OhioBuys Connecting Buyers and Suppliers

Bidder and Supplier Learner Guide Getting Started in OhioBuys

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If you have questions or need additional assistance, please contact Ohio Shared Services Contact Center via email (<u>OBM.SharedServices@OBM.ohio.gov</u>) or phone (877-644-6771).

In This Document:

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

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.

Functionality Covered:

- 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 OhioBuys public portal. In order to bid, a Bidder will need to create an OH|ID and complete a brief Bidder Registration Request.
- 2) Accessing OhioBuys as an Existing Supplier: Suppliers who are currently doing business with the State do not need to re-register in order to access OhioBuys. 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):

Functionality Covered:

- General Navigation: Explains the structure and content of OhioBuys 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 OhioBuys, 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

Overview:

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

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

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

To begin this process, navigate to https://ohiobuys.ohio.gov/ and click OhioBuys Log In.

Welcome to Ohio Buys
Experimentation of the 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. Ohio Buys Log In
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.
Public Solicitations Public Contracts
Public Catalog Public Records Procurement Opportunities Supplier Portal for Financial Registration Supplier Portal Supplier Portal

If you do not currently have an OH|ID, click **Create Account**, otherwise enter your login credentials 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 OhioBuys user.
- If you already have an OH|ID, proceed to Step 8.

How to Register as a New Bidder

	Step-by-Step Instru	uctions for Registering as a New Bidder
3	 Email Verification Personal Info Pick a Username Create Password Account Recovery Terms & Conditions First, enter your email address in	Email Verification With one OH/ID account, you can sign in to multiple State of Ohio agency systems more securely. We need to verify the email address you want to use for your OH/ID account. A one-time PIN will be emailed to the email address of the secure of the s
4	Create OH ID Account mail Verification Personal Info Personal Info Personal Info Personal Info Create Password Account Recovery Coreate Password Create Password Create Password Create Conditions Terms & Conditions	<image/>
5	Create OH ID Acc Email Verificati Personal Info Pick a Usernar Create Passwor Insert your Personal information Birth. Then click Next.	e Be sure to use your real date of birth, you may need it for account reconvert later.

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How to Register as a New Bidder

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



Enter your desired **Username**. Your Username must be at least 6 and no more than 64 characters in length. It can contain upper- and lower-case letters, numbers and only ._- no other special characters. Then click **Next**.

Create OH ID Account	Create Password
Email Verification	Password Requirements Must have at least 8 and no more than 30 characters in length Must contain 1 character from each of the following categories:
Personal Info	Was contain a character from each of the following categories. Opper case letters (A-Z) Cover case letter (a-Z)
Pick a Username	 Numbers (0-9) Special characters (!\$π,%@~^&*+=><(){]]]%";:\/?')
4 Create Password	 Cannot include your first name, last name, username, or OHID Example: If your name or username is John Smith, your password cannot contain "John" or "Smith"
5 Account Recovery	Password Confirm Password
6 Terms & Conditions	
	Cancel

Enter and confirm your password. Then click Next.

Your password must have at least 8 and no more than 30 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 (!\$#.,%@~^&*_-+=><(){}[]%'";:\/?`)

Your password cannot include your first name, last name, username, or OHID

How to Register as a New Bidder

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

Create OH ID Account	Account Recovery
 Email Verification Personal Info 	Your email (ohiobuys@mailinator.com) is the main way you'll reset your password. Adding your mob to your account ensures that we have a way to reach you If you lose access to your email. Set up mobile/text message account recovery You will receive a PIN via toxi message. Message and data rates apply. <u>See Terms & Conditions and P Policies</u> .
Pick a Username	Mobile Number
Create Password	Send PIN
5 Account Recovery	If you choose not to add your mobile number to your account at this time, you can skip this step.
6 Terms & Conditions	
	Cancel Next

For account recovery, you are given the option to either:

- a) Insert a phone number in the Mobile Number field and click Send PIN.
- a) Bypass this step by clicking skip this step.

If you have completed the account recovery steps, click **Next** to continue.

Create OH ID Account	Terms & Conditions
	In order to proceed with creating your account, you must agree to the following terms and conditions.
Email Verification	By clicking "I Agree" and creating an OH ID account, you consent to use electronic signatures with the State o Ohio and receive communications in electronic form.
Personal Info	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 activiti
Pick a Username	that occur under your OH ID account(s) or password(s). The Ohio Department of Administrative Services reserves the right, in the event of a violation of law or State of Ohio policy, or as a result of any suspicious activity occurring on your OHID account, to redues service, terminate accounts; renove or edit content on
Create Password	activity occurring on your Onjip account, to retuse service, terminate accounts, remove or edit content on ohid ohio gov, or cancel transactions related to your OHJID account.
Account Recovery	I Agree
6 Terms & Conditions	Confirm you are not a robot
	What is forty six thousand and fifty eight as a number?
	Verify
	Cancel Create Account

a) Click the I Agree checkbox

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- b) Confirm you are not a robot by answering the verification question
- c) Click Create Account to finish creating your OHID

A You will receive a confirmation email once your OHID has been created.

