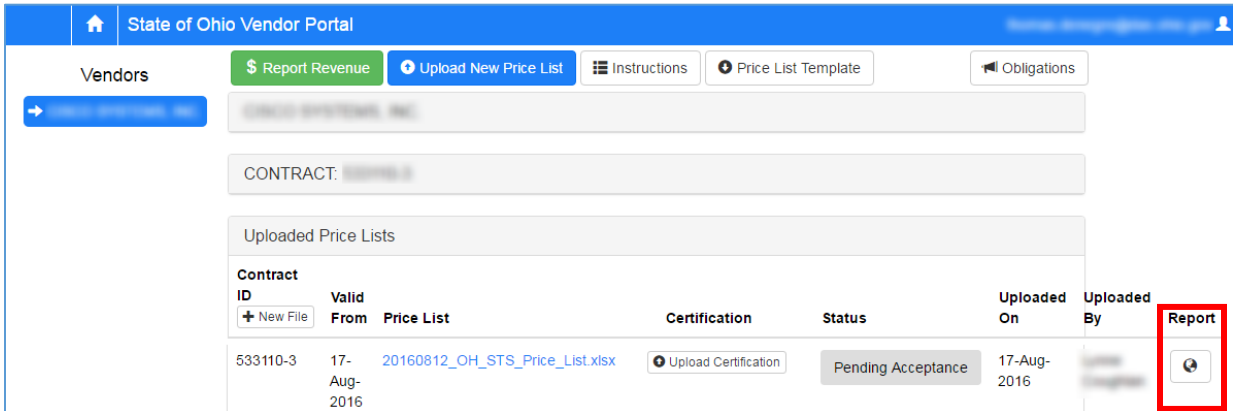
The screenshot shows the 'State of Ohio Vendor Portal' interface. At the top, there are navigation tabs: 'Report Revenue', 'Upload New Price List', 'Instructions', 'Price List Template', and 'Obligations'. Below these, there's a section for 'Vendors' with a dropdown menu. The main content area displays 'Uploaded Price Lists' for a specific vendor and contract. A table lists the uploaded price lists with columns: Contract ID, Valid From, Price List, Certification, Status, Uploaded On, Uploaded By, and Report. The first row shows a price list for contract 533110-3, valid from 17-Aug-2016, with the file name '20160812_OH_STS_Price_List.xlsx'. The 'Certification' column for this row contains a button labeled 'Upload Certification', which is highlighted with a red rectangle. The 'Status' column shows 'Pending Acceptance'.

Contract ID	Valid From	Price List	Certification	Status	Uploaded On	Uploaded By	Report
533110-3	17-Aug-2016	20160812_OH_STS_Price_List.xlsx	Upload Certification	Pending Acceptance	17-Aug-2016		

Figure 18 - Certification File upload Button

7.0 Quarterly Sales Report

7.1 Click on the “Report” icon to open the Quarterly Sales Report.



This screenshot is identical to the one in Figure 18, showing the 'State of Ohio Vendor Portal' interface with the 'Upload Certification' button highlighted. However, in this version, the 'Report' column header and its corresponding icon (a circular arrow) are highlighted with a red rectangle, indicating the next step in the process.

Contract ID	Valid From	Price List	Certification	Status	Uploaded On	Uploaded By	Report
533110-3	17-Aug-2016	20160812_OH_STS_Price_List.xlsx	Upload Certification	Pending Acceptance	17-Aug-2016		

Figure 19 - Price List Report Button

7.2 Once the “Report” icon is selected, the screen below will appear. Print the report in order to add to remittance.

Quarterly Sales Report and Revenue Share Remittance

Fiscal Year 2017, First Quarter (July through September, 2016)

For InsightETE Corporation

This report to the Department of Administrative Services represents sales activities and payments received for the contract(s) listed below for political subdivisions/local governments respectively as required by contract terms and conditions for State Term Schedule (STS), Master Cloud Services Agreements (MCSA), Master Services Agreements (MSA), Master Maintenance Agreement (MMA), Master License Agreement (MLA), Competitive contracts and Office of Procurement from Community Rehabilitation Programs (CRP) contracts.

Contract Number	Speedchart	Total Payments Received from State Agencies	Total Payments Received from Political Subdivisions/Local Governments	Total Revenue Reported by Contract Number	Revenue Share Percentage	Revenue Share Due
534026	DASITRVSHR	\$10	\$50,000	\$50,010	0.0075	\$375.07
Total Revenue Share Due (please remit the amount):						\$375.07

Payment is due in full within 30 days after the end of the applicable reporting period.

<p>If Revenue Share Due is greater than zero (0), please print this form and mail it with your payment to:</p> <p>Department of Administrative Services L-3686 Columbus, Ohio 43260-3686</p>	<p>For overnight deliveries, please print this form and mail it with your payment to:</p> <p>Huntington National Bank 7 Easton Oval ATTN: L-3686 Columbus, Ohio 43219</p>
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Please make check payable to: Treasurer, State of Ohio

For all supporting documentation outside of this revenue share remittance, please send to the specified address located within the terms and conditions section of your contract.

NOTE: If Revenue Share Due is zero (0), there is no need to mail this report. Your company's reporting obligation is satisfied by filing your report on the Ohio Contract Management Portal web site.

Figure 20 - Remittance Report