Creating and Awarding Quick Quotes in OhioBuys

For agency users responsible for creating, updating, submitting, and reviewing quick quotes in OhioBuys.

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Introduction

Overview: A quick quote is a standardized, simplified solicitation process that encourages competition and standardization. A quick quote needs to be completed in OhioBuys whenever a line item in a purchase requisition references a State Term Schedule (STS) contract or contains over \$5,000 in non-catalog items for a Supplier.

This learner guide covers the activities related to creating a quick quote in OhioBuys, identifying and inviting Bidders and/or Suppliers, reviewing and comparing quotes, making awards, and updating associated purchase requisitions.

- Agencies that have adopted OhioBuys and are using it in the manner prescribed by State of Ohio Administrative Policy: Purchasing Procedures (PM-01) are not required to submit requests to the Controlling Board when a minimum three or more quotes or proposals is not obtained when purchasing from an STS Contract. Instead agencies must invite multiple suppliers to the solicitation.
- State agencies not using OhioBuys in the manner prescribed in PM-01 shall continue to obtain a minimum of three quotes or proposals.
- Unless you are planning to create a contract based on the results of the quick quote, you must create a purchase requisition prior to the creation of the solicitation.
- Any quick quote that is being created and liked to a requisition must be awarded in OhioBuys.
- Agencies are encouraged to rely upon the items in the item grid as the official proposal from the supplier, instead of any quotes (e.g., PDFs) that may also be attached along with their proposal. Doing so eliminates the risk of confusion when the proposal in the item grid and the PDF quote don't contain the same pricing, or when attachments list other terms and conditions that conflict with those governing the solicitation (e.g., shipping charges).
- Agencies should consider including language such as "Completion of the grid is required and will be considered the response for evaluation. No outside/additional documentation will be considered." in the Process field of solicitations, when it's applicable.
- If a PDF quote is attached, agencies must review it to ensure it is consistent with the terms and conditions governing the solicitation. If there are any inconsistencies, the agency must conduct a clarification to obtain an updated copy of the quote.
- Suppliers have to agree to the following before they are able to submit a bid:

By clicking the below "I Agree," you are agreeing to the following:

1. If you are quoting against a contract in which you are a current supplier, the terms of that contract will apply.

2. If this solicitation includes terms and conditions, the terms and conditions of the solicitation will apply in addition to the State Standard Terms and Conditions linked below. If there is a conflict between the terms and conditions in the solicitation and the State Standard Terms and Conditions, the solicitation controls.

3. If this neither references a current contract nor includes terms and conditions attached to the solicitation, you are agreeing to the State Standard Terms and Conditions linked below.

Users: Both Requisitioners and Requesters who have been given the Quick Quote Procurement User role may create and manage quick quotes.

Process Overview:

1. Create the Quick Quote Solicitation: From a purchase Requisition, you can click Create Quick Quote to start the Quick Quote Process.

2. Set Up the Quick Quote Solicitation: You can add information including the start and end dates, selection process, and summary of the need to provide additional details to potential Suppliers and Bidders. You may also provide more detail about the items contained in the solicitation, including adding any relevant attachments.

3. Identify and Invite Bidders / Suppliers: You must select Suppliers who can provide the commodity requested in the quick quote solicitation. Searching for Bidders and Suppliers to invite can be filtered on qualifications such as Equal Employment Opportunity qualification.

4) Release the Quick Quote Solicitation: You must release the quick quote solicitation by sending the invite to the selected Bidders and/or Suppliers. Doing so will automatically post the solicitation on the OhioBuys Public Portal where additional Bidders / Suppliers can see and respond to the request.

5) Analyze and Award: At the close of the bidding period, OhioBuys provides a simple and straightforward view for you to compare quotes from Bidders / Suppliers side-by-side and select the one that best meets your needs.

6) Update the Purchase Requisition: Once an award has been made, the original purchase requisition needs to be updated with the award details. After the original purchase requisition has been updated, it can be submitted for approval.

Creating and Releasing Quick Quote Solicitations

Topics

- Create a Quick Quote Solicitation
- Identify Bidders and Suppliers for a Quick Quote
- Release a Quick Quote Solicitation

 Link to Post a Solicitation
- Cancel a Solicitation

OhioBuys Creating a Quick Quote Solicitation

Updated: 09/04/2024 07:47 PM

Version: 13.0

Purpose & Profiles

This job aid covers the process for creating a new quick quote solicitation.

Profiles: Requisitioners, Requesters (with the Quick Quote Procurement User profile)

Used When

Reference this when creating a new quick quote.

🔺 Note

Agencies that have adopted OhioBuys and are using it in the manner prescribed by State of Ohio Administrative Policy: Purchasing Procedures (PM-01) are not required to submit requests to the Controlling Board when a minimum three or more quotes or proposals is not obtained when purchasing from an STS Contract.

State agencies not using OhioBuys in the manner prescribed in PM-01 shall continue to obtain a minimum of three quotes or proposals.

DOT Note

When DOT users create a purchase requisition that requires a quote, there are certain situations where it is appropriate to create a quick quote, and others where it is appropriate to create a request for quote (RFQ) in OhioBuys.

- **RFQ** solicitations should be created when purchasing non-contract items that require quotes in OhioBuys in order to meet all State requirements for electronic agency competitive selection. Please work with the appropriate Contract Analyst to conduct an RFQ solicitation and get a contract created for this purchasing need.
- Quick quote solicitations should be created when purchasing items from existing contracts or catalogs that require quotes in OhioBuys. (e.g., STS Contracts, Competitive Two Phase Contracts)

Create Solicitation

1. Open the purchase requisition for which you would like to create a quick quote solicitation and click **Create Solicitation**.

Note that the purchase requisition must be in either Draft, Initialized, or Requisitioner Approval status.



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	Organization ()*	Fiscal Year			
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	Basiness Unit*	Budget Date *			
	DP501 - Dept of Public Safety 0	 — 4/12/2023 	0		

🔺 Note

If you are creating a solicitation in reference to a contract with a hosted or punchout catalog you must add items from the catalog to your cart before clicking Create Solicitation. Freeform items will not update properly.

Create a New Sourcing Project

Create a New Sourcing Project	
Sourcing Project Label*	
Quick Quote Example	
Sourcing Type*	
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RFx Type*	
Quick Quote	Θ-
RFx Grid*	
Response ×	0 -
Commodities*	
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Organizations*	
DPS100000 Directors Office CDSB ×	Θ-
Open Date*	
# 4/12/2023	
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The associated line item information from the purchase requisition will be automatically carried over into the item grid of a new quick quote solicitation (Supplier, Item Description, UOM, Price, Quantity). You can edit these details prior to releasing the quick quote solicitation for responses. From this page:

- Enter the **Sourcing Project Label**, which should be a short description of what the quick quote solicitation is for. By default, this field will populate with the Label from the purchase requisition. Note that this will also be the title that Bidders / Suppliers see, and that users should always spell out agency names and divisions/offices/bureaus.
- Set the Sourcing Type and RFx Type to Quick Quote.
- Confirm and make any necessary updates to the **Commodities** and/or **Organizations** fields. These fields are pre-populated based on your purchase requisition.
- Enter the Open Date. This informs when responses will be opened and reviewed.

Go to Sourcing Project

2. After completing the sourcing project fields, click **Go to Sourcing Project**.



Go To Sourcing Project

Sourcing General Information

3. The sourcing project is displayed. Review the **Sourcing General Information** section for accuracy. After making any relevant updates, click **Save**.

Save



Setup Team

4. Navigate to the Setup Team tab.

🔺 Note

If there will not be any team members from your organization assisting you with this quick quote, you can proceed to step 5.



Setup Team

On the **Setup Team** tab, you are able to add team members to your quick quote. This is particularly helpful if you would like someone to be able to take action on your quick quote while you are out of the office. Note that Requisitioners and Agency Procurement/Fiscal/Final Approvers can see all sourcing projects within their organizational scope (i.e., these users can see relevant sourcing projects without being manually added to each solicitation team).

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	Email 🌲	Profile	Contact 🌲
Û	mkaizer@kpmg.com	SME (Sourcing Project) × C -	KAIZER Mike
前	michael.kaizer@das.ohio.gov	Responsible (Sourcing Project) ×	KAIZER-REQUESTER Michael

Search for your team members using the Select User(s) field, and update their Profile if appropriate. Then click Save.

🔺 Note

- Only the user listed as Responsible for the project is able to release and award the quick quote.
- In most cases, users added to a team on a quick quote solicitation should be given either the Contributor or SME role.

Creating and Awarding Quick Quotes in OhioBuys Creating a Quick Quote Solicitation

Prepare Solicitation

5. Navigate to the Prepare Solicitation tab.





Amendment



Though not required, users should also update the **Posting Approval Required** field to **No.**



Dates

7. Update the solicitation dates, starting with the **Closing Date and time**, which is the date and time that responses will be due from Bidders and/or Suppliers.

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Solicitation Dates

Open and Closure (i)

Begin Date		
iiii 4/12/2023	6:16:03 PM 💿 🗸	
Closing Date*		
iiii 4/13/2023	9:00:00 AM 💿 🗸	 Close automatically

Open and Closure Dates

- Begin Date The date and time the solicitation begins. This field will automatically populate with the date and time that the sourcing project was created.
- Closing Date The date and time by which Bidders and Suppliers must submit their response(s). Closing dates and times should be during business hours so that issues can be resolved before bids are due.

To future date a solicitation start, enter a Begin Date that is in the future. When posting the solicitation, click Cancel in the pop-up window that appears. Doing so will block the Suppliers from bidding until the future Begin Date is reached, thereby future dating the solicitation.

Inquiry Period (i)

12:00:00 AM 🛞 🗸
9:00:00 AM 💿 🗸

Inquiry Period Dates

- Inquiry Begin Date The date and time that the inquiry period begins, and Suppliers will be able to submit questions using the inquiry function in OhioBuys. If the Inquiry Begin Date is not populated by the user, it will automatically match the solicitation posting date once the solicitation is open for bidding.
- Inquiry End Date The date and time that the solicitation will stop accepting Supplier questions using the inquiry function. Users must always manually enter the Inquiry End Date.

Enable for Public Posting (i)

Publication begin d	ate
₫ 4/12/2023	12:00:00 AM 🛽 🕶
Publication end dat	e

Enable for Public Posting Dates

- **Publication begin date** The date on which the solicitation will appear for viewing on the public OhioBuys solicitation portal. If not populated by the user, the publication begin date will automatically populate to match the Begin Date of the solicitation.
- Publication end date The date on which the solicitation will stop appearing on the public OhioBuys solicitation portal. If not populated by the user, the publication end date will automatically populate with a date one year after the Closing Date of the solicitation.

🔺 Note

The attachment function for replying to inquiries is not enabled. All relevant details and documentation should be provided in the comments section. For more information on Supplier Inquiry, please consult the Creating, Managing, and Awarding Solicitations Learner Guide in the <u>OhioBuys Training Catalog</u>.

🔺 Note

If the Publicly Post Opportunity checkbox is disengaged, verify that the Commodity Suppliers Notified selector is set to No.

Process

8. Complete the **Process** field. This field provides additional details regarding the basis for making an award, and should be used to explain things like what the award will be based on or other procedures that apply to the solicitation.