Click Continue. Enter your OH|ID credentials and click Log In.

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

The Bidder Registration Request form is displayed. 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.

Complete the following mandatory fields (any fields with a red asterisk are mandatory):

- 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: 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

ommodities	·)
26000000 - F	Power Generation and Distribution Machinery and Accessories
27000000 - 1	ools and General Machinery
30000000 - 5	tructures and Building and Construction and Manufacturing Components and Supplies
31000000 - N	Aanufacturing Components and Supplies
32000000 - E	lectronic Components and Supplies
39000000 - E	Electrical Systems and Lighting and Components and Accessories and Supplies
4000000 - Г	Distribution and Conditioning Systems and Equipment and Components

f) Security Control (similar to a CAPTCHA)

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

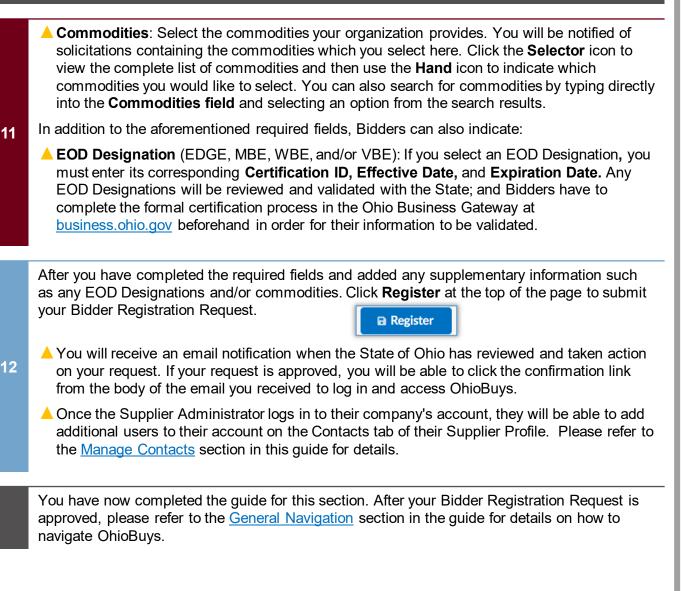
EOD Designation (EDGE, MBE, WBE, and/or VBE): If you select an EOD Designation, you must enter its corresponding Certification ID, Effective Date, and Expiration Date. Any EOD Designations will be reviewed and validated with the State; and Bidders have to complete the formal certification process in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

EOD Designation (i)		
MBE ×	•	
MBE Certification ID *	MBE Effective Date *	MBE Expiration Date *

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



ACCESSING OHIOBUYS AS AN EXISTING SUPPLIER

Overview:

- <u>What's Covered</u>: How to access OhioBuys as an existing Supplier
- <u>When to Reference This Section</u>: 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 OhioBuys 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 OhioBuys. Please refer to <u>Registering as a New Bidder</u> in this guide for details.

If you are a Requisite Program Supplier, please refer to the <u>Requisite Program Supplier Log</u> <u>In</u> job aid for details on how to log in.

To begin this process, navigate to <u>https://ohiobuys.ohio.gov/</u> and click **OhioBuys Log In.**



If you do not currently have an OH|ID, click **Create Account** and follow Steps 3-9 to complete the account creation process. Otherwise enter your login credentials (username and password), click **Log In**, and proceed to Step 10.

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 OhioBuys user.

⊖OH ID	Log into OH ID
One state. One Account. Your OH ID.	OHID (Username) Forgot OHID?
OH ID is a secure way for Ohioans and businesses to interact with multiple State agencies and access a variety of programs and services, with a single user account.	Password &
Create Account	Log in

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Step-by-Step Instructions for Accessing OhioBuys as an Existing Supplier

	Create OH ID Account	Email Verification
		With one OH ID account, you can sign in to multiple State of Ohio agency systems more securely.
	1 Email Verification	We need to verify the email address you want to use for your OHID account. A one-time PIN will be emailed to the email address you provide below.
	2 Personal Info	Email Address Confirm Email Address
	3 Pick a Username	
	Create Password	
3	(5) Account Recovery	
	(6) Terms & Conditions	Cancel Send PIN
		in the Email Address field and then again in the Confrim click the Send PIN button. A one-time code will be sent to your
	Create OH/ID Acco	Dunt Email Verification An email with a one-time PIV was sent to ohiobuys@mailinator.com. Image: Comparison of the pive sent to ohiobuys@mailinator.com
	1 Email Verification	
	2 Personal Info	The second secon
	(3) Pick a Username	Search your junk mail and spam folder for an email from: DONOTREPLY-EnterpriseIdentity@ohio.gov.
	(4) Create Password	Still Having Trouble?
4	(5) Account Recover (6) Terms & Conditi	Add DONOTREPLY-EnterpriseIdenity@Ohio.gov to your contacts.
		Send me a new FIN
		Carcel Net
	Input the code in the Enter PIN	I field, click Verify, and then click Next.
	Create OH ID A	Account Personal Info
		Legal First Name Legal Last Name
	Email Verific	
	2 Personal Inf	fo Date of Birth Last 4 digits of SSN (optional)
5		mm/dd/yyyy
	(3) Pick a Usern	ame Be sure to use your real date of birth, you may need it for account
	(4) Create Passo	recovery later
	Insert your Personal information	n including First Name, Last Name, and Date of
	Birth Then click Next	•

