

Creating and Managing Contracts in OhioBuys

For agency users responsible for creating and managing contracts in OhioBuys.

Published: November 6, 2025



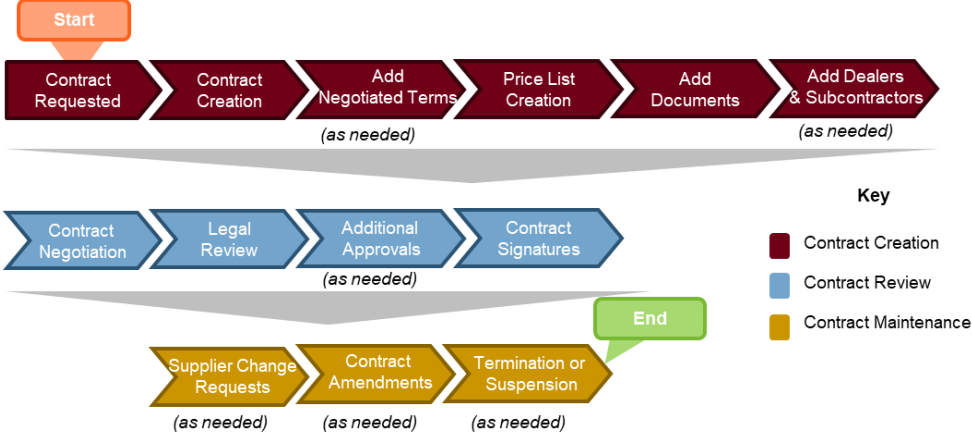
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Introduction

Overview:

The State of Ohio’s Department of Administrative Services (DAS) is responsible for the management of statewide Supplier contracts. Agencies can create and manage contracts that apply only to their agency. The process of creating, negotiating, signing, and maintaining contracts happens within OhioBuys and is complete once a contract is signed by the State and the Suppliers.



Processes Covered:

- Contract Creation:** When a recommendation for award is made after a solicitation or when the need arises, a contract record should be created. This contract record contains important details related to the contract such as the Supplier’s information, the start date of the contract, and the expiration date.
- Contract Review:** During negotiations, the contract can be authored directly within OhioBuys or edited offline then uploaded into the system. Contract teams allow users to manage security for each contract individually. Teams also pull in necessary subject matter experts to review and approve. The contract workflow routes each contract to the approvers that have been selected.
- Contract Maintenance:** Different activities related to maintaining the contract record throughout its lifecycle can be conducted directly within OhioBuys. Users can terminate, suspend, and amend a contract if the need arises.

Creating a Contract Record

Topics

- Create a Contract Without an OhioBuys Solicitation
- Create a Contract from a Solicitation



OhioBuys Creating a Contract Without an OhioBuys Solicitation

Updated: 09/16/2025 06:50 PM

Version: 19.0

1 Purpose & Profiles

This job aid covers this section walks through the process of creating a contract record within OhioBuys that is not linked to a solicitation.

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

Used When

Reference this when a contract record needs to be created.

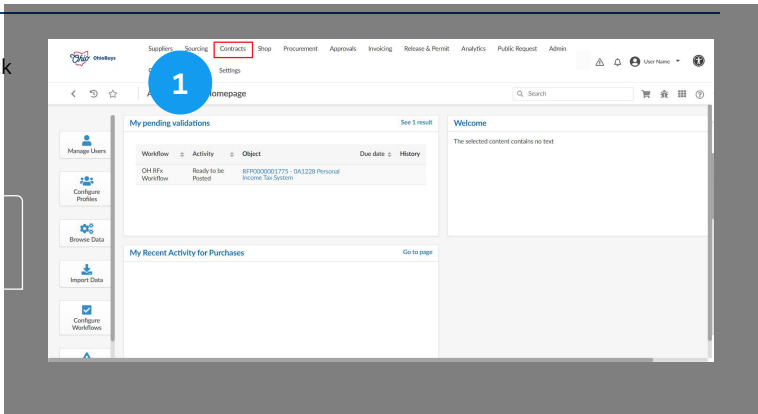
▲ Note

Contracts can be created from a solicitation or as a stand-alone record. Users cannot retroactively link a solicitation to a contract. For instructions on how to create a contract from a solicitation or “flip a solicitation”, refer to the Create a Contract from a Solicitation asset.