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Setup Project	Save & Close III Save = Other A	ctions -	
Setup Team		8	
Inquiry		9.00.00 AM 0	
Add Suppliers		Process	
Prepare Solicitation			
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Analyze & Award		Summary	
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			_
	 Tracking 		
	Created on 4/12/2023 6:16:03 PM (UTC-0 by Kaizer-Requester Michael		
			_
ip[[Legal mentions]			Ohio v3.0 C Taiking - Now

Lowest bidder will be awarded.

Summary

Process

9. Complete the **Summary** field, which should include additional details regarding the purpose for the solicitation. The Summary field will automatically populate with the the information contained in the Request Description field of the purchase requisition and needs to include a clear description of the need, when the goods/services will be needed, the Ship To address, and the method of payment.



Summary

(i)

Repair services for the machines in our training lab. at 123 Parth Ave in Cleveland. Services are requested for late April. Payment will be made on site.

🔺 Note

The Process and Summary fields will both be visible to the public on the OhioBuys public solicitation portal.

🔺 Note

Though not required, users can complete the **Ship to** field on the Prepare Solicitation tab to provide Bidders and/or Suppliers with a precise shipping address.

Ship to		
Ship To		
	•	

Available addresses are limited by a user's organizational scope. To add a Ship to address, begin typing one in and select it from the drop-down menu.

<text>

For details on subsequent steps in the Quick Quote process, refer to the following assets:

Identify Bidders and Suppliers for a Quick Quote

Release a Quick Quote Solicitation

Award a Quick Quote Solicitation

Update a Purchase Requisition with a Quick Quote Award

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

OhioBuys Locating an Existing Quick Quote Solicitation

Updated: 06/21/2024 05:22 PM

Version: 4.0

Purpose & Profiles

This job aid covers the process for locating a quick quote solicitation in OhioBuys.

Profiles: Requisitioners, Requesters (with the Quick Quote Procurement User profile)

Used When

Reference this when navigating to an existing quick quote solicitation that is in the in-progress, or completed state.

Click Sourcing

1. Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

Contracts

Create Sourcing Project

Shop

Sourcing

Sourcing Projects

Price Management

Create

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Resources				
The selected content contains no text				
My pending validations			Go to page	
			Piece H Gettir Starto	elp 6 27

Click My Sourcing Projects

2. You can search for a quick quote by Keywords, Commodity, Project Team, and Status. If you want to limit your search to only show quick quotes on which you are a team member, click the **My Sourcing Projects** checkbox.

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Click Search

3. Click the **Search** button.



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Click the Pencil

4. Click the **Pencil** icon next to a quick quote to open it.



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

OhioBuys Identifying Bidders and Suppliers for a Quick Quote

Updated: 08/07/2024 03:03 PM

Version: 8.0

Purpose & Profiles

This job aid covers the process for inviting Bidders and/or Suppliers to participate in a Quick Quote solicitation in OhioBuys. **Profiles**: Requisitioners, Requesters (with the Quick Quote Procurement User profile)

Used When

Reference this when inviting Bidders and/or Suppliers to participate in a quick quote solicitation.

For details on previous steps in the quick quote process, refer to the following assets:

Create a Quick Quote Solicitation

🔺 Note

In addition to the Bidders and Suppliers specifically invited to participate in a solicitation, unless the Suppliers Notified button on the Prepare Solicitation Tab is set to "No," all Bidders and Suppliers that have indicated they can provide the commodity associated with the solicitation will be notified that there is a new solicitation available.

Add Suppliers

1. Open the quick quote solicitation, and navigate to the **Add Suppliers** tab.





🔺 Note

If you wish to only invite Bidders and/or Suppliers who hold a valid MBDD status, turn on the MBE Set Aside indicator on this tab.

-	~
1	1

MBE	Set	Aside	

If you wish to only invite Bidders and/or Suppliers from an STS or MMA contract, engage the STS and/or MMA slider(s).



Note that this must be done before adding Suppliers. If either of these is selected, the Other Contracts field will become a required field and be pre-filtered to only show relevant STS or MMA contracts. Once a contract(s) is selected, all dealers associated with the selected contract(s) will be added to the Add Suppliers tab and will subsequently be invited to the solicitation.

Select Suppliers

Select Suppliers

CAREWORKS TECHNOLOGIES 0000067707 PO BOX 182878 43218-2878 COLUMBUS

INSIGHT PUBLIC SECTOR INC 0000085744 444 SCOTT DR 60108 BLOOMINGDALE SIRIUS COMPUTER SOLUTIONS INC

2411 DULLES CORNER PARK STE 800 20171 HERNDON

0000081304 10100 REUNION PLZ STE 500 78216 SAN ANTONIO

See All

DLT SOLUTIONS LLC

2. Click the **Select Suppliers** field. By default, this drop-down will display all of the Bidders and Suppliers who have set up their account with the relevant commodity code(s) in OhioBuys.

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Setup Team		v. Drommer	
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Add Suppliers	-	- Add a Task	
Prepare Solicitation	Select Suppliers		
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Review Award Results			
	MBE Set Aside		
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	0.00		
	O MMA		
Site maplificeal mentional			Ohio v3.0 © Training - New

🔺 Note

If the quick quote solicitation is for an item tied to a contract with Dealers, such as an STS contract, users can use the **Other Contracts** field to automatically pull all of the dealers into the list of added Suppliers.

Other Contracts	
	•

Users can locate the contract by clicking in the Other Contracts field and typing in the name of the contract, then selecting it from the drop-down menu. Users are able to select multiple contracts at once in the Other Contracts field.

Additionally, users can click **See All** on the Other Contracts field, search by an **index number** on the left side (e.g. STS123), check all of the contracts that come back, and then pull in all dealers for a particular index number.

🔺 Note

In certain circumstances, such as when conducting a two-phase quote, it may be appropriate to select Suppliers based on preexisting contracts in OhioBuys. Note that the process below does **not** work to add all of the Supplier(s) and Dealers from an STS contract. To locate the Dealers on an STS contract, please follow the steps outlined in the next note of this job aid.

Master Contract	Other Contracts	
•	-	

- If applicable, users can indicate the **Master Contract** and/or **Other Contracts** for the solicitation. This will automatically add all Suppliers associated with the Contract(s) to the list of invited Suppliers.
- These options are most commonly used when a contract has already been awarded to a pool of pre-qualified Suppliers and secondary solicitations amongst those Suppliers are required before a purchase can be made.
- Adding a **Master Contact** will pull the Supplier associated with a parent contract, as well as the suppliers associated with any child contracts. Note that users may only add one Master Contract.
- Adding Other Contracts will pull in the Supplier associated with a particular contract. Users should use this field to easily add the suppliers associated with a Competitive Selection Two Phase Contract. This field can also be used to quickly add contract Suppliers that are associated with a particular Index Number. Note that users may select multiple Other Contracts.

Other Contracts	
•	Add a Task
test1234 - Test Real Estate Amendment #1	
SERVICENOW-CATALOG - ServiceNow Catalog	
CTR001313 - Office Supplies and Related Products	
000009-01 - NexGen eProcurement	
CTR001307 - MWK Punchout v2	
CSP900917 - MANAGED SERVICE PROVIDER FOR NON	N-IT STAFF AUGMENTATION SERVICES Amendment #2
800767 - DO NOT USE Agricultural Machinery - Tractors,	, Mowers, Combines & Loaders, etc.
CTR001297 - Blanket Test Enhancement	
CRP30004 - Assorted Pressure-Sensitive Tapes v2	
12345 - ALB Robv2 082120 Amendment #2	
See	e All

Users can conduct a more detailed search in either the Master Contract or Other Contracts field by clicking in the drop-down menu and selecting See All. There, users can search for contract(s) using a variety of filters, such as the Index Number, by clicking on the More Filters (▼) icon. Selections can be made from the See All menu by clicking the Checkbox (□) icon(s) next to the relevant contract(s).

See All

3. To add additional Bidders and Suppliers that have not indicated on their company profile that they can provide the commodity associated with the solicitation on the profile, click **See All** in the Select Suppliers drop-down.

Select Suppliers		
I		-
	See All	



Creating and Awarding Quick Quotes in OhioBuys Identifying Bidders and Suppliers for a Quick Quote

Commodity Filter

4. Click the **X** icon next to the **Commodity** filter to remove it, then search for the Bidder and/or Supplier you would like to invite.

Commodity (i)		
81111812 - Computer hardware maintenance support service	×	Θ-

10		uppliers		-										8	x
Τ.				4)			Cic.	ie -							
	Keywor	-da	Com	rodiyy											
			811	111812 - Computer ha	ndware main	itenance support s	ervice × 0 •	Q. Sean	th Reset						- 1
	City		Court	ties Served											
P															- 1
v a	Code		Supp	lier Commodities				Set ID							
*										0					
R -	Filters	Commodity: 8	1111812 - Cor	sputer hardware maint	lenance supp	port service X L	evel : Supplier Hea	-office X	Set ID: STATE X						- 11
															_
	~	OAKS ID 0	Code 0	Company Name 🗧	Status o	MBDD Status	Address Code o	Set ID 0	Address Line 1 o	Panel	Set ID 0	Address Line 1 o	State/Province 0	Zip Code 🔅	City
		0000067707	SUP051879	CAREWORKS TECHNOLOGIES	Active Supplier				PO BOX 182878		STATE	PO BOX 182878	Ohio	43218- 2078	COLU
	~								2411 DULLES CORNER PARK		STATE	2411 DULLES CORNER PARK	Virginia	20171	HERN
	* *	0000091103	50/222190	DUT SOLUTIONS	Active Supplier				STE 800			STE 800			

🔺 Note

You can also filter your results to only show Suppliers with a Supplier Contact by toggling the **Supplier Contact on File** radio button.



OAKS ID 👙 Code

0000164503 SUP240538 ASSE

Supplier Contact on File (

Checkbox Icon

5. Click the **Checkbox** icon select a particular Bidder or Supplier or click the Checkbox icon next to the OAKS ID header to select all of the displayed Bidders and/or Suppliers. Then close the Browse Suppliers pop-up window.

Address Code 🚖



Save

✓ 00 1 Record(s)

6. Click **Save** to confirm the list of invited Bidders and Suppliers.





If you would like to remove a Bidder or Supplier, click the Trash Can

($\ensuremath{\overline{\mathrm{m}}}$) icon next to their name and then click Save.

🔺 Note

Users should select the **Sourcing Invitation Contact** to be listed as the **Main Contact** for the solicitation, if the supplier has applied that role to a user's account.

Sup	plier contacts	D				
+	Create New Suppl	ier Contact Select Existing Contact				
	Contact	Login ①	Role	Other assigned suppliers	Email	Primary Phone
Î	BROWN GEORGE	GBROWN@BESOLUTIONS.ORG	Contract contact × Order Contact × O • Revenue Share Contact × Supplier admin ×	BROWN ENTERPRISE SOLUTIONS LLC	GBROWN@BESOLUTIONS.ORG	
Î	Hunter Sally	shunter@besolutions.org	Revenue Share Contact × O - Supplier admin × Sourcing Invitation Contact ×	BROWN ENTERPRISE SOLUTIONS LLC	shunter@besolutions.org	614/588- 0248
Û	Request Ohio Buys	BESOBREQUEST@BESOLUTIONS.ORG	Contract contact ×	BROWN ENTERPRISE SOLUTIONS LLC	BESOBREQUEST@BESOLUTIONS.ORG	614-588-0248
ŧ	Sherman Kara	ksherman@besolutions.org	Contract contact × Order Contact × O • Revenue Share Contact × Supplier admin ×	BROWN ENTERPRISE SOLUTIONS LLC	ksherman@besolutions.org	6145880248

For details on subsequent steps in the quick quote process, refer to the following assets:

Release a Quick Quote Solicitation Award a Quick Quote Solicitation Update a Purchase Requisition with a Quick Quote Award

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

OhioBuys Releasing a Quick Quote Solicitation

Updated: 06/21/2024 05:35 PM

Version: 8.0

Purpose & Profiles

This job aid covers the process for releasing a quick quote solicitation. **Profiles**: Requisiitoners, Requesters (with the Quick Quote Procurement User profile)

Used When

Reference this when you are ready to post a quick quote solicitation and accept bids.]