Step-by-Step Instructions for Accessing OhioBuys as an Existing Supplier



Enter your desired **Username**. Your Username must be at least 6 and no more than 64 characters in length. It can contain upper- and lower-case letters, numbers and only ._- no other special characters. Then click **Next.**

Create OH ID Accoun	create Password
Email Verification	Password Requirements Must have at least 8 and no more than 30 characters in length Must contain 1 character from each of the following categories:
Personal Info	Music contain 1 character from each of the following categories. Upper case letters (A-Z) Lower case letter (a-z)
Pick a Username	 Numbers (0-9) Special characters (!\$#,%b@~^&*+=><(){][]%''';\?')
4 Create Password	Cannot include your first name, last name, username, or OHI/D e Example: If your name or username is John Smith, your password cannot contain "John" or "Smith
5 Account Recovery	Password Confirm Password
6 Terms & Conditions	
	Cancel Next

Enter and confirm your password. Then click Next.

Your password must have at least 8 and no more than 30 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)

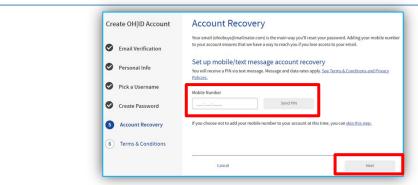
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Special characters (!\$#.,%@~^&*_-+=><(){}[]%'";:\/?`)

Your password cannot include your first name, last name, username, or OHID

Step-by-Step Instructions for Accessing OhioBuys as an Existing Supplier



For account recovery, you are given the option to either:

- a) Insert a phone number in the Mobile Number field and click Send PIN.
- a) Bypass this step by clicking skip this step.

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If you have completed the account recovery steps, click **Next** to continue.

Create OH ID Account	Terms & Conditions
	In order to proceed with creating your account, you must agree to the following terms and conditions.
Email Verification	By clicking "I Agree" and creating an OHJD account, you consent to use electronic signatures with the State Ohio and receive communications in electronic form.
Personal Info	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 activit
Pick a Username	that occur under your OH[ID account(s) or password(s). The Ohio Department of Administrative Services reserves the right, in the event of a violation of law or State of Ohio policy, or as a result of any suspicious activity occurring on your OHID account, to refuse service, terminate accounts, remove or edit content on
Create Password	activity occurring on your onjpractioning, or reuse service, terminate accounts, remove or earcontent on ohid ohio,gov, or cancel transactions related to your OHJID account.
Account Recovery	I Agree
6 Terms & Conditions	Confirm you are not a robot
	What is forty six thousand and fifty eight as a number?
	Verify

- a) Click the I Agree checkbox
- b) Confirm you are not a robot by answering the verification question
- c) Click Create Account to finish creating your OH|ID

A You will receive a confirmation email once your OH|ID has been created.

Click Continue. Enter your OH|ID credentials and click Log In.

Step-by-Step Instructions for Accessing OhioBuys as an Existing Supplier

Once your OHID is created, you will be routed to <u>https://ohid.ohio.gov</u>. From this page, find the **OhioBuys Citizen Portal** tile and click **Open App.**

If you do not see the OhioBuys Citizen Portal tile, click on the App Store header, search for "OhioBuys", and then click Request Access. You will receive an email notification when access has been granted and then will see the OhioBuys Citizen Portal tile under My Apps.
 If you see the Bidder Registration Request form after clicking Open App, your OH|ID has not been added as a Supplier Contact to any active Supplier accounts. If you need access to an active Supplier account, please reach out to your organization's Account Administrator to be added or email the helpdesk for assistance (OBM.SharedServices@OBM.ohio.gov).

Official Site of
Help Sea
netp Sea
r.price@das.

You will be navigated to the OhioBuys homepage. For details navigating OhioBuys and managing your contacts and profile, please refer to <u>General Navigation</u>, <u>Managing Contacts</u> and <u>Selecting Commodities</u> in this guide for details.

Ohio Buy	General Info. Sourcing Catalogs Orders Invoicing Performance	🔅 \rm emily p.	\sim
く り ☆	Company Profile Search	Q	
i	Announcements	My Purchase Order	rs
Company Profile	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:	ID Bu	iyer Co
Import Catalog	Participate in solicitations		
-	Manage company contact information	PO0000676 Rol	binsor
Orders	 Offer goods and services through a catalog Manage orders and invoices 		

GENERAL NAVIGATION

Overview:

- <u>What's Covered</u>: Explains the structure and content of OhioBuys.
- <u>When to Reference This Section</u>: To become familiar with navigating OhioBuys.