Click Contracts

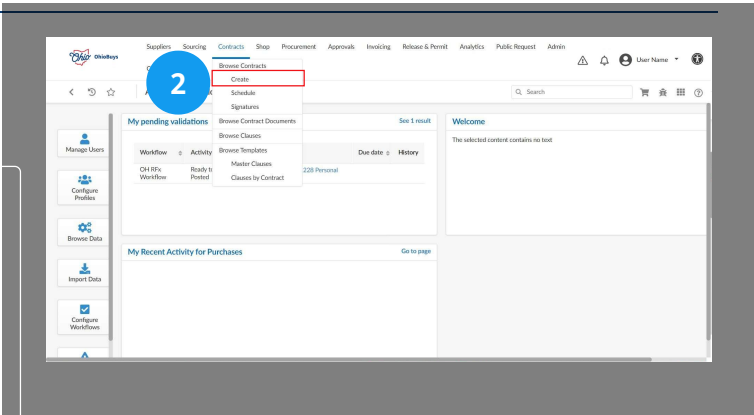
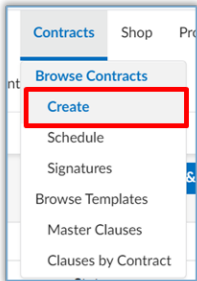
1. Log in to OhioBuys. From the Main Menu Navigation Bar, click **Contracts**.

Contracts



Click Create

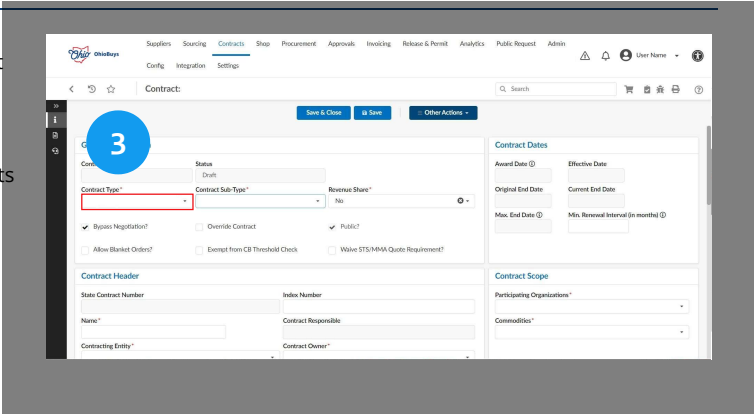
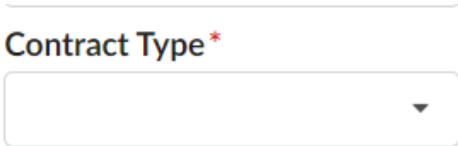
2. Click **Create** from the drop-down menu.



Select Contract Type

3. Select a **Contract Type**, which indicates the type of agreement this will be.

Refer to the table at the end of the Enduser portion of this training for more information on the varying types of contracts and who can create them.



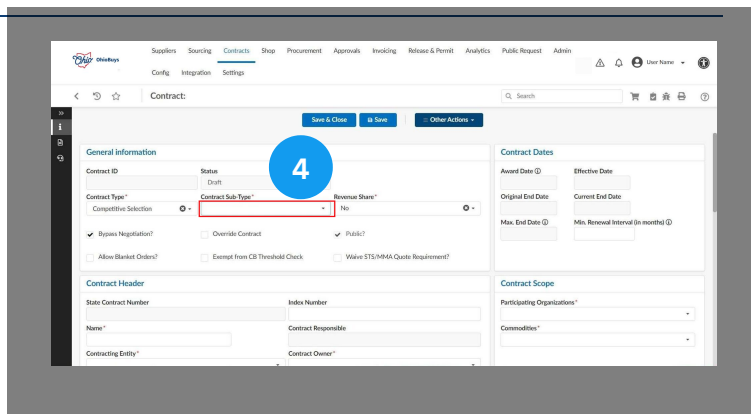
▲ **Note**

Please consult the table of **Contract Types** at the end of this section for an overview of the varying types and who can create each type of contract.

Select Contract Sub-Type

4. Selecting a **Contract Sub-Type** field (e.g., Statewide Contract, Master Services Agreement) based on the executed contract.

Contract Sub-Type*



▲ Note

Please consult the table of **Contract Sub-Types** at the end of this section for an overview of the varying types and who can create each type of contract.

▲ Note

- The **Bypass Negotiation** checkbox is engaged by default. If you intend to engage in Supplier redlining and negotiations through OhioBuys, you may uncheck it.
- Procurement Managers can engage the **Waive STS/MMA Quote Requirement** checkbox if there is only one Supplier that the goods/and or services can be purchased from.