For details on previous steps of the Quick Quote process, refer to the following assets:

Create a Quick Quote Solicitation

Identify Bidders and Suppliers for a Quick Quote

Prepare Solicitation

1. Open the quick quote solicitation that you would like to release and navigate to the **Prepare Solicitation** tab.





ltems

2. Navigate to the **Items** header to confirm the items that have been added automatically from the purchase requisition.

ot : 1 - Round : 2 - T	raining Lab Repairs (Open for Bi	dding) 🛚 🗸		
Setup Items	Confirm Invited S	uppliers	Documents	Workflow	
RFx Settings					
Solicitation Status				Workflow Status	
Open for Bidding		Save as a	a template	Open for Bidding	
RFx Type					
Quick Quote					
Collicitation Name*					
Solicitation Name					
Training Lab Repa	nirs				
Training Lab Repa	irs R	ound # 🛈		Amendment?*	



Quick Quote Item Grid

+ Add Grid	+ Add products	초 Export Grids to Excel -	1 Import Grids from Excel	Preview					
Use the excel Expor	t/Import feature for large so	licitations (exceeding 300 ite	ms)						
Response									
\equiv Actions $*$									
	0 Selected Delete	Selected Items							
						Unit .		Deliv.	
	Code (V)* \$	Type (V)* ≑	Label (V)*	Qty (V)* ≑	Unit (V)* 💠	price (V)	Reference Price ≑	date (V)	Deliv. date (V) ≑
	11.2	Require 🛛 -							
3	14_4	d Item							
	1	Require 🖸 -	Training Lab Desktop Repairs	1	AMT 🖸 -				
		ditem							
1 Record(s)									

- The information displayed in the grid is populated from your purchase requisition. Review the displayed information. Ensure that you complete the Label, Unit, Delivery Date (for Products), Manufacturer, SKU Number, and Detailed Description sections. (Some of these fields are not applicable when obtaining a quick quote for a catalog item.)
- Any fields with a (V) in the title are fields that are visible to a Bidder and/or Supplier when submitting their response.
- There will always be one blank line item displayed in the grid, this is where additional line items can be added to a quick quote solicitation if needed (e.g., and alternate item added by a Bidder or Supplier.
- To add attachments associated with an item, click the **Buyer Attachments** button and select the file that you want to upload.
- To make a field mandatory for a Bidder and/or Supplier, right-click on the column header for the field you like to update and then select **Column Settings**. From the displayed pop-up window, click the **Required?** checkbox and then click **Save & Close**.

🔺 Note

If there is a need to add additional items to the quick quote, it is recommended that users first add them to the purchase requisition, and then create a new quick quote using the Create Solicitation button. Lines added directly to the quick quote will not be able to be updated on the purchase requisition.

Documents

OhioBuys Suppliers Sourcing Contracts Shop Procurement Release & Permit Analytics Public Request 🛆 🗘 \varTheta Michael K. 🔹 🔞 3. Navigate to the **Documents** header to confirm that any く う ☆ Sourcing project: SRC00 001093 - Training Lab Repairs - Prepare Solicitation Q, Search `₩ ⊕ Forward Submit relevant attachments have been applied to the solicitation. Sa 11 3 Setup Items ted Suppliers De Workflo RFX Grid Group(s) Reset Selected Lot - Round* Lot : 1 - Round : 3 - Training Lab Repairs (Draft) + Add Grid + Add products & Export Grids to Excel + & Import Grids from Excel Preview Setup Items Confirm Invited Suppliers Workflow Response \equiv Actions + **RFx Settings** Solicitation Status Workflow Status Save as a template Draft RFx Type* Θ-Quick Quote Solicitation Name* Training Lab Repairs Lot # 🛈 Round # 🛈 Posting Approval Required? Amendment?* 1 3 **Commodity Suppliers** Suppliers Notified ● Yes ○ No

🔺 Note

If your solicitation does not require attachments, proceed to step 5.

Quick Quote Documents

→ 0	Selected							
	Title 🌲	Туре	\$ Att.	Contact	\$ Last Modification (UTC-4) 🜲	Creation Date (UTC-4) \\$	Validity End Date 🌲	Version
ÎI 🖋	Lab Repair Details	Public Solicitation Documents (Approved)	m	KAIZER- REQUESTER Michael		4/13/2023 2:17:54 PM		

Users should use the documents section to upload any attachments that Suppliers will need in order to submit their response.

Create a Document	
• Click Create a Document.	
Select a document type	
[Template] RFx Excel answer form Ad-hoc Solicitation Document Confidential Documents Evaluation Documents Pre-Solicitation Assessment Documents Public Evaluations Documents Public Proposals Public Solicitation Documents RFx Commercial Documents RFx Technical Documents	
Select a document type . For most	t documents attached to a quick quote, users can select Publ

ect Public Solicitation Documents. qı ote,

Title			
Title*			

• Input a document Title. This is the name of the document that will appear within OhioBuys.

Information				
Status*				
Approved	O -			
1				
③ @ Click or Drag to add files	(Public file)			

• Use the Click or Drag to add files button to either drag the attachment from your desktop, or search for it in the File Explorer.



• After uploading the attachment, click Save & Close.

Repeat the above process as required to upload any additional documents.

🔺 Note

All documents uploaded to the documents section of the quick quote will be posted to the public. Users should be careful not to attach any internal-facing files to the solicitation.

Submit



Sending a Solicitation Invitation

Complete the following steps on the displayed pop-up window:

	Send Close	Send and close			
Files to attach					
RFx documents Exce	97-2003 quotation form (xls)	Excel 2007-2010 quotati	ion form (xlsx)		
Send to					
~					
Company Name	Sending modes User				
	Add Supp	lier Contact(s)			
CINCINNATI ASSOCIATION FOR THE BLIND	Email 🛛 •	0.	+		
	÷ (KOELLMAN RACHEL 🔎			
1 Record(s)			\$		
Copy all team members					
Copy all team members					
Copy all team members Email Subject					
Copy all team members Email Subject OhioBuys: Solicitation Invitation: Quick Quote 4/21/2	123 S	nd me a copy			
Copy all team members Email Subject OhioBuye Solicitation Invitation: Quick Quote 4/21/2 Dear (Scontact, Instrame); (Scontact, Lastrame);	D23	nd me a copy			
Copy all team members Email Sobject OhioBuye: Solicitation Invitation: Quick Quote 4/21/2 Dear [Scontact, Instname]; [Scontact, Lestname], You are invited to participate in an OhioBuye solicitati	1223 Sr n: Quick Quote 4/21/2023.	nd me a copy			
Copy all team members Email Sobject OhioBuye: Solicitation Invitation: Quick Quote 4/21/2 Dear [Scontact, Instrame]; [Scontact, Lastname]; You are invited to participate in an OhioBuys solicitatis This opportunity will close on 4/22/2023. Please click	723 S r: Quick Quote 4/21/2023. here to navigate to the event.	nd me a copy			
Copy all team members Email Stelect OnioBuye: Solicitation Invitation: Quick Quote 4/21/2 Dear (Scontact, finitrume) (Scontact, Lastrame), You are invited to participate in an OhioBuye solicitati This opportunity will close on 4/22/2023. Please click Event Details:	123 S In: Quick Quote 4/21/2023. here to navigate to the event.	nd me a copy			

1. Select the files you would like to attach to the invitation to bid email.

2. Confirm the Bidder and/or Supplier list. Note that if a Supplier does not have a Supplier Contact in OhioBuys, you will need to deselect that Supplier by unchecking the checkbox to its left, and will need to contact the Supplier outside of OhioBuys.

3. Revise the email Subject and Text as necessary. Be sure to check off **Send me a copy** as this will make it easier to copy and paste the message text for any emails to Bidders and/or Suppliers sent outside of OhioBuys.

🔺 Note

- Once a solicitation is posted, it will also become available on the OhioBuys Public Portal unless the Publicly Post Opportunity checkbox has been unchecked. This means that the solicitation is visible to **all** Suppliers regardless of whether or not they were invited to participate.
- Alternative methods in OhioBuys to view and get a copy of the Solicitation Invitation email:
- 1. Click the **View Solicitation Activity** tab, click on the link in the **Email** column for one of the suppliers, from the Sent Email screen click the email link under the Subject column to view and save a copy of the email.
- 2. Click the **Workflow** tab within the Prepare Solicitation tab, scroll down to **Mail History** section, click the email link in the Subject column for one of the suppliers, and view and save a copy of the email.

Send & Close

6. Click **Send & Close**, and click **OK** in any pop-ups that appear.

Send and close



Creating and Awarding Quick Quotes in OhioBuys Releasing a Quick Quote Solicitation



The solicitation has now been posted. To confirm its status, on the Prepare Solicitation tab confirm that it has both a Solicitation Status and a Workflow Status of Open for Bidding.

RFx Settings			
Solicitation Status		Workflow Status	
Open for Bidding	Save as a template	Open for Bidding	
RFx Type	_	-	
Quick Quote			
Solicitation Name*			
Quick Quote 4/21/2023			
Lot # ①	Round # ③	Amendment?*	
1	1	No	Θ-

The workflow for a posted solicitation should resemble the image below:



If the **STS** or **MMA** slider is engaged on the **Add Suppliers** tab on your quick quote, all of the dealers associated with the contract will be automatically notified when the solicitation is posted.

A Note

Once a solicitation is posted, Suppliers will be able to access it from the Public Solicitation page. Before Suppliers can respond to the solicitation, they will be required to complete the following acknowledgement and then indicate if they will or will not bid. Supplier acknowledgements can be tracked on the View Solicitation Activity of a solicitation.

Acknowledgement	
By clicking the below "I Agree", you are ag	reeing to the following:
2. If this solicitation includes terms an 3. If this neither references a current of	a minute product control of the solicitation will apply. Conditions, the terms of the solicitation will apply. ontract nor includes terms and conditions attached to the solicitation, you are agreeing to the State Standard Terms and Conditions linked below.
Read State Terms & Conditions	
I Agree	
	Receipt acknowledged on 3/2/2023 2:59:29 PM (UTC-5)
	To answer to this RFx, please confirm that you intend to bid.
	○ WILL BID: our intent is to respond to this RFx.
	NO BID: we will not be able to respond to this RFx.
	Submit

To future date a solicitation start, enter a Begin Date that is in the future. When posting the solicitation, click Cancel in the pop-up window that appears. Doing so will block the Suppliers from bidding until the future Begin Date is reached, thereby future dating the solicitation.

▲ Step-by-Step Instructions for Sending Notices To Additional Bidders Note

The Inquiry tab of the solicitation has a "notice" message type that allows users send communications to external emails. Follow this process to send bid notification to additional bidders that do not have OhioBuys contacts. Note, this additional notice should occur shortly after posting the solicitation.