Supplier General Navigation

	Overview of Naviga	tion Options (1/3)	
A Ohio Buys	General Info. Sourcing Catalogs Performance	Orders Invoicing C	JEANNE H. 🗸
B < ") ☆	Supplier Portal	Manage Mass Confirmations Manage Deliveries	٩
	Announcements	Good Receipt / Advanced Shipping Notice Manage Shipments	My Purchase O
Company Profile	Ohio Buys is live for bidders and suppliers! Form eProcurement/eMarketplace, suppliers and bide procurement activities such as: • Participate in solicitations • Manage company contact information • Offer goods and services through a catalo • Manage orders and invoices Click here to reach the Supplier Portal.	ders can use Ohio Buys for many	ID PO00001551
Using the Naviga	Ohi	Il take you back to the homep io Buys ack a page (<), let you view	
applicable to you.	Click on a main menu option , Performance) to display its	the page includes options av n (e.g., General Info., Sourcir associated drop-down menu. Orders Invoicing Perfor	ng, Catalogs,
Selecting any opt		Confirmations	rresponding page.
	State of the second secon	/ Advanced Shipping Notice	

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Supplier General Navigation

Ohio Buys	General Info. Sourcing Catalogs Orders Invoicing			JEANNE H. 🗸
Ono Duys	Performance	÷	. 0	
< "Э ☆	Supplier Portal Search .	Do	My Profil	e
		žΞ	My pend	ing validations
:	Announcements	J	My Schee	duled Tasks
Company Profile		¢	Logout	
	Ohio Buys is live for bidders and suppliers! Formerly known as Ohio			ID
6	eProcurement/eMarketplace, suppliers and bidders can use Ohio Buys for many procurement activities such as:			
Import Catalog				PO000015
	 Participate in solicitations Manage company contact information 			
1	Offer goods and services through a catalog			
Orders	 Manage orders and invoices 			
	Click here to reach the Supplier Portal.			

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 OhioBuys. If you would like to log out, close your browser window. In addition, you will also be logged out after 20 minutes of inactivity.

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Supplier General Navigation

Overview of Navigation Options (3/3)

Ohio Buys	General Info. Sourcing Contracts Catalogs Orders	BROWN ENTER			GEORGE F		N ENTERPRI	SE SOLUTIO	NS LLC
< "D 🕁	Supplier Portal	0000180541				4	BROWN E SOLUTION	NTERPRISE IS LLC 00001	180541
? Need Help Getting	Announcements	5935 WILCOX PI		3016 DUBLIN Purchase Or			BROWN E SOLUTION 1	NTERPRISE IS LLC 00001	180541-
Started?	Welcome! Suppliers and bidders can now use Ohio Buys for State pro activities for some agencies.	ocurement		ID	Buyer Contact	Status	Currency	Ordered (i)	Progre
Import Catalog	IMPORTANT Head Office Notice: If you are responding to a solicitati are attempting to perform contract management activities (e.g., negoti contract), you need to be logged into your Head Office profile. To toggi	ating a	(and	PO00016964	Konik Christopher	Acknowledged	I USD	4,817.93	; Integ Notific Requis Review
Orders	locations, click on your organization's name in the top right-hand side select the location you would like to view. You can confirm you are lool head office location, by navigating to the Company Information tab of y and reviewing the OAKS ID. If there is not a -1, -2, -3, etc., after the lis are viewing the head office location.	king at your your profile	610	PO00016955	K. Newport Amanda	Ordered	USD	6,350.75	; Integ Notific Requis Review

If you are a listed as a contact for multiple Supplier locations, you will see a drop-down menu next to your organization's name which will allow you to toggle between the various company locations with which you are associated.

If you are responding to a solicitation, or if you are attempting to perform contract management activities (e.g., negotiating a contract), you need to be logged into your Head Office profile.

To toggle between your company's locations, click on your organization's name in the top right hand side of page and select the location you would like to view. You can confirm you are looking at your head office location, by hovering the location drop-down option and reviewing the OAKS ID. If there is not a -1, -2, -3, etc., after the listed ID, you are viewing the head office location. The locations associated with your organization are managed within the Supplier Portal: <u>https://supplier.ohio.gov</u>.

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.