▲ Note

- When selecting Competitive Selection, Competitive Selection – Two Phase, Waiver of Competitive Selection, or Requisite Program a mandatory **Revenue Share** field will appear.
- If the Contract Type = 'Waiver of Competitive Selection' and the Contract Sub-Type = 'Master Cloud Services Agreement', 'Master License Agreement', or 'Master Services Agreement', a Contract Analyst or Procurement Manger can select optional **Requires RTP**, **Requires Quotes**, or **Requires Quote or Justification Document** checkboxes.

Requires RTP
 Requires Quotes
 Requires Quote or Justification Document

- Checking the **Requires RTP** box will require all associated requisitions that reference the contract to include an approved RTP record in the **Request to Purchase** field of the item's **More Item Information** section.
- Checking the **Requires Quotes** box will require all requisitions over \$5000 that reference the contract to include a reference an awarded solicitation that included at least 2 suppliers in the **Sourcing** field of the line item.
- Checking the **Requires Quote or Justification Document** box will require all requisitions that reference the contract to include a reference to an awarded solicitation in the **Sourcing** field of the line item or to include a justification document.
- If the Contract Owner = 'OIT' and the Contract Type = 'Competitive Selection – Two Phase' and the Contract Sub-Type = 'Statewide Contract quote', 'Multi-Agency Contract Quote', or 'Single Agency Contract Quote', an optional **SIA Review Required** checkbox will appear.

SIA Review Required ⓘ

Checking this box will route any quick quotes associated with the contract to IT review.

- If the Contract Owner = 'OIT' and the Contract Type = 'Waiver of Competitive Selection' and the Contract Sub-Type = 'Master Maintenance Agreement', or any State Term Schedule, an optional **SIA Review Required** checkbox will appear.

SIA Review Required ⓘ

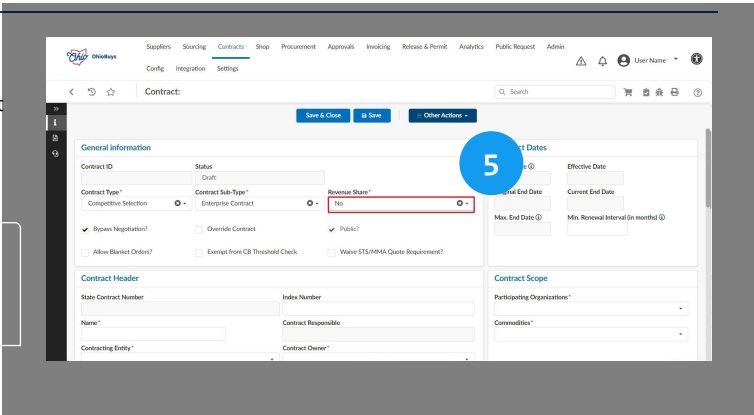
Checking this box will route any quick quotes associated with the contract to IT review.

Populate the General Information Section

5. Indicate whether or not **Revenue Share** will apply to this contract. Note that this field will only be visible on certain contract sub-types.

Revenue Share*

No

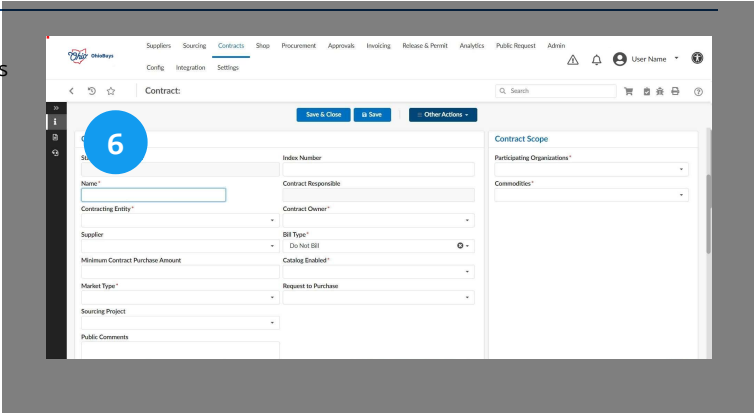


▲ Note

If the contract is an override contract, click the **Override Contract** checkbox. Vouchers that are associated with override contracts are linked to the original contract the override was created for and this contract can be selected in the Contract being Overridden field.