Prep Stage

1. Gather the list of additional bidders.

2. Format all emails in a chain, separated by a semicolon (;). Do not use any spaces in between emails. Ex.david.colopy@das.ohio.gov;randall.dublikar@das.ohio.gov;curtis.brooks@das.ohio.gov

3. Have this file open and available at the time you post your solicitation (will be copy & pasting this later)

Posting

1. Approvals are obtained, posting dates are updated, and you are ready to advertise.

2. Click Send.

3. Scroll down on the popup to the language of the message. Copy the text of the message except for the heading ("Dear {\$contact_firstname} {\$contact_lastname}")

	٥	
© Source] & ∰] X ∱ @ @ @ < > Q t 3 ₩ 31 0 0 1 1 5 5 5 5 0		
B I U 5 x _e x ¹ √ I _e □ □□ □ □□ □ □□ □ □ □ □ □ □ □ □ □ □ □ 0 □ □ □ □	- C)	
Dear (\$contact_firstname) (\$contact_lastname),		
You are invited to participate in an OhloBuys solicitation: Violence and Injury Prevention Evaluation Services. This opportunity will close on 3	/11/2022.	
Please click here to navigate to the event.		
Please click here to navigate to the event. Event Details:		
Please click here to navigate to the event. Event Details: Solicitation Name: Violence and Injury Prevention Evaluation Services Solicitation ID:		
Please click here to navigate to the event. Event Details: Solicitation Name: Violence and Injury Prevention Evaluation Services Solicitation ID: SRC0000002385		
Please click here to navigate to the event. Event Details: Solicitation Name: Violence and Injury Prevention Evaluation Services Solicitation ID: SRC0000002885 Main commodity: Health administration services Lot #: 1 Round #: 2 Contracting Entity:		
Please click here to navigate to the event. Event Details: Solicitation Name: Violence and Injury Prevention Evaluation Services Solicitation ID: SRC000002385		

4. Click Send and Close, along with confirming the two pop-ups for notifications and posting to the site.

Step-by-Step Instructions for Posting a Solicitation Note

Navigate to the Inquiry tab and click Compose.



Update the Message Type field to Notice by selecting it from the drop-down menu.

In the Recipients field, select **Responsible – Sourcing project**.

Enter the emails of the users you would like to invite in the **External Emails field**, separated by a ";" – note that you should not put a space between emails after the semicolon.

Complete the **Subject** field and fill in the body of the message with the copied text from posting the solicitation. Note that if you did not copy the text from the initial notice (step 3 of Posting), you can retrieve the language from the View Solicitation Activity tab.

Click Send.

Notice		 Send me a copy
Price Alex		
Send To		
Recipients * (i)	External Emails ①	
Subject *		
Click or Drag to add files	A Send	Tencel

Your message will be delivered to the email addresses indicated informing them of the solicitation in OhioBuys. Note that prospective Bidders and/or Suppliers will need to register in OhioBuys in order to submit a response.

A Step-by-Step Instructions for Posting a Solicitation that is not Publicly Posted Note

Alternative methods in OhioBuys to view and get a copy of the Solicitation Invitation email:

1. Click the View Solicitation Activity tab, click on the link in the Email column for one of the suppliers, from Sent Email screen click the email link under the Subject column to view and save a copy of the email.

2. Click any subtab within the Prepare Solicitation tab, scroll down past the Workflow to Mail History section, click the email link in the Subject column for one of the suppliers, and view and save a copy of the email.

▲ Step-by-Step Instructions for Sending Notices To Additional Bidders Note

Additional Bidder Notification:

1. The solicitation is now posted. Navigate to the Inquiry tab.

- 2. Click Compose.
- 3. Change the Message Type to Notice.
- 4. Select yourself as the recipient
- 5. Paste the text copied from step 3 above into the message text.
- 6. List the SRC Number and "Solicitation Notification" in the Subject field.

7. Add the list of additional bidder emails, formatted with no spaces & separated with a semicolon, and past into the external email box.

Creating and Awarding Quick Quotes in OhioBuys Releasing a Quick Quote Solicitation

flessage Type *		
Notice	,	 Send me a copy
		Ξ
Oswald James		
Send To		
Recipients * 🛈	External Emails 🛈	
> Responsible (Sourcing Project)- OSWALD James ×	david.colopy@das.ohio	
Subject *		
SRC2385 Solicitation Notification	tion	
You are invited to participate i Violence and Injury Prevention opportunity will close on 3/11 Please click here to navigate to	n an OhioBuys solicitation: n Evaluation Services. This /2022. o the event.	
Event Details:		
 Solicitation Name: Viole Evaluation Services Solicitation ID: SRC0000002385 Main commodity: Healt Lot #: 1 Round #: 2 Contracting Entity: DAS-Administrative Service 	ence and Injury Prevention h administration services rvices	

8. Click Send.

If you do not copy the text from the initial notice (step 3 of Posting), you can retrieve the language from the View Solicitation Activity tab.

For details on subsequent steps in the quick quote process, refer to the following assets:

Award a Quick Quote Solicitation

Update a Purchase Requisition with a Quick Quote Award

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

OhioBuys Cancelling a Solicitation

Updated: 01/07/2025 06:13 PM

Version: 9.0

Purpose & Profiles

This job aid covers the process of canceling a solicitation.

Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, Procurement Manager, Agency Sourcing Associate

Used When

Reference this when attempting to cancel a solicitation.

Navigate to Sourcing Projects

1. Log in to OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

Sourcing	Contracts	Shop
Sourcing P	rojects	
Create	e Sourcing Proj	ect
Sched	ules	
Price Mana	agement	
Create	e	



Creating and Awarding Quick Quotes in OhioBuys Cancelling a Solicitation

Open Solicitation



Create a New Round

5. The new round will default to copying all information from the previous round. Click **Save & Close** to make a new round.

Save & Close	
Warning	
Do you really want to apply these changes ? • 9 columns will be added. • 3 items will be added. • 4 questions will be added.	



The following window will appear afterwards. Click **Continue** to apply changes.

Update Rfx Type



Update the Amendment Field

7. Click the Amendment field and update the field to Yes.





Creating and Awarding Quick Quotes in OhioBuys Cancelling a Solicitation

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40.4

O

Update Sourcing Dates

8. Click the Begin Date to set a future date and time, and set the Closing Date to some time after the Begin Date.

Open and Closure (i)

Begin Date	
iiii 9/11/2023	12:00:00 AM 🕓 👻
Closing Date*	
m 9/21/2023	12:00:00 AM 🕑 🗸



Update Sourcing Dates Cont.

9. Click the Inquiry Begin Date to set a future date and time, and set the Inquiry End Date to some time after the Inquiry Begin Date

		Setup Project		Save & Close	B Save
		 Inquiry 			
		📋 Project Schedule		Workflow Status	_
		i≡ Requirements Gathering	Save as a template	Draft	
Inquiry Period (i)		-D Setup Documents	0	•	
inquiry i chou	9	Re Add Suppliers			
		🖿 Prepare Solicitatio	Round # (i)	Amendment?" Posti	Posting Approval Re
		View Solicitation activity	5	Yes O	
Inquiry Begin Date		🛨 Analyze & Award			
		2 Review Award Res	its		
	1200-00 4140	Reverse Auctions		_	
	12:00:00 AM	[Site map][Legal mention	4		
Inquiry End Date*					
+ 0/20/2022	12:00:00 414 0				
m 9/20/2023	12:00:00 AM				

OhioBuys

Create a Public Cancellation Notice

10. In the **Summary** field, enter any public notes.

Summary





Creating and Awarding Quick Quotes in OhioBuys Cancelling a Solicitation

Save Cancellation Round


Creating and Awarding Quick Quotes in OhioBuys Cancelling a Solicitation

Send a Cancellation Round



Modify the Supplier Contacts as necessary. The listed contacts are the recipients of the cancellation notice.

Send and close

Click **Send and Close** to finish the cancellation of the solicitation and the ensuing notification.

🔺 Note

When a solicitation is cancelled, any previously submitted responses can be accessed and reviewed by opening the desired round or lot.

Sourcing project: SRC0000001184 - Opus Demo - Prepare Solicitation: Ohio

14. Click **OK** to complete the process.



Sourcing project: SRC0000001184 - Opus Demo - Prepare Solicitation: Ohio

15. Click **OK**. This brings us to the end of our interactive simulation.

Onobuy	Ki x Opus Dellio	Click OK to open the bio	iding period		8 U A	analysis (6
< 10 合			• <u> </u>	15		7 8
	Send to					1
😂 Setup Team						-
💁 Inquiry	Company Name	Sending modes	User			
			Add Supplier Contectle)			
I Requirements Gathering	 BROWN ENTERPRISE SOLUTI 	ONS LLC Email O -	0 -			· · · · ·
			Brown George)
Re Add Suppliers			Add Supplier Contact(s)			
Prepare Solicitation	 CAREWORKS TECHNOLOGIES 	Email O -	0-			2:00:00 AM 🔿 👻
> View Solicitation			Careworks Kurt			15:00 PM (0 *
			Add Supplier Contact(s)			
T Analyze & Award	 ROLKA LOUBE SALTZER ASSO 	CIATES Email Ø •	0 -			

If you have questions or need additional assistance, please contact the OBM Contact Center via email (<u>OBM.ContactCenter@obm.ohio.gov</u>) of phone (877-644-6771).

Analyzing and Awarding a Quick Quote Solicitation

Topics

- Analyzing and Awarding a Quick Quote Solicitation
- Update a Purchase Requisition with a Quick Quote Award

OhioBuys Analyzing and Awarding a Quick Quote Solicitation

Updated: 07/18/2024 08:30 PM

Version: 7.0

• Purpose & Profiles

This job aid covers the process of comparing Bidder and/or Supplier responses to a quick quote solicitation and making an award. **Profiles**: Requisitioner, Requester (with the Quick Quote Procurement User profile)

Used When

Reference this when determining the award for a quick quote solicitaiton.

For details on previous steps in the quick quote process, refer to the following assets:

Create a Quick Quote Solicitation Identify Bidders and Suppliers for a Quick Quote Release a Quick Quote Solicitation

Prepare Solicitation

1. Open the solicitation in OhioBuys and navigate to the **Prepare Solicitation** tab.





Begin Evaluation

2. Click Begin Evaluation.





Creating and Awarding Quick Quotes in OhioBuys Analyzing and Awarding a Quick Quote Solicitation

Unseal the Bids



🔺 Note

If you have not received enough responses to proceed with awarding the quick quote, you can extend the solicitation period by creating a new round. This process is discussed in more detail in <u>Creating and Issuing New Lots or Rounds</u>.

Analyze and Award

From the Analyze and Award tab, users can review a summary of each submitted response, download responses, compare responses by item, and make an award.