Supplier General Navigation

Overview of Search Functionality

B Search Reset	eywords Order Cont PO00000858 - Req 5/20/2020 × PO00000859 - DM OAKS PO 2 ×	tract Type	Search
Deliveries	Iters Order: PO00000858 - Reg. 5/20/2020 PO00000859 - PO00000861 - Copy of DM OAKS PO 5 PO00000862 - DM O/		
Min. Amount Max.	Create Receipt	0 Result(s)	
▲ Users can search fo	or documents on any of the Bro		
	thin OhioBuys, you will be able for more than one order at a t		at once. F
example, searching The advanced searching	for more than one order at a t ch pane that is indicated by the	ime. e funnel(▼) icon allows the	
example, searching The advanced searching	for more than one order at a t	ime. e funnel(▼) icon allows the	
example, searching The advanced searching	for more than one order at a t ch pane that is indicated by the	ime. e funnel(▼) icon allows the	
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Supplier General Navigation

Page Navigation Overview: Purchase Order Example

	Ohio Buys	General Info. Sourcing Catalogs Orders Inv	voicing Performance	🗘 Nancy S.	1
	< 5 A	PO: PO00002034 - Sticky Notes for Fish	1er RdCINCINNATI ASSOCIATION FOF	R THE BLIND - CINCINNATI ASSOCIATION FOR THE	1
(C i Purchase Order	L B	Acknowledge Create an advanc	ced shipping notice Create Invoice Print PO	
		Header		Ship to	1
		Order Label		DRC OPI MODULAR INST W/ 5350 FISHER ROAD	4
		Sticky Notes for Fisher RdCINCINNATI ASSOCIATI	ON FOR THE BLIND	43228 Columbus Ohio	
		CINCINNATI ASSOCIATION FOR THE BLIND			
		Organization DRC230900 Madison Correctional Inst MDCI	*	Delivery & Payment	
		Legal Company State of Ohio		Incoterm	1
		Order Date			
		Buyer Contact		Incoterm Location	
		Requisitioner Alex		PCard Credit #: 1212312323534546	
		Supplier Contact SMITH Nancy		Month	
		Currency		February Year	
		USD		2022 PCard CVV #:	
				199	
	_				
Α	the page.	4 - Sticky Notes for Fisher RdCIN	CINNATI ASSOCIATION FOR T	THE BLIND - CINCINNATI ASSOCIATION	FOR THE
	-	available to certain use		the task being completed, ar Use these buttons to take a	
В	Green Butto	ons: Submitting an actio	on. Ackr	nowledge	
	Red Buttons	s: Canceling or rejectin	g an action.		
	• Light Blue F	Buttons: Saving an action	on.		
	-	-			
	Dark Blue B	<i>Buttons:</i> Performing an	optional or additional	action.	
	The Functiona	al Tabs are located on	the left side of a page	e. Major tasks are organized	by
С	functional tabs task (e.g. Purc	0	able you to see addition	onal information related to a	specific
Ŭ					
			i Pur	rchase Order	
	You have now	completed the quide fo	or this section. Now the	hat you are familiar with navi	aatina
		g OhioBuys, refer to the		5	9-11.9
	5	, ,		- 5	23

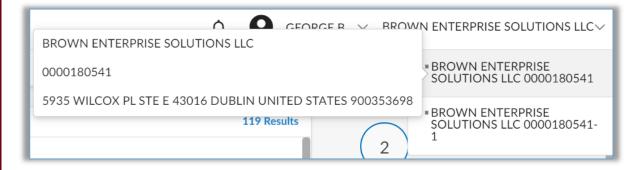
MANAGING CONTACTS

Overview:

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

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

- Your organizations should get their contacts registered as soon as possible and each contact should verify their access OhioBuys access. Registering an OhioBuys account and subsequent contacts for your organization will ensure your company has access to, is familiar with, and is readily prepared to bid within OhioBuys when the time comes.
- 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.
- When adding contacts, please start with adding them to your head office location as these are the contacts that can be invited to solicitations. To toggle between your company's locations, click on your organization's name in the top right hand side of page and select the location you would like to view. You can confirm you are looking at your head office location, by hovering the location drop-down option and reviewing the OAKS ID. If there is not a -1, -2, -3, etc., after the listed ID, you are viewing the head office location. The locations associated with your organization are managed within the Supplier Portal: https://supplier.ohio.gov.



1

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

Ohio Buys	General Info.	ourcing	Catalogs	Orders	Invoicing	Performance
く つ ☆	Company Profile)I				

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.

3

く ⑤ ☆	Company Info
« i Company Information	
😩 Contacts	Internal Contacts

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).

< "ን ☆	Company Info	(
« i Company Information							Save	
🐣 Contacts	Internal Cont	acts					Client contacts	
ය Additional Information							3	
Documents & Certs.	Select Exist	ing Contact	+ Create New	/ Supplier Contact			Email	Contac
	Label	Contact	Positi	on Role		Status Primary Phone	ldeme@kpmg.com	
	面 LaCroix One	OneLaCro	vix@test.com	Order Contact	•	Active 999-999-9999		
	D Supplier LaCroix	 lacroix@te 	est.com	Supplier admin ×	•	Active		

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

Contact information should be kept up to date with the most accurate data at all times. Please ensure all internal contacts listed on the supplier record are current and remove/update any outdated, obsolete, or erroneous information.