Complete Contract Header Information

6. In the Contract **Header** section, populate the mandatory fields

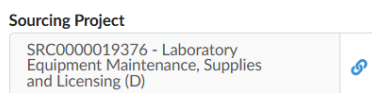


Contract Header Fields

Contract Header

State Contract Number	Index Number
<input type="text"/>	<input type="text"/>
Name*	Contract Responsible
<input type="text"/>	<input type="text"/>
Contracting Entity*	Contract Owner*
<input type="text"/>	<input type="text"/>
Supplier	Bill Type*
<input type="text"/>	Do Not Bill
Minimum Contract Purchase Amount	Catalog Enabled*
<input type="text"/>	<input type="text"/>
Market Type*	Request to Purchase
<input type="text"/>	<input type="text"/>
Sourcing Project	
<input type="text"/>	
Public Comments	
<input type="text"/>	

- a. **State Contract Number:** The contract number that is assigned by the State. For contracts that interface to OAKS, this is the number that will be sent to OAKS and associated with this contract record. Note that this field will automatically populate with the Contract ID generated by OhioBuys (e.g., CTR002226), but can be modified as needed after saving.
 1. Agency users will be prevented from listing an OPS contract as the master contract when creating an agency administered contract. The ability to number a contract using an existing State Contract Number will also not be allowed.
 2. To avoid integration issues with OAKS, users can no longer enter lowercase alphabetic characters in the State Contract ID field.
- b. **Name:** This will be the contract name. (Only the following special characters are allowed in the Contract Name field: !#\$%&(),;:/\'+*@-.)
- c. **Contracting Entity:** The contracting entity should reflect the agency or group responsible for initiating the contract. For example, contracts issued by the DAS office of Procurement Services should contain "DAS-Administrative Services" as the Contracting Entity.
- d. **Market Type:** This field indicates the type of Suppliers that are on the contract. (e.g. MBE, EDGE, CRP).
- e. **Sourcing Project:** Contracts that are created from an OhioBuys solicitation will have a linked solicitation record (e.g., SRC0000019376 - Laboratory Equipment Maintenance, Supplies, and Licensing).
 - 1.

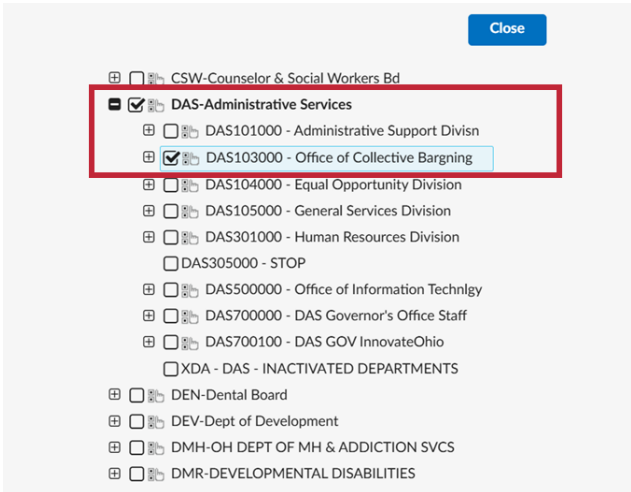
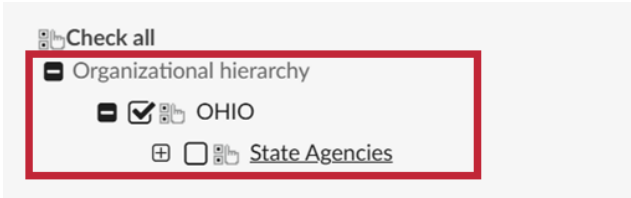
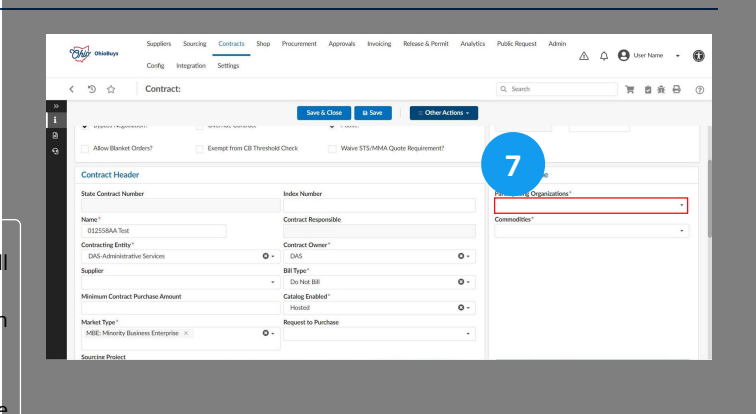


- f. **Contract Owner:** Agency Competitive Selection (ACS) contracts that involve IT and non-IT components should be set up as Contract Owner = NIT. For Non-ACS purchases combining IT and Non-IT components, the agency-administered contract should be set up without the IT flag checked. In these cases, any necessary IT R&Ps should be obtained via the requisition workflow. ACS contracts established by the Ohio Facilities Construction Commission should have business unit = 'SFC01' and contract owner = 'CNS'.
- g. **Bill Type:** Designates who should be billed to pay for costs associated with administering the contract. (e.g., the agencies using the contract, the supplier holding the contract, both, neither, etc.)
- h. **Catalog Enabled:** Indicates what type of catalog is setup for this contract. (e.g. hosted or punchout).