	3 Invited Suppliers			Tota	3 Il Proposals Submitted	:	Supplier(s) Who	0 Haven't	Logg	ed In Y
→ 0	Selected	Downloa	d selected pro	posals	Compare Quotes by Ite	m				
	Suppliers \$	Proposal 👙	Status 💠	Documents	Proposal Progress	Submitted (UTC-4) 👙	Total (i)	Deci	sion	\$
Î 🗌	INSIGHT PUBLIC SECTOR INC	Proposal # 1	Submitted		100%	4/13/2023 2:33:53 PM	12,800.000 USD	н	\odot	Ŧ
<u> </u>	CAREWORKS TECHNOLOGIES	Proposal # 1	Submitted		100%	4/13/2023 2:33:04 PM	12,000.000 USD	Ш	\odot	Ŧ
â 🗌	ASSETWORKS LLC	Proposal #	Submitted		100%	4/13/2023 2:32:27 PM	13,075.000	Ш	0	Ŧ

- Awards cannot be made until the solicitation end date has been reached. To view the full details of a response, click on the associated **Proposal** hyperlink.
- While reviewing the summary of responses displayed in the table on this tab, you may notice some responses have a **Proposal Progress** of less than 100%. This indicates the response may contain a quote for an alternate item or may have only submitted quotes for some of the items in your quick quote solicitation.
- To download all of the responses or compare responses by line item, click the Select All Checkbox () icon and then click Download selected proposals.
- To compare response by item, click the **Select All Checkbox** () icon and then click Compare quotes by item. A pop-up window will appear. From here you can select the item you would like to compare and then click **Compare Proposals**.

Award Justification

5. Navigate to the **Award Justification** section of the Analyze and Award tab.

		-		
		3 Invited Suppliers		Tota
-	• 0	Selected T	🗎 Downloa	d selected proposals
		Suppliers \$	Proposal \$	Status
Û		INSIGHT PUBLIC SECTOR INC	Proposal # 1	Submitted
Û		CAREWORKS TECHNOLOGIES	Proposal # 1	Submitted
ŵ		ASSETWORKS LLC	Proposal # 1	Submitted

				7											-
く "9 ☆	Sourcing pr	oject: SRCO	0000			b Repairs - A	Analyze & Awan	1		Q	Search	b		H.	θ
«د							Save & Clo	se 🛛 Save							
J Setup Project															
A Setup Team	D Proposa	A Scenari	los [Award Justit	cation	1									
Inquiry															
Add Suppliers		,	2				2			0					
Prepare Solicitation		in the second	5			7.0	3		Consultante Miles	0			From Frede	Uniter De)
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Analyze & Award		3 Selected	٣	B Dov	micad select	ed proposals	Compare Quotes I	by Item							
Review Award Results	-	Suppliers	0	Proposal o	Status o	Documents	Proposal Progress	Submitted (UTC-4) c	Total ()	Decision	0	MBOD Status	Debarment E	nd Date of	A
		INSIGHT PUB SECTOR INC	uс	Proposal #	Submitted		100%	4/13/2023 2:33:53 PM	12,800.000 USD		Ŧ				
		CAREWORKS	i IES	Proposal #	Submitted		100%	4/13/2023 2:33:04 PM	12,000.000 USD	N O	Ŧ				
		ASSETWORK	5	Proposal #	Submitted		100%	4/13/2023 2:32:27 PM	13,075,000 USD	N O	Ŧ				
	3 Reci	ord(s)													
			_	_	_				_	_	_	_	Obiev2	10 200	-

Creating and Awarding Quick Quotes in OhioBuys Analyzing and Awarding a Quick Quote Solicitation

Select Justification



Award Explanation

Award Explanation*

Lowest responsive and responsible

7. Add additional **Award Explanation** comments. For STS quick quotes, the values input to this field will be pulled into the quarterly STS Report produced by DAS and submitted to the Controlling Board.

OhioBuys	Suppliers Sourcing Contracts Shop Procurement Release & Permit Analytics Public Request Admin	🛆 🗘 \varTheta Μctael Κ. 👻 🔘
く つ ☆	Sourcing project: SRC000001093 - Training Lab Repairs - Analyze & Award	Q, Search 🗎 🗮 🖨
*	Sirve & Close 🛛 🔒 Sirve	
18 Sebus Team		
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Add Supplers	Lot : 1 - Round : 2 - Training Lab Repairs (Unde	
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View Solicitation	Proposio agricumos Anna Abr	
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Review Award Results	4	
Site map[[Legal mentions]		Ohio v3.0 C Training New

🔺 Note

Users must perform a quick quote prior to referencing an STS contract on a requisition. A quick quote must be in OhioBuys for purchases referencing an STS contract because DAS will use quick quote data to populate the STS Report submitted to the Controlling Board; if there is no quick quote, the data required for this report will not be captured. The justification for selecting an STS Contract Supplier must be documented in the award justification fields.

Save



Creating and Awarding Quick Quotes in OhioBuys Analyzing and Awarding a Quick Quote Solicitation

Proposals

OhioBuys · 0 A 4º 0 9. Return to the Proposals section of the Analyze and Award tab. ₩ 0 9 ۵ sak 🎜 Round Lot : 1 - Round : 2 - Training Lab Repairs (Under Evaluation) Θ-Proposals Scenarios Award Justification Award Justification Award Explanation* Lowest Responsive & Responsible 🛽 😔 🗸 Lowest responsive and responsible

Award

10. Click the **Trophy** icon in the Decision column for the Bidder or Supplier for which you would like to create an award, then click **OK** in the pop-up that appears.

Award Q, South 🏋 🖨
ve & Close a Swet
0 0
britted Supplier(s) Who Haven't Logged in Yet Supplier(s) Who Declined Part
Quotes by Item
sal Submitted (UTC-4) 0 Total @ Decision 10 Decision 10 Debarment End Date 0 Agenci
7% 4/13/2023 2:33:53 PM 12,800,000 USD II O Am
7% 4/13/2023 2.33.04 PM 12,000,000 Ⅲ ◎ 🐨
7% 4/13/2023.2.32.27 PM 13.075.000 USD 用 ⊙ 型

For details on subsequent steps in the quick quote process, refer to the following assets

Update a Purchase Requisition with a Quick Quote Award

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



Updated: 06/21/2024 05:28 PM

Version: 6.0

Purpose & Profiles

This job aid covers the process for updating a purchase requisition containing either hosted catalog, or freeform line items with the results of a quick quote solicitation.

Profiles: Requisitioner, Requester (with Quick Quote Procurement User profile)

Used When

Reference this when updating a purchase requisition containing either hosted catalog, or freeform line items after having performed a quick quote.

For details on previous steps of the Quick Quote process, please refer to the following documents:

Create a Quick Quote Solicitation Identify Bidders and Suppliers for a Quick Quote Release a Quick Quote Solicitation Award a Quick Quote Solicitation

Review Award Results

1. Open the solicitation that has been awarded and navigate to the **Review Award Results** tab.





Creating and Awarding Quick Quotes in OhioBuys Updating a Purchase Requisition with a Quick Quote Award

Origin P.R.

2. To update the purchase requisition associated with this quick quote with the award details, click the **Origin P.R.** hyperlink for the Bidder or Supplier you are planning to award to.

Situp Project							-			
Setup Team	Review Award Results a	nd Take A	ction							 Progress
Re Add Suppliers	Supplier	Round				Decision				
Prepare Solicitation		- Lot : 1	Training Lab Repair	rs - Round : 2	0.		- Q	Search The		
 View Solicitation activity 										 Document
🝸 Analyze & Award	Supplier 0	Lot / Roury	d o Proposal	Decision o	Award amount	Notification	Contract		OAKS ID 0	
Review Award Results	ASSETWORKS LLC	Lot:1/Ro 2	und: Proposal #	Not selected		Not selected: to be notified		REc	ab Repairs 03	Download Zip
	CAREWORKS	Lot:1/Ro 2	und: Proposal #	Selected	12,000.000 USD	Selected : to be notified		IREQ00000045261 Training	0000067707	r+ o Sele
	INSIGHT PUBLIC SECTOR INC	Lot:1/Ro 2	und: Proposal #	Not selected		Not selected: to be notified		[REQ000004526] Training	0000085744	Heading
	3 Record(s)								٥	Instruction
	 Items synthesis 									1 Percential
	Requests © Round # c	berns	0	Supplier	© Scenario ©	Ref. Total Cost o Ta	irget amount :	Total Cost Savings	OAKS ID 0	

Update Prices

INSIGHT PUBLIC

3 R

Lot:1/F 2 Lot:1/F 2 Lot:1/F

No



Save & Close

5. Click Save & Close, then click OK in the pop-up that appears.





🔺 Note

If there is any justification documentation required for the award, please attach it to the header of the purchase requisition.

Line Item

6. The purchase requisition has now been updated. Scroll down to the line item(s) and, click on the **Pencil** icon to open it.



Order Supplier

7. Complete the **Order Supplier** and, if applicable, **Supplier Contact** fields.



🔺 Note

If there are Dealers available in the contract they will appear as the options contained in the Order Supplier field. The Supplier should remain the primary Supplier on the contract. (e.g., Supplier – HP Inc. Order Supplier – Brown Enterprise Solutions)

Two-Phase Quote Contracts

Image: Save Score Close Save S New Apply Order Supplier/Contact To All Line Items Product Cetalls Training Lab Desktop Repairs Product Contract Contract Type Product Reference CTRO01316 - Price Management Contract - Court Reporter Amendment #1 CTRO01316 - Price Management Contract - Court Reporter Supplier Item Ref. Vinimum Order Quantity Attachments <th>Item</th> <th></th> <th>8 8 ×</th>	Item		8 8 ×
		B Save Save & Close Close Save & New Apply Order Supplier/Contact To All Line Items	
Product Details Training Lab Desktop Repairs Product Contract Contract	✓ More Item Information		
Training Lab Desktop Repairs Product Contract Contract Type I Contract Contract Type I Contract Court Reporter Amendment #I CTR001316 - Price Management Contract - Court Reporter Supplier Item Ref. Minimum Order Quantity Attachments # Click or Drag to add files	Product Details		
Product Contract Contract Sub-Type I I CTR001316 - Price Management Contract - Court Reporter Amendment #1 CTR001316 - Price Management Contract - Court Reporter Supplier Item Ref. Minimum Order Quantity Attachments	Training Lab Desktop Repairs	Ø	
Product Reference CTR001316 - Price Management Contract - Court Reporter Amendment #1 CTR001316 - Price Management Contract - Court Reporter Supplier Item Ref. Minimum Order Quantity Attachments Click or Drag to add files 	Product	Contract Contract Type Contract Sub-Type	
Product Reference CTR001316 - Price Management Contract - Court Reporter Amendment #1 CTR001316 - Price Management Contract - Court Reporter See All Minimum Order Quantity Attachments Click or Drag to add files Stanket PO Line Item ①			
Vipulate Reference CTR001316 - Price Management Contract - Court Reporter Supplier Item Ref. Minimum Order Quantity Attachments		CTR001316 - Price Management Contract - Court Reporter Amendment #1	
Supplier Item Ref. Minimum Order Quantity Attachments @ Click or Drag to add files Minimum Order Quantity	Product Reference	CTR001316 - Price Management Contract - Court Reporter	
Supplier Item Ref. Image: Click or Drag to add files Minimum Order Quantity Attachments # Click or Drag to add files		See All	
Minimum Order Quantity Attachments Click or Drag to add files Blanket PO Line Item ①	Supplier Item Ref.		
Minimum Order Quantity Attachments Click or Drag to add files Blanket PO Line Item ①			
Minimum Order Quantity Attachments Cick or Drag to add files Blanket PO Line Item ①		le le	
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If you awarding a solicitation that is for a Two-Phase Quote Contract purchase, scroll down to the More Item Information section and select the corresponding Supplier contract in the Contract field.

🔺 Note

If there are multiple line items that need to be updated, click **Save** and then click **Apply Order Supplier/Contact to All Line Items** to automatically update the Order Supplier, Supplier Contact, Delivery Date, and Attn field for all line items from that Supplier. Note that this action will have no effect on any line items that are from another Supplier.