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

		E Save Save & Clo
Identity		
Title	First Name *	Last Name *
Email *	•	
Status		
Active Supplier		

- 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 created by navigating to <u>https://supplier.ohio.gov</u> and clicking Sign Up.
- 5) 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.).
 - ▲ Assign the **Contract Contact** role to any user who will need to be notified about a solicitation or responsible for a contract. In order for the State to notify them through OhioBuys, the user must have this role.
 - Assign the Order Contact role to any user who will be responsible for reviewing and acknowledging purchase orders.
 - Assign the Supplier Admin role to any user who will be responsible for managing contact and company profile information.
 - ▲ Assign the **Revenue Share** role to any user who will be responsible for reviewing and reporting revenue share information for a contract.

Label Contact	Position Role	Status Primary Phone
LaCroix One One One	Ι	▪ Active 999-999-9999
	Contract contact	
LaCroix • lacroix@test.	com Order Contact Supplier admin	Active

4

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

6) Click Save.

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 OhioBuys.

Label	Contact	Position Role
前 LaCroix One		Order Contact 👻

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 :

4

• 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**.

	Label	Contact	Position	Role	Status Primary Phone	
Û	LaCroix One	OneLaCroix@test.com	3	Order Contact 👻	Active 999-999-9999	🕞 Sav
Û	Supplier LaCroix	 lacroix@test.com 		Supplier • admin ×	Active	

- 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 OhioBuys.

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

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

	Label	Contact	Position Role	Status Primary Phone
Û	laCroix One	OneLaCroix@test.com	Order Contact •	Active 999-999-9999
Û	Supplier LaCroix	 lacroix@test.com 	Supplier admin ×	Active

Save

- c) Add an Existing Company Contact In OhioBuys:
 - 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.

Keywords	Supplie	r	٩	Search Reset	
	Position	Phone	Cell Phone	Email	Other assigned suppliers
GRIFFIE JR		513/771-7000		MGRIFFIEJR@GTINDUSTRIALSUPPLY.COM	1GENERAL TEMPERATURE CONTR
		513/771-7000		TPETERSON@GTINDUSTRIALSUPPLY.COM	1GENERAL TEMPERATURE CONTR

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 (×) 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 <u>Selecting Commodities</u> section in this guide.

SELECTING COMMODITIES

Overview:

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

How to Select Commodities

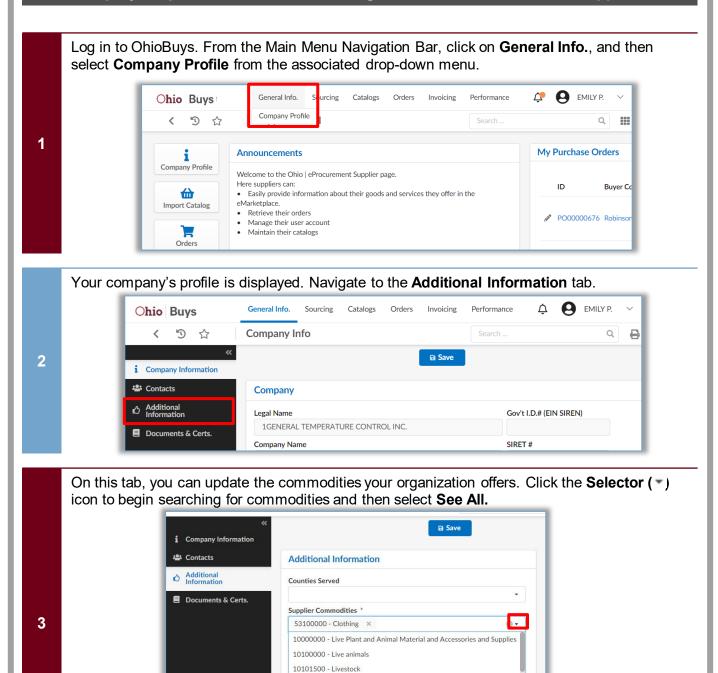
Step-by-Step Instructions for Selecting Commodities as a Bidder/Supplier

Please note, commodities are managed at the location (i.e., address) level, not the Supplier level. When managing commodities, please add them to your head office location as this is the location that is invited to solicitations. To toggle between locations, click on your organization's name in the top right hand side of page and select the location you would like to view. You can confirm you are looking at your head office location, by hovering the location drop-down option and reviewing the OAKS ID. If there is not a -1, -2, -3, etc., after the listed ID, you are viewing the head office location. The locations associated with your organization are managed within the Supplier Portal: https://supplier.ohio.gov.