Select Participating Organizations

7. In the Contract Scope box, choose the mandatory **Participating Organizations**. This field determines which agencies and/or divisions can order from the contract.

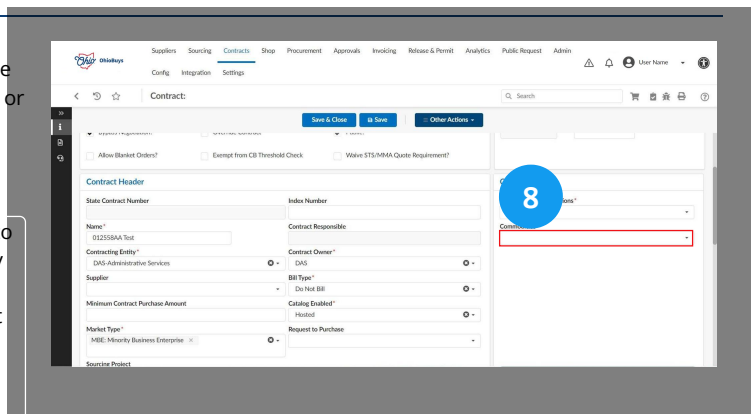
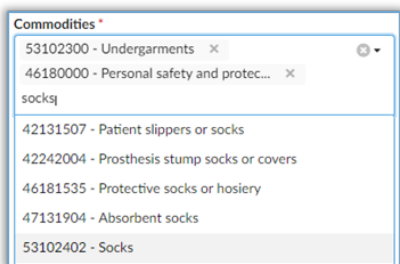
1. To most effectively choose the Organization, click the Selector (▾) icon and then select See All. A pop up will appear with the organizational hierarchy.
2. Under Organizational Hierarchy, click the Expand (⊕) icon next to OHIO. If you are creating an agency contract, click the Expand (⊕) icon next to State Agencies.
3. Click the Hand (🖱️) icon to select all values beneath the listed organization or click the Checkbox () icon next to each organization to select an individual or a few organizations.
4. Click the X (✕) icon once you have selected your organizations to move on.



Select Commodities


8. In the **Commodities** field, indicate the commodities tied to the contract based on the scope of the contract by typing in the code or description of the code(s) you would like to add.

1. To select the Commodities, type the code or description into the **Commodities** field and select the applicable commodity from the results displayed beneath the field.
2. If you are selecting more than one commodity code, repeat step 1.



▲ Note

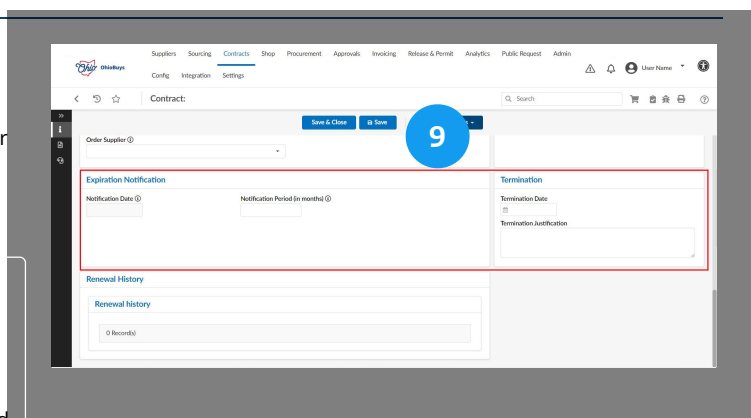
If you are having trouble finding the correct commodity in OhioBuys, you can also visit the UNSPSC website (<https://www.unspsc.org/search-code>) to search for a commodity.

You can also follow the same steps used to complete the Organizations field to complete the Commodities field. However, when browsing the commodities list, either click the **Hand** () icon to select all values beneath the listed commodity or click the **Checkbox** () icon next to each commodity to select an individual or a few commodities.