Apply Order Supplier/Contact To All Line Items

Save & Close



Notifying Suppliers

Supplier \$	Lot / Round \$	Proposal	Decision \$	Award amount	Notification	Contract	Origin P.R.
LOTT INDUSTRIES INC	Lot : 1 / Round : 7	Proposal # 1	Not selected		Not selected: to be notified		[REQ0000105965] Req. 2/27
LOTT INDUSTRIES INC	Lot : 1 / Round : 7	Proposal # 2	Selected	1,000.000 USD	Selected : to be notified	Create/Update a contract	[REQ0000105965] Req. 2/27

While not required, users can notify Suppliers of the results of a quick quote solicitation from OhioBuys. Navigate to the **Review Award Results** tab of the quick quote solicitation. In the **Notification** column, click on **Selected: to be notified** or **Not selected: to be notified** to generate an email notification for the selected Supplier.

🗟 Send 🖉 Send	Close
ssage	
Send to	
Company Name © User	
LOTT INDUSTRIES INC MENKETIN *	 ctts) ~ A
1 Record(s)	\$
1 Record(s) Copy all team members	\$
1 Record(s) Copy all team members Email	*
1 Record(s) Copy all team members Email Subject	*
1 Record(s) Copy all team members Email Subject OhioBurys: Solicitation update: [RFX_BUSINESS_PROJECTS_CODE]	*
Record(s) Copy all team members Email Subject OhioBuys: Solicitation update: (RFX_BUSINESS_PROJECTS_CODE) Attachments	*
1 Record(s) Copy all team members Email Subject OhioBuys: Solicitation update: (RFX_BUSINESS_PROJECTS_CODE) Attachments O	Send me a copy
	Send me a copy Sand is pleased to award this solicitation to LOTT INDUSTRIES INC. Indies under this Contract.
	Send me a copy Sand is pleased to award this solicitation to LOTT INDUSTRIES INC. plies under this Contract. courses
	Send me a copy Send me a copy and is pleased to award this solicitation to LOTT INDUSTRIES INC. plies under this Contract. EFINED.
	Send me a copy Send me a copy and is pleased to award this solicitation to LOTT INDUSTRIES INC. plies under this Contract. EFINED.

Select at least one **Supplier Contact** and then edit the notification email as needed. Attachments can be added as well as copy sent for personal records. Click **Send & Close** to send the email.

🔺 Note

Once the purchase requisition has been processed into a purchase order, users should move the quick quote from an Under Evaluation status into a Closed status. To do this, navigate to the **Prepare Solicitation** tab of the quick quote and click **Approve**.



Note that you will not be able to update the award after moving a quick quote into a Closed status.

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

Creating a New Round

Topic

• Create and Issue New Lots and Rounds

OhioBuys Creating and Issuing New Lots and Rounds

Updated: 01/07/2025 06:09 PM

Version: 5.0

• Purpose & Profiles

This job aid covers the process for creating new lots and rounds for a solicitation in OhioBuys.

Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, Procurement Manager, Agency Sourcing Associate

┛ Used When

Reference this when creating a new lot or round for a solicitation in OhioBuys.

Navigate to Sourcing Projects

1. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.

Sourcing	Contracts	Shop
Sourcing P	rojects	
Create	e Sourcing Proj	ect
Sched	ules	
Price Mana	agement	
Create	9	

	senato	Create 5	iourcing Project									
く つ ☆	Administ	Scheduli	es.	1						Q, Search	賣 班	Ⅲ (
1	My pending va	Price Manage Create	erert			See 20 results	Welcome					
4							The selected	content contains no te	1			
Manage Users	Workflow	 Activity 	 Object 		Due date	o History						
	OH REx Workflow	Ad-hoc Approval	8FP000000 8/3/2023	11771 - JTL Sourcing Project								
Configure Profiles	Standard Regulation Workflow	EITC Anal Superviso	REGODDOD DPS20000 FATROL - C	04639 - Reg. 7/12/2023 0 - OHIO STATE HIGHWAY Xai Siman)								
•	Standard Resulsition Workflow	Requester Superviso	REQ00000 Stations ID Forestry DR	04615 - DNR - Docking NR150000 DNR -Division of RDDL - Training								
anywar cons	My Recent Act	ivity for Pur	rchases			See 5 results						
k Import Data	P	o DID o	Supplier o	Purchase Regulation ©	Ontered ()	Received ()						
Configure Workflows	× 0 🔺 🖻	000001000	CINCINNATI ASSOCIATION FOR THE BLIND	Reg 4/54/2023	69,480							
•	78 A P	000000998-1	CINCINNATI ASSOCIATION FOR THE	Amendment request 4/13/2023	47.520							

Search Sourcing Projects

2. The Sourcing Projects page is displayed. On this page, you can enter search terms to locate your solicitation. Enter search terms in the Keywords search field and then click **Search**. By default, the search results on the Sourcing Projects page are filtered to only show projects relevant to your scope.

🔺 Note

You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the **More Filters** (**T**) icon.

Q, Search	Reset
ls a template	
Contact	
	•
Supplier	
	•
MBE Set As	side
Contracting Entity	
	-
Participating Organiz	ations
	•
Index Number	
RFx Type	
	•
Solicitation Status	
	-

Pencil Icon

3. Open the sourcing project you would like to edit by clicking the **Pencil** (\checkmark) icon.



Creating and Awarding Quick Quotes in OhioBuys Creating and Issuing New Lots and Rounds

Prepare Solicitation



🔺 Note

Once you have selected which you would like to create, the process for creating a new lot or round is the same.

Commodity and Contracting Entity



Creating and Awarding Quick Quotes in OhioBuys Creating and Issuing New Lots and Rounds

Copy Options

7. Confirm the options that should carry over from the original RFx. You can also choose to leave a section blank, or populate the section with the default from the RFx type.

Copy Options ()			1
Choose what to copy			
	Blank	Default from RFx Type	Copy from selected RFx
Setup Tab	0	0	۲
Item Columns	0	0	۲
Questionnaire	0	0	۲
Documents	0	0	۲



🔺 Note

The **Setup Tab** selector will determine whether or not the Advanced Options from the original RFx carry over. Users should carefully consider whether to retain this field.

Create



🔺 Note

When creating a new round for a double or triple envelope solicitation, the sourcing responsible can elect to copy over the proposal status from the previous round or un-validate the proposals, and can choose to include only Suppliers with accepted proposals or all invited Suppliers.

nvelope Options	
uppliers to Copy*	
Only suppliers with accepted proposals	0-

Open & Closure and Inquiry Dates

10. A new lot or round has been created. Make any necessary updates to the **Open & Closure** and **Inquiry Dates** by clicking the fields and selecting the date(s).

•	Aug		✓ 202	3	~				Septe	ember 20	23		⊛
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
30		1	2	3	4	5		28	29	30		1	2
6	7	8	9	10	11	12	3	4	5	6	7	8	9
13	14	15	16	17	18	19	10	11	12	13	14	15	16
20	21	22	23	24	25	26	17	18	19	20	21	22	23
27	28	29	30	31	1		24	25	26	27	28	29	30
		1		+1	+7		+14	+1N	4	+3M			



Amendment

11. Update the **Amendment** field to **Yes** or **No** depending on the reason the new round or lot is being created by clicking the field.

Amendment?*	
	-
Yes	
No	



Creating and Awarding Quick Quotes in OhioBuys Creating and Issuing New Lots and Rounds

Public Post Opportunity

12. Scroll down on the solicitation. In the **Advanced Options** section, if you are <u>not</u> posting clarifications be sure that the **Public Post Opportunity** checkbox is checked.

- Advanced Options (i)
- Publicly Post Opportunity



Summary

13. Enter the reason for the new lot or round in the **Summary** field.

Summary

i			



Save

14. Click Save.





🔺 Note

If you are creating a new lot, you should indicate whether or not the lot is a clarification using the Is a Clarification checkbox

If the lot is a clarification, the Sourcing Responsible user is able to manually close the solicitation prior to the scheduled close date once clarifications have been received

When conducting Agency Competitive Selection purchases in OhioBuys, the need to conduct clarifications with a supplier(s) may arise. Users should create new lots to conduct these clarifications, not new rounds. Once the required information has been gathered from the applicable supplier(s), users should proceed with awarding the round that suppliers originally submitted their proposals for, not the lot that was used to conduct the clarification.

This will ensure that the resulting contract is tied to a solicitation that meets the quoting requirements.

If the Inquiry Begin Date is not populated by the user, it will automatically match the solicitation posting date once the solicitation is open for bidding, however, users must always manually input the Inquiry End Date

If not populated by the user, the Publication Begin Date will automatically populate to match the Begin Date of the solicitation, and Publication End Date will automatically populate with a date one year after the solicitation closing date



Documents



Creating and Awarding Quick Quotes in OhioBuys Creating and Issuing New Lots and Rounds

Confirm Invited Suppliers

16. Navigate to the **Confirm Invited Suppliers** tab and select the Suppliers you wish to include in the new lot or round.

	Confirm Invited Suppliers
~	Invited Suppliers
~	3M COMPANY
~	KPMG LLP
	IBM GLOBAL SERVICES



Submit

17. Continue to update the solicitation as necessary to capture the details of the new lot or round. When you are finished, click **Submit**.

Submit



🔺 Note

- Issuing a new round or lot will retrigger the solicitation approval workflow.
- If a new lot or round is issued, Suppliers will need to resubmit their responses. Please ensure that this is communicated clearly to your participating Suppliers as appropriate. For instructions on how to quickly resubmit a response, please direct Suppliers to the Viewing and Responding to Solicitations Learner Guide.

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

Answering Supplier Questions

Topics

• Answer Supplier Questions

OhioBuys Answering Supplier Questions (Inquiry)

Updated: 07/31/2024 02:37 PM

Version: 8.0

Purpose & Profiles

This job aid covers the process of answering Supplier questions.

Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, Procurement Manager, Agency Sourcing Associate

┛ Used When

Reference this when needing to answer Supplier questions.

🔺 Note

When a Bidder or Supplier submits an inquiry, the user responsible for the solicitation will receive an email notification and can view the question. They then can "unlock" the question for edit by forwarding. They can forward to any teammate on the team.

Navigate to Sourcing Projects

 Log in to OhioBuys. From the Main Menu Navigation bar, clicd Sourcing and then select Sourcing Projects from the drop-down menu.
 Sourcing Contracts Shop
 Sourcing Projects
 Create Sourcing Project
 Schedules
 Price Management Create

< 5 13	Contract Searcing Projects Orester Searchard Project					Q. Search	я
? Need Help Getting Surfact'	Welcome! Pro		+150 DBR conded within 222-days	0 DSR	My Open Scheduled Task List		
Drowse Sourcing			1 Boquines for Homepope	+150 Exceptions			
Q Browne Contracts	1 0 My Drahad Contracts Contracts	5 Ny Company	9	+150 Rokasa & Permit			
Cruster Contract							
Contract RPIs	My pending validations			See 20 reads			
Cause	Woldow	o Activity o Object	Due date a	History			
	OH Contract Authoring Workflow	Don hot-hot-4					
P /	OH Contract Authoring Modellow	Draft Next - text 3					
Marter Chusen	Child Constract & Advances Weekflow	Dott Not-test					
							_

Open Solicitation



4. All Supplier-submitted inquiries are listed. Search for specific questions by using the **Keywords** search field. Click anywhere on a question line to open the question.

eywords	
	Q Search

🔺 Note

You can also search for projects based on a variety of filters including commodity, workflow status, contact, Supplier, contracting entity, participating organizations, index, RFx type, solicitation status, Sourcing Project Start Date, Solicitation Date Range, or whether or not the solicitation has been designated for MBE set-aside. To access additional filters not pictured, click the More Filters (T) icon.