BROWN ENTERPRISE SOLUTIONS LLC	BROWN ENTERPRISE SOLUTIONS LLC~
0000180541	BROWN ENTERPRISE SOLUTIONS LLC 0000180541
5935 WILCOX PL STE E 43016 DUBLIN UNITED STATES 900353	BROWN ENTERPRISE SOLUTIONS LLC 0000180541- 1

How to Select Commodities

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



10101501 - Cats 10101502 - Dogs 10101504 - Mink 10101505 - Rats

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 Q Search 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 H 48000000 - Service Industry Machinery and Equipment and Supplies
 A ⊕ 🗍 🐘 49000000 - Sports and Recreational Equipment and Supplies and Accessories ⊕ □ ₱ 5000000 - Food Beverage and Tobacco Products ⊕ 🕒 🐌 51000000 - Drugs and Pharmaceutical Products 1 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 (Im) 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. 53000000 - Apparel and Luggage and Personal Care Products ⊕ 🖌 🕒 53100000 - Clothing 5 ⊕ □ ₺ 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 OhioBuys, 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 OhioBuys Keywords field and then Search and select it from the results. 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. 6 Save You have now completed the guide for this section. For next steps in managing your company profile please refer to the Uploading Documents section in this guide. 33

UPLOADING DOCUMENTS

Overview:

- <u>What's Covered</u>: Uploading documents and certifications to your Company Profile
- <u>When to Reference This Section</u>: When you would like upload legal documents, licenses and, and/or other documents (e.g., Insurance, Workers Comp, Affirmative Action Plans, etc.) to your Company Profile in OhioBuys.

OhioBuys How to Upload Documents and Certifications

Step-by-Step Instructions for Uploading Documents and Certifications

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

Ohio Buys	General Info. Surcing Catalogs Orders Invoicing Performance	🗘 😧 en	MILY P. 🗸
< "D ☆	Company Profile Search		۹.
i	Announcements	My Purchas	e Orders
Company Profile	Welcome to the Ohio eProcurement Supplier page.		
ti	Here suppliers can: Easily provide information about their goods and services they offer in the 	ID	Buyer (
Import Catalog	eMarketplace. • Retrieve their orders • Manage their user account • Maintain their catalogs	PO0000	0676 Robinsc
Orders	Mantan ther catalogs		

Your company's profile is displayed. Navigate to the Documents & Certs. tab.

1

2

3

Ohio Buys	General Info. Sourcing Catalogs Orders Invoicing	Performance ᡇ 😧 EMILY P. 🗸
< "D ☆	Company Info	Search Q
«	B Save	
i Company Information		-
📽 Contacts	Company	
പ്പ് Additional Information	Legal Name	Gov't I.D.# (EIN SIREN)
Documents & Certs.	1GENERAL TEMPERATURE CONTROL INC.	
	Company Name	SIRET #

On this tab, you can upload legal documents, licenses and certifications, and/or other documents (e.g., Insurance, Workers Comp, Affirmative Action Plans, etc). Depending on the type of document you wish to upload, click **Add legal documents, Add licenses & certifications,** or **Add other documents.**

Legal Documents	
Add legal documents	
0 Result(s)	
Licenses & Certifications	
Add licenses & certifications	
0 Result(s)	
Other Documents	
Add other documents	

OhioBuys How to Upload Documents and Certifications

Step-by-Step Instructions for Uploading Documents and Certifications

Complete the following fields:

4

5

- a) Document Type (e.g., Affirmation Action Program Verification, Certificate of Insurance, etc.)
- b) Name (a summary of what the document is)
- c) Document (click the Click or Drag to add a file button to search for and select the document you would like to upload)
- d) Begin Date (the starting date the document is valid)
- e) Expiration Date (the expiration date for the document)

After these fields have been populated, click Save & Close.

Description		Follow up
Document Type *	Status Draft	Notification Date
Name	Begin Date	Date Archived
Document * Ø Click or Drag to add a file 	Expiration Date	Request Date
Document's owner SMITH Nancy	Validity	

The document has been added to your Company Profile. Continue to add documents as needed.

▲ You will receive email notifications 60 days prior to the expiration date of any documents you upload.

You have now completed the guide for this section. For details on how to submit Bidder change requests to update your address or add EOD statuses, please refer to the <u>Submitting</u> <u>Bidder Change Requests</u> section in this guide.

SUBMITTING BIDDER CHANGE REQUESTS

Overview:

- <u>What's Covered</u>: Creating and submitting Bidder change requests
- <u>When to Reference This Section</u>: When you are a new Bidder (i.e., not an existing Supplier) and you would like to update your company information (e.g., add EOD statuses, change your address, etc.)

OhioBuys How to Submit Bidder Change Requests

1

Step-by-Step Instructions for Submitting Bidder Change Requests

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

Ohio Buys	General Info. Sourcing Catalogs Orders	Invoicing Performance	C emily p.	\sim
< "D 🕁	Company Profile	Search	٩	=
i An	nouncements		My Purchase Orde	rs