Complete the Expiration dates

9. The **Notification Date** field is automatically populated by subtracting the specified number of months in the Notification Period in Months field from the Current End Date (if populated) or Original End Date field.

The **Expiration Notification** section contains information about when an expiration notification will notify the contract team to review the contract for potential renewal, which usually requires an amendment. Users can enter a digit into the **Notification Period** field to represent the number of months before the **Current End Date** (and if the **Current End Date** isn't populated, then before the **Original End Date**), that an e-mail notification will be sent.

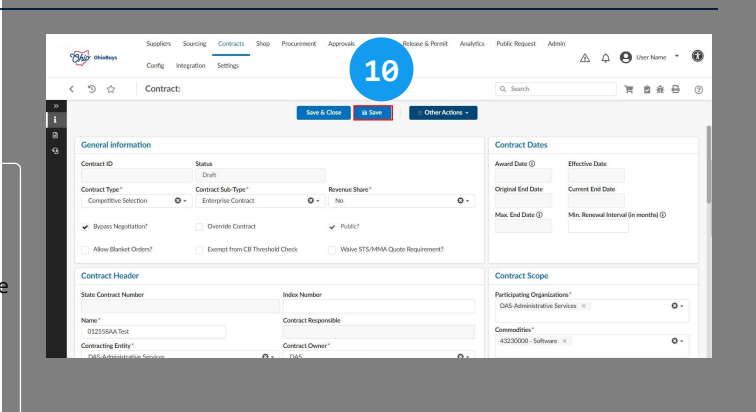


Click Save

10. Click the **Save** button.

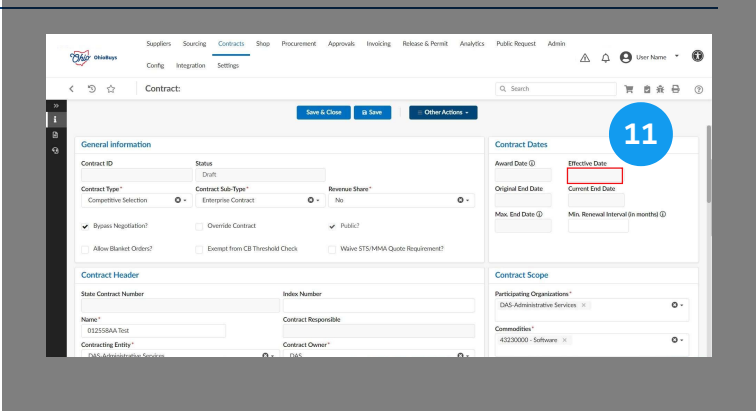
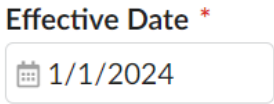


Once you click **Save**, the following tabs on the left side of the page become visible: Overview, Contract tree view, Contacts, Documents, Price List, Orders, Workflow, Evaluation, Dealers, Subcontractors, Supplier Change Request, Exceptions, Usage Report, Payment, and Confidential Documents.



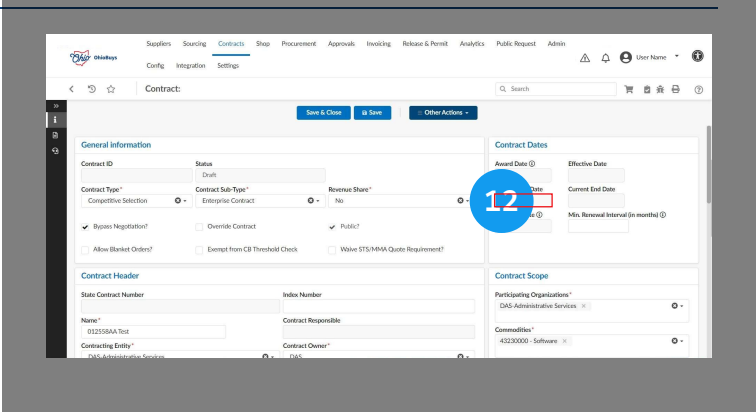
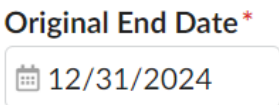
Complete Contract Dates