< Sourcing project: SRC000000	01116 - Mediation Services - Inquiry		Q. Search	жə
ec Solup Project	Sove & Close B Sove			
Setup Team Action to Post				
Add Suppliers	Do you need to Remove Public Footings?			
# Pest Inquiry to Public Prepare Solicitation				
Vex Solchaton activity Inquiries		Add a Task		
Analyse & Research		Document		
	0. Search Reset Advanced Search	A Research		
Conges	3 Message History			
M 0 Subject 0	Messages Last update 3/TC-4 = Original sender = Last sender = Message Type = Publicly Ported	•		
216 Software Questions	1/1 9/21/2023 11:12:34.AM Additional Additio			
1 Records)	0			

Creating and Awarding Quick Quotes in OhioBuys Answering Supplier Questions (Inquiry)

Begin the Inquiry Response Process

5. The question is displayed. To respond to the question, a user must first click the **Forward** icon.

	Assetworks John (ASSE
e	nd To
)	Recipients
	SME (Sourcing Project)-TRAINING
	DASContractAnalyst10, Responsible (Sourcing Project)-
	TRAINING DASContractAnalyst10
C	Does the State have a preferred
tı	raining development software that
	ve should use for this project? (e.g.
V	



Forward Icon: 🜧

Update Inquiry to a Public Response

6. Select **Public Response** for the **Message Type**. This will post the Supplier's question publicly so that other Suppliers are able to see the State's response.

Inquiry	0 -
Public Response	
Notice	



Sending an Inquiry to the Responsible User



Update Supplier Inquiry

8. Update the Supplier's question as necessary to remove any sensitive or identifying information as well as correct any grammatical mistakes. Click **Send** when finished.

Recipients ①*		External Emails ①
Responsible (Sourcing Project)	0 -	
ubject*		
Software Questions		
	e a prefer	red training development



A Send

Select Forwarded Message



Continue the Inquiry Response



Answer the Supplier Inquiry

1. Enter the answer/response to the Supplier question in th	e ChioBuys Sealer Sorr C S & Sourcing proje	ning Cresses Bras Procenness Belance Anness Public Brasel Annes Corte ett. SRC0000001116 - Mediation Services - Inspily See 6.000	A. G ^O 😧 Docent G. Seret	таканафизэт • 🕻 Тт 🕀
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🔺 Note

If you are adding an attachment as part of a response to an inquiry, then embed the attachment in the free text entry field.

Creating and Awarding Quick Quotes in OhioBuys Answering Supplier Questions (Inquiry)

Select Recipients

12. Select the **Recipients** of the response. You can choose internal contacts on the project team and Supplier contacts.

	Recipients ()*	
Í	> SME (Sourcing Project)-TRAINING DASContractAnalyst10 ×	© -
	> Responsible (Sourcing Project)- TRAINING DASContractAnalyst10 X	
1	All internal team members	
	SME (Sourcing Project)	
	> SME (Sourcing Project)-OBI Simon	



Distribute Inquiry Answers

Responsible (Sourcing Project)



Post Inquiry Answers to the Public

15. Click **Post Inquiry to Public**. This will post publicly all of the questions and answers with the public response type.

E Save	
Post Inquiry to Public	

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			_

🔺 Note

Inquiry responses that have been posted to the public can be marked as replied.

1. In the **Inquiries** header, click the Inquiry line item.

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Public		8/2/2020 1	0.54.25	Will	Will		

2. In the Subscription details header, click the Checkmark (🖌) icon to mark the inquiry as replied.

bscr	iption details
	Kumar Induri Naresh (EX
Se	end To Recipients
	Responsible (Sourcing Project)-LEWIS Kimberly
	Could you please confirm

🔺 Note

Any responses posted for a previous round of a solicitation will remain visible to the public in the event that subsequent rounds are created.

For solicitations that have not been publicly posted, the sourcing responsible can follow the above process to respond to any Supplier inquiries. The responses will display in the solicitation overview for all Suppliers that have been invited to the solicitation.

🔺 Note

Inquiry responses that have been posted to the public can be removed if required.

1. In the Do you need to remove public postings drop-down menu, select Yes.

Action to Post		
Post Inquiry to Public	Do you need to Remove Public Postings?	
	Yes	· ·
	No	Add a Task

2. A new **BPM Public Inquiries - Please Save After Populating** drop-down will appear. Select the post(s) that you want to remove from the drop-down menu.

	Action to Post		
	Post Inquiry to Public	BPM Public Inquiries - Please Save After Populating	Do you need to Remove Public Postings? Yes •
3. Click Save .			
		Save	
4. Click Remove Public Postin	g.		
		Remove Public Post	ing

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

Updating a Purchase Requisition with an Existing Quick Quote

Topics

• Updating a Purchase Requisition with a Quick Quote Award



Updated: 06/21/2024 05:30 PM

Version: 4.0

Purpose & Profiles

This job aid covers the process of linking an existing quick quote to a new purchase requisition.

Profiles: Requisitioner, Quick Quote Procurement User

Used When

Reference this when there is a need to either create a new copy of the purchase requisition that references a previously conducted quick quote, or if a quick quote was created without an initial purchase requisition.

🔺 Note

Note that the process outlined in this section should generally be leveraged if a solicitation created from a purchase requisition has already been conducted, and there was a problem with that purchase requisition that requires the creation of a new one. In that scenario, users should duplicate the original purchase requisition prior to completing the steps below.

This process may also be used to connect a new purchase requisition to an existing quick quote. In this scenario, users will not be able to update item prices with the Update Prices button at the conclusion of the quick quote, and will need to manually update the prices on each item according to the winning proposal response.

For instructions on how to duplicate a purchase requisition, please refer to the following material in Opus.

Duplicate a Purchase

Create Solicitation

1. From the purchase requisition that you would like to connect to a quick quote, click **Create Solicitation**.

Create Solicitation



Creating and Awarding Quick Quotes in OhioBuys Updating a Purchase Requisition with an Existing Quick Quote

Add to an Existing Sourcing Project

2. Under the Add to an existing Sourcing Project header, click on the Sourcing Project field and search for the name or SRC number of the solicitation you would like to reference on the purchase requisition. When you find it, select it from the drop-down menu,

Add to an existin	ng Sourcing Project (i)
Sourcing Project	
	•

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	Go To Sourcing Project	
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Ada mg Sourcing Project()	Create a New Sourcing Project	
Sourcing Project	Sourcing Project Label*	
	Copy of 10/24 QQ Denio - Award	
	sourcing type	
	RFx Type	
Add / Select Suppliers to the Sourcing Project	RFx Grid	
Suppliers		
BREEN LAW FIRM LLC × O -	80121707 - Labor disputes law services × O -	
sap][Legal mentions]		Ohio v3.0 © Training - N

🔺 Note

After choosing the sourcing project, you will have the option to select a specific lot or round from the solicitation, and/or a specific item grid.

Lot / Round in progr	ess
	•
RFx Grid	
	•

RFx Type

3. Update the **RFx Type** field by selecting **Quick Quote** from the drop-down menu.

RFx Type*	
Quick Quote	O -



Creating and Awarding Quick Quotes in OhioBuys Updating a Purchase Requisition with an Existing Quick Quote

Go to Sourcing Project







Creating and Awarding Quick Quotes in OhioBuys Updating a Purchase Requisition with an Existing Quick Quote

Origin P.R.

6. Select the **hyperlink** to the new purchase requisition in the **Origin P.R.** column.

🔺 Note

If the solicitation has already been awarded, you should select it on the row that corresponds to the winning bid. Otherwise you can select it in any row.

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		CAREWORKS TECHNOLOGIES	Lot:1/ Round:1	Proposal # 1	Pending				[REQ000004816] Copy of 1 [REQ0000004755] 10/24 QQ	0000067707	
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Origin P.R.

[REQ000004816] Copy of 1... [REQ000004755] 10/24 QQ ... [REQ0000004816] Copy of 1... [REQ0000004755] 10/24 QQ ...

View the Link

7. The linked solicitation will now appear in the **Sourcing** column of the line item(s) on the new purchase requisition.





If you have questions or need additional assistance, please contact the OBM Contact Center via email (<u>OBM.ContactCenter@obm.ohio.gov</u>) or phone (877-644-6771).
A Note on Continuation Purchases

Guidance for Flagging Continuation Purchases

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If a purchase is a continuation of a previous purchase off of an STS contract, users must indicate this on the line item(s). Click **Yes** in the **Continuation?** Field on each line item that is part of a continuation purchase. This will allow you to enter any relevant comments in the Continuation Comments field.

If the previous purchase was made in OhioBuys, search for the PO number in the **Continuation Order** field and select it from the drop-down menu. Then click **Save**.

- Users should also attach any supporting documentation referencing the original solicitation and/or purchase in the **Attachments** section on the purchase requisition header.
- A continuation on a purchase originating from an STS contract where the initial solicitation and purchase were made outside of OhioBuys will not show up in the Continuation Order field. This will cause the new PR to show up on the STS exception report.
- Classifying a purchase as a continuation will not allow an agency to bypass the STS purchase requirement that requires the solicitation of multiple suppliers.

Additional Quick Quote Materials

Topics

- Purchasing from a Two-Phase Quote Contract
- Creating a Purchase Requisition when Awarding a Completed Quick Quote to a Supplier with a Punchout Catalog

OhioBuys Purchasing from a Two-Phase Quote Contract

Updated: 06/21/2024 05:17 PM

Version: 4.0

Purpose & Profiles

This job aid covers the process for soliciting pre-qualified Suppliers as part of a purchase from a Single Agency Contract Quote, Multi-Agency Contract Quote, or Enterprise Contract Quote contract.

Profiles: Requester, Requisitioner, Quick Quote Procurement User

Used When

Reference this when an agency would like to purchase from a Single Agency Contract Quote, Multi-Agency Contract Quote, or Enterprise Contract Quote contract in OhioBuys.

🔺 Note

A Two-Phased Quote Contract is a contract that was awarded to multiple (i.e., pre-qualified) suppliers offering the same goods/services in the same geographic region. These contracts will have a Contract Type of Competitive Selection – Two Phase and a Contract Sub-Type of Single Agency Contract Quote, Multi-Agency Contract Quote, or Enterprise Contract Quote. Each qualified Supplier will have their have own contract (e.g., CSP900922-1, CSP900922-2, CSP900922-3, etc.). These contracts will share an Index Number. When an agency has a need and would like to purchase from one of these contracts, they should only solicit the pre-qualified Suppliers on that contract. Only those Suppliers may submit a response to the solicitation and then a subsequent award can be made.

Shop: Browse Items

1. Log in to OhioBuys. From the Main Menu Navigation Bar, click Shop and then select Browse Items from the drop-down menu.





My Shopping Lists

Advanced Search

- 2. The Browse Items page is displayed. Click the Advanced Search
- (**T**) icon.

In the **Advanced Search** options, click the X icon to remove the item Tag filters. Then, enter and select the **Contract** for the Two-Phased Single Agency, Multi-Agency Contract Quote, or Enterprise Quote Contract you are trying to purchase from (e.g., RSI016359). To select the correct contract, you may need to click See All in the Contract field to search for and select the correct contract. Then, click **Search**.