Your company's profile is displayed. Click **Create a change request.**

Save Create a change i Company Information If Save Create a change ∴ Company Address Address ∴ Additional Information Code Address Label ① □ Documents & Certs. Code Address Label ① ☑ Change Log Option (LD# (EIN SIREN)) DPA Supplier ①	<mark>⊖hio</mark> Buys	General Info. Sourcing Cont	racts Catalogs Ord	lers Invoicing	Performance		
Company Information Address ⁴ 2 ⁴ Contacts ^A Additional Information Company Address ^A Additional Information Code SUP827014 Address Address Label ① ^B Documents & Certs. Legal Name ① Gov't I.D.# (EIN SIREN) Address Line 1	< "D ☆	Company Info					
 Additional Information SUP827014 Legal Name ① Gov't I.D.# (EIN SIREN) Address Label ①	Company Information				•	■ Save	Create a change i
Documents & Certs. Icegal Name ① Gov't I.D.# (EIN SIREN) Address Line 1							
Documents & Certs. SUP827014 Legal Name ① Gov't I.D.# (EIN SIREN) Address Line 1	🖴 Contacts	Company				Address	
Legal Name ① Gov't I.D.# (EIN SIREN) Address Line 1							
	ර Additional Information	Code					

Enter the **Reason for change request** and make any requested updates (e.g., update your Address, add EOD statuses, etc.). After you have made your requested updates, click **Submit**. You will receive email notifications as your change request is reviewed and approved by the State.

く う ☆	Company Change Request				
く う ☆	Company Change Request				
	**			Save Cancel Submit	
i Company Information			_		
Changes Requested	Change request				
	Reason for change request *				
	Company			Address	
	Code			Address Label (1)	
	SUP827015				
	301027013				
	Legal Name ①	Gov't I.D.# (EIN SIREN)		Address Line 1*	
		Gov't I.D.# (EIN SIREN)	DBA Supplier ①	Address Line 1* 35 E Garage Ave	
		Gov't I.D.# (EIN SIREN)	Yes		
	Legal Name ①			35 E Garage Ave Address Line 2	
		Gov't LD.# (EIN SIREN)	Yes	35 E Garage Ave Address Line 2 Zip Code *	City
	Legal Name ③ Company Name * ④		Yes	35 E Garage Ave Address Line 2 Zip Code * 43004	Columbus
	Legal Name ① Company Name * ① Bob's Garage		Yes	35 E Garage Ave Address Line 2 Zip Code *	Columbus
	Legal Name () Company Name * () Bob's Garage Corporate Email * () bob@bobgarage.com Work Phone Number		Yes	35 E Garage Ave Address Line 2 Zip Code * 43004 Country *	Columbus State/Province
	Legal Name () Company Name * () Bob's Garage Corporate Email * () bob@bobsgarage.com		Yes	35 E Garage Ave Address Line 2 Zip Code * 43004 Country * UNITED STATES	Columbus State/Province

You have now completed the guide for this section. For additional OhioBuys training resources and support, please refer to the <u>Accessing Additional Training Resources and Support</u> section in this guide.

ACCESSING ADDITIONAL TRAINING RESOURCES AND SUPPORT

Overview:

- <u>What's Covered:</u> Instructions for accessing additional OhioBuys training materials and support.
- <u>When to Reference This Section</u>: When you need additional information or support.

How to Access Additional Training Resources and 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 OhioBuys.Training beyond this guide includes step-by-step navigational videos and job aids. The training videos and job aids are available on the <u>OhioBuys website</u>.

Videos:

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

You have now completed the guide for this section. For additional support, please contact our Ohio Shared Services Team at <u>OBM.SharedServices@OBM.Ohio.Gov</u> or 877-644-6771





Job Aids



Help Desk Support

Version Control

Version	Publish Date	Summary of Updates	Pages Updated
1.0	4/24/20	Initial draft	ALL
1.1	5/27/20	Updates around search functionality using multi-selector fields	19
1.2	6/8/20	Updates to Supplier view when selecting multiple locations	18, 22
1.3	6/23/20	Added revised OhioBuys landing page	6,11
1.4	7/10/20	Added phone number extension field	26
2.2	2/19/21	Updated OH ID screens, noted mandatory fields on Bidder Registration Form, Added additional contacts clarification, Added Uploading Documents section	7-17, 24, 32-34
2.3	3/1/21	Added a note referencing that OAKS will be importing UNUSPSC codes into OhioBuys	7, 30
2.4	3/15/21	Added WBE status option. Added new OhioBuys homepage screenshots	1, 8, 11
3.0	4/8/21	Added details on Bidder change requests	36, 37
3.1	5/10/21	Removed expired Job Aid links	40
3.4	6/7/21	Added additional role clarification information	26, 27

Version Control

Version	Publish Date	Summary of Updates	Pages Updated
3.5	7/8/21	Added details on how to easily see a location's OAKS ID	21, 27, 28
3.6	7/19/21	Added a note at the beginning of the Managing Contacts section. Also correct the typo at the end of Page 24	24, 25
3.7	9/20/21	Updated all supplier URLs and updated the OH ID login screens	6, 7, 8, 11, 12
3.8	10/4/21	Updated OhioBuys logos and wording	All
3.9	11/4/21	Updated new OHID account creation steps	7,8,12,13-17
4.0	1/20/2022	Minor language updates	17
4.1	3/15/22	Inform suppliers to keep the contacts information current and not to have erroneous or obsolete data there.	26