11. Enter the **Effective Date** which indicates the contract start date.



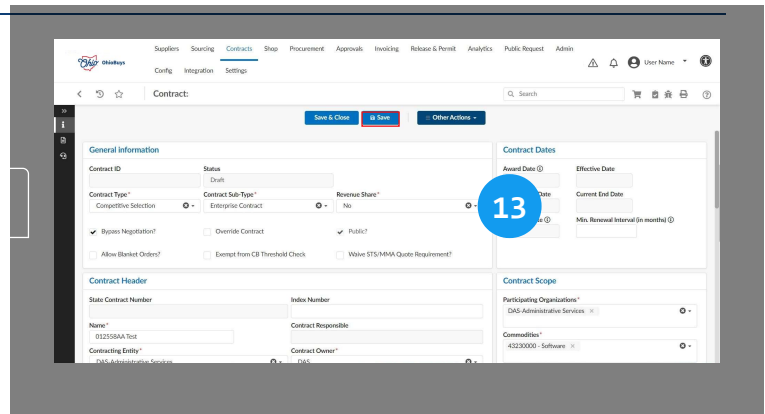
Complete Contract Dates

12. Enter the **Original End Date** field with the original or initial contract end date.



Complete Contract Dates

13. Click the **Save** button.



Contract Types and Sub-Types

Contract Type	Contract Sub-Type	Who Can Create This Contract Type?
Competitive Selection	a. Statewide Contract b. Multi-Agency Contract c. Single Agency Contract d. Printing	<ul style="list-style-type: none"> • DAS Office of Procurement Services • DAS Office of State Printing and Mail Services • Department of Transportation
Competitive Selection - Two Phase	a. Statewide Contract Pre-Quals b. Multi-Agency Contract Pre-Quals c. Single Agency Contract Pre-Quals d. Statewide Contract Quote e. Multi-Agency Contract Quote f. Single Agency Contract Quote g. DOT Multiple Awards	<ul style="list-style-type: none"> • DAS Office of Procurement Services • Department of Transportation
Waiver of Competitive Selection	a. Master Cloud Services Agreement b. Master License Agreement c. Master Maintenance Agreement d. Master Services Agreement e. State Term Schedule S&LG, GSA, DOD, or VA	<ul style="list-style-type: none"> • DAS Office of Procurement Services (for all contract sub-types except for Commercial Lease Agreements)
Agency Administered	a. Personal Services Agreement b. General Services Agreement c. General goods Agreement d. Professional Services Agreement e. Grant Agreement f. Memorandum of Understanding	<ul style="list-style-type: none"> • All State Agencies (excluding DAS Office of Procurement Services)
Requisite Program	1. DRC - Ohio Penal Industries (OPI) 2. DAS - Community Rehabilitation Program (CRP) 3. OOD - Business Enterprise Program 4. DAS - Office of Information Technology (OIT) 5. DAS - State Printing and Mail Services 6. DMH - Ohio Pharmacy Services 7. Ohio Facilities Construction Commission (OFCC) 8. OFCC Local Agency Administered Agreement	<ul style="list-style-type: none"> • Applicable Requisite Program (i.e. OPI, CRP, OOD-Business Enterprise Program, OIT, DAS-State Printing and Mail Services, DMH-Ohio Pharmacy Services, OFCC)
Comparison	a. Comparison	<ul style="list-style-type: none"> • The purpose of this is to allow DAS to input items offered on punchout catalogs so price audits can be conducted to ensure pricing offered on punchout catalogs is consistent with contracted price.
Real Estate	a. Commercial Lease Agreement	<ul style="list-style-type: none"> • Real Estate Analysts
Direct Purchase	a. Direct Purchase	<ul style="list-style-type: none"> • Catalog Analysts

Creating and Managing Contracts Creating a Contract Without an OhioBuys Solicitation

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys Creating a Contract from a Solicitation

Updated: 11/03/2025 06:14 PM

Version: 17.0

📌 Purpose & Profiles

This job aid covers the process of creating a contract record within OhioBuys from an existing solicitation.

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

📄 Used When

Reference this when a solicitation award has been made and a contract linked to the solicitation needs to be created.

▲ Note

Contracts can be created from a solicitation or as a stand-alone record. For instructions on how to create a stand-alone contract, please refer to the training materials linked below.