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Select the Items

3. On the results page, choose your item(s) by selecting the checkbox(es) next to the item(s).

Once you have selected the checkbox(es), you can adjust the quantity by either manually inputting the quantity or clicking the + or - symbol next to the shopping cart.



Add Selection to Cart

4. Once you have selected your item(s) and adjusted quantities, click **Add selection to cart**.

Add selection to cart



Checkout

The specified item(s) have been added to your shopping cart.
 To begin the checkout process, click Checkout.

Checkout

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Save

- 6. The checkout page is displayed. After making any necessary updates, click **Save**.
- Update the Requisition Label using your agency's agreed upon naming convention. If your agency does not have a naming convention, use a brief description of the items and your initials (e.g. John Doe buys office supplies so the label is "Office Supplies JD").
- Select your Organization and Business Unit, which is the department or division of your agency that this requisition is for. This field may be pre-populated depending on your access.
- Select the requisition's Ship To and Bill To addresses.

lequisition: REQ0000106088 - Copy of Req	2/27/2023 (Draft)		Q. Search
B Save Su	mit for Approval	Keset Allocations	Create Solicitation	Other Actions +
Header				
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Organization ()*		Fiscal Year		
DPS511000 Grants Management EMAEOC	0-	2023 - State of Ohio		
Business Unit * DPSO1 - Dept of Public Safety	0 -	Budget Date*		Request Description

Create Solicitation

Create Solicitation

7. Click Create Solicitation.





Edit Sourcing Project

8. The associated line item information from the purchase requisition will be automatically carried over into the item grid of a new quick quote solicitation (Supplier, Item Description, UOM, Price Quantity). You can edit these details prior to releasing the quick quote solicitation for this page.

- Enter the **Sourcing Project Label**, which should be a short description of what the quick quote solicitation is for. Note that this will also be the title that Bidders/Suppliers see.
- Set the RFx Type to Quick Quote.
- Confirm and make any necessary updates to the **Commodities** and/or **Organizations** fields. These fields are pre-populated based on your purchase requisition.
- Enter today's date as the **Open Date**.



Go To Sourcing Project

9. Click Go To Sourcing Project.

Go To Sourcing Project





Save

Sourcing General Information

DAS101000 Administrative Support Divisn GSVC

72101510 - Plumbing system maintenance or repair 🛭 🗴

Solicitation ID SRC0000014673

Quick Quote

Contracting Entity

Commodities*

Project Start Date

Label*
Req. 11/28/2023
Project Type*

10. The quick quote solicitation has been created. From the Setup Project tab, confirm the displayed information and make updates as needed. Then, click **Save**.

Save as a template

Participating Organizations

Other Commodities

Θ-

Status

In progress

Θ-

Θ.

Save

Save

11. Navigate to the Setup Team tab.

On the **Setup Team** tab, you re able to add team members to your quick quote. This is particularly helpful if you would like someone to be able to take action on your quick quote while you are out of office. You should also add all of the relevant approvers for your associated purchase requisition as team members on the Setup Team tab so they have access to review your quick quote award details.

- Search for your team members using the Select User field. Assign them a profile of **Contributor (Sourcing Project)**.
- Note that only the user listed as **Responsible** for the project is able to release and reward the quick quote.





Select user(s) ()*

Θ-

Trash Can

12. Navigate to the **Add Suppliers** tab and click the **Trash Can** (

1) icon to remove the placeholder Supplier (e.g., DNR01, DAS01, etc.).





🔺 Note

To only invite bidders and/or suppliers with valid MBE status, slide the **MBE Set Aside** indicator on this tab. The system will then add the selected contract(s) with MBE suppliers.



MBE Set Aside

See All

13. Click the **Selector** (**•**) icon on the Other Contracts field and then click **See All**.

Other Contracts
MLA0031-1 - ZixCorp Systems Email Encryption SaaS Master License Agreement Amendment #4
DPS016331 - ZetX TRAX SUITE: Annual Renewal for ONIC
DPS016654 - ZetX renewal
CSP904519 - YOUTH RISK BEHAVIOR SURVEY/ YOUTH TOBACCO SURVEY Amendment #1
2023-315 - Youngstown CCD
CTR018125 - Yoga Instructor at Northcoast Behavioral Healthcare
MMA7481 - XTEK PARTNERS INC Renewal for SFY24-25
CRP30502 - Writing Utensils, Pens, Pencils, Highlighters and Imprinted Items Amendment #3
R\$902221 - WORKWEAR, OUTERWEAR, AND RAINWEAR GARMENTS Amendment #1
DPS016855 - Workshop on Comprehensive School Threat Assessment
See All



Enter Index or Contract Number in Keyword field

Keywords STS515

14. Enter the Index Number in the **Keyword** field (e.g., STS515). *,* applicable Suppliers' contracts are returned.

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	T	
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Search



Checkbox Icon

16. Click the **Checkbox** () icon next to the **Name** header to select all of the displayed Suppliers.

If there are multiple pages of search results, navigate to each page and click the **Checkbox** () icon next to the Name header on each page to ensure all Suppliers are selected.



Save

17. Click Save.





Prepare Solicitation

- This a A A A Jordan L 0 18. Navigate to the Prepare Solicitation tab. **1** n a 18 Add a Task **Prepare Solicitation** |-| Save & Close 🛛 🗎 Save Other A elected Lot - Ro Lot : 1 - Round : 1 - Copy of Reg. 2/27/2023 (Draft) Setup Item Confirm Invited Sup Do REx Setting Open and Closure Begin Date Solicitation Statu Workflow Statu Draft 3:14:59 PM RFx Type Quick Quot 0 Copy of Reg. 2/27/2023 Lot # 🛈 Round # ① uiry Begin Date Commodity Suppliers Fod Dat Enable for Public Posting Publication begin date Advanced Options in cumpliant to recoord to PEv i mn grid Suppliers can partially bid
 - Enter a Closing Date and time, which is the date and time responses are due from Bidders and/or Suppliers.
 - Set the Amendment field to No.
 - Indicate the **Inquiry Begin Date** and time, and **Inquiry End Date** and time, which is the period during which Suppliers can submit questions about the solicitation.
 - If the Inquiry Begin Date is not populated by the user, it will automatically match the solicitation posting date once the solicitation is open for bidding. However, users must always manually input the Inquiry End Date.
 - It is highly recommended to update the **Process** and **Summary** fields. These fields provide additional details regarding the basis for award (Process) and the purpose of the solicitation (Summary) and are visible to the public.
 - The Process field should be used to explain things like what the award will be based on (e.g., lowest responsive and responsible, best value, etc.) or other procedures that apply to the solicitation. If your solicitation requires a site visit before a bid can be submitted, detail the site visit process in this field.
 - The Summary field will automatically populate with the information contained in the Request Description field of the purchase requisition and can be edited as needed. It needs to include a clear description of the need, when the goods/services will be needed, the Ship To address, and the method of payment as appropriate.
 - Under Advanced Options, uncheck the Publicly Post Opportunity checkbox and set the Commodity Suppliers Notified selector to No.



Proceed to release the quick quote solicitation by following the steps in Release a Quick Quote Solicitation. After the Bid Closing Date for the quick quote solicitation has passed, please refer to Analyze and Award a Quick Quote Solicitation for details on how to analyze and award the quick quote solicitation. Once an award has been made, follow the steps on updating the original purchase requisition with the award details and be sure to select the awarded Supplier's contract on the Contract field of the line item details page for each awarded line item.

After completing the steps outlined in this document, please reference the following materials for additional instructions:

Release a Quick Quote Solicitation

Analyze and Award a Quick Quote Solicitation

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

Creating a Purchase Requisition when Awarding a Completed Quick Quote to a Supplier with a Punchout Catalog



Updated: 06/21/2024 05:33 PM

Version: 4.0

Purpose & Profiles

This job aid covers the process of creating and updating a purchase requisition with the results of a completed quick quote when the Supplier receiving the award provides these items in a different punchout catalog.

Profiles: Requisitioners, Quick Quote Procurement Users

┛ Used When

Reference this when you have completed a quick quote using items from a Supplier's hosted or punchout catalog in the original purchase requisition and need to award a Supplier who provides those same items in a different punchout catalog. (e.g., certain STS033 contracts.)

Shop: Browse Items

1. Log in to OhioBu	uys. Fron	n the Main Menu Nav	vigation bar, hover	<mark>Ohio</mark> Buy < ত ঐ	S Suppliers Sourcing Contracts Requester	Shoa Procurement Policise & Permit Analys Desvice Home Mry Shopping Lints	o Public Response Admin	_	_	[A fearch	- 0
over Shop and then s	select Br	owse Items from the	drop-down	? Need Holp Cetting Started!	Welcome! The selected content contains no text	1		0 Current FY POrs	(+150) Requisitions			
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Creating a Purchase Requisition when Awarding a Completed Quick Quote to a Supplier with a Punchout Catalog

2. To limit the displayed items to only include punchout catalogs, click the **More Filters** icon.

More Filters icon



Punchout Only Checkbox

3. Select the Checkbox icon to filter for Punchout only.

 None
 None

Checkbox icon

To filter and search for a punchout catalog from a specific supplier or contract, clear the item filters in the Tag drop-down list and enter the supplier or contract name in the field you would like to search.





Search

4. Click Search.





Creating a Purchase Requisition when Awarding a Completed Quick Quote to a Supplier with a Punchout Catalog

Shop Online

5. Once you have located the Supplier whose punchout catalog you would like to access, click the **Shop Online** icon.





Users can order items from the punchout catalog and will be returned to OhioBuys with the items from the Supplier's punchout catalog already added to your shopping cart. Supplier punchout catalogs are unique and what users see in each catalog will depend on which is selected.

Checkout



Checkout



Checkout



Creating a Purchase Requisition when Awarding a Completed Quick Quote to a Supplier with a Punchout Catalog

Open	the	Line	ltem
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Enter the Quote ID

10 Select the Supplier Ouote ID field and enter the sourcing		Item
project number.		Continuation?
	1.1	No

pplier Quote ID 🛈	
SRC1005	



Update the Remaining Line Items

11. Click **Save & Close** and continue to update the pricing for the remainder of the line items.

Save & Close

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Creating a Purchase Requisition when Awarding a Completed Quick Quote to a Supplier with a Punchout Catalog

Create a Quick Quote



Link to the Existing Quick Quote

13. In the **Add to an existing Sourcing Project**, select the name or SRC number of the solicitation you would like to reference on the purchase requisition from the drop-down menu.

Add to an existing Sourcing Project (i)				
Sourcing Project				
•				



Select the RFx Type

14. Enter the RFx Type field and select Quick Quote.

RFx Type*

I

1	
Cancellation	
Quick Quote	



Creating a Purchase Requisition when Awarding a Completed Quick Quote to a Supplier with a Punchout Catalog

Create a Quick Quote



Link a PR to a QQ

17. Click the **Origin PR** hyperlink for the purchase requisition to be linked to the solicitation.





Creating a Purchase Requisition when Awarding a Completed Quick Quote to a Supplier with a Punchout Catalog

Complete the Purchase Requisition

18. The line items for the purchase requisition will be linked to the quick quote from which the pricing was determined. Populate any remaining information on the purchase requisition.



🔺 Note

Sourcing

Awarding QQ Demo Awarding QQ Demo

Once the new purchase requisition has been successfully lined to the sourcing project, the original purchase requisition that was created can be canceled.

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