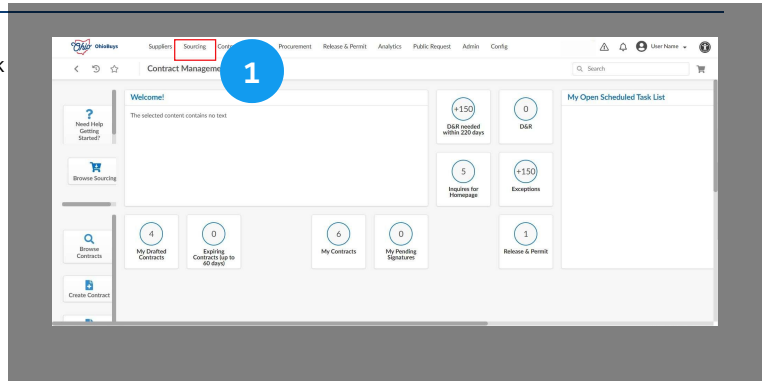
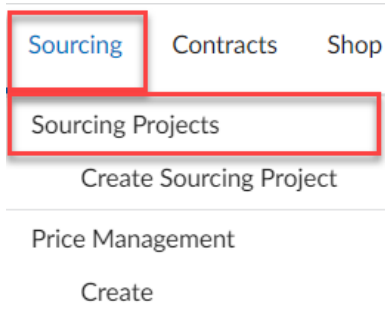
Reference the Following Document(s):

[Creating a Contract Without an OhioBuys Solicitation](#)

▲ Note: For users creating a multi-award scenario that includes 10 or more Bidders and/or Suppliers, please create a Helpdesk ticket including the SRC number associated with the sourcing project. The OhioBuys team will provide guidance on how to mass upload contract records for each of the awarded Suppliers.

Navigate to Sourcing Projects

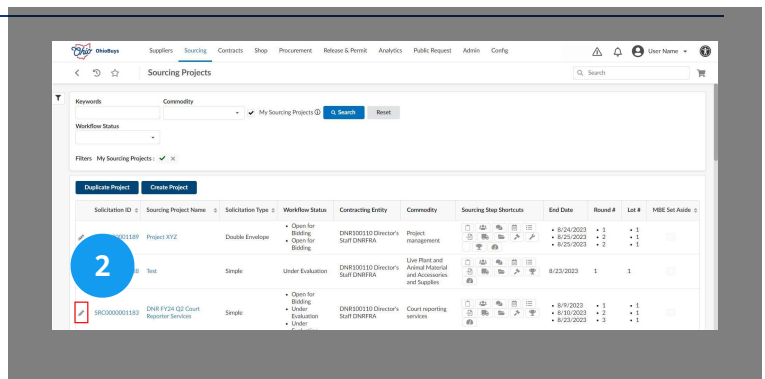
1. Log into OhioBuys. From the Main Menu Navigation bar, click **Sourcing** and then select **Sourcing Projects** from the drop-down menu.



Open Solicitation

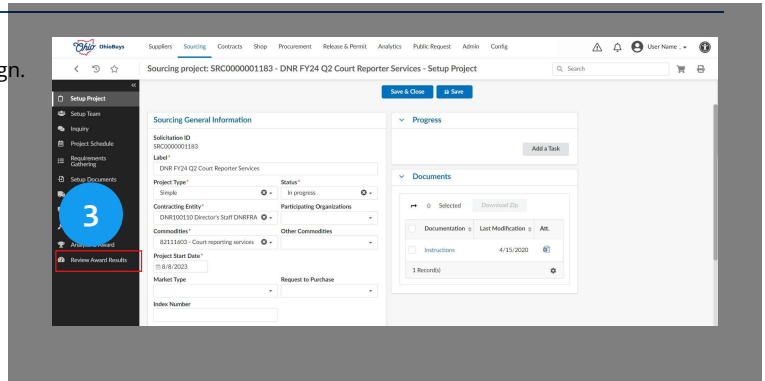
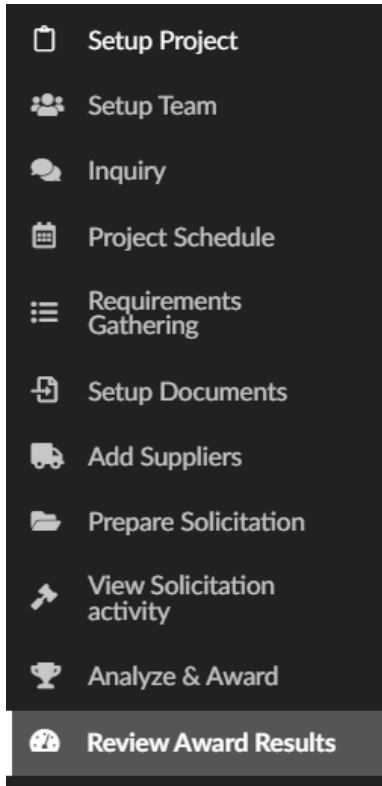
2. Search for the solicitation you would like to open using the Keywords Search, or the available filters. When you have located the project you want to award, click the **Pencil** icon.

Pencil icon: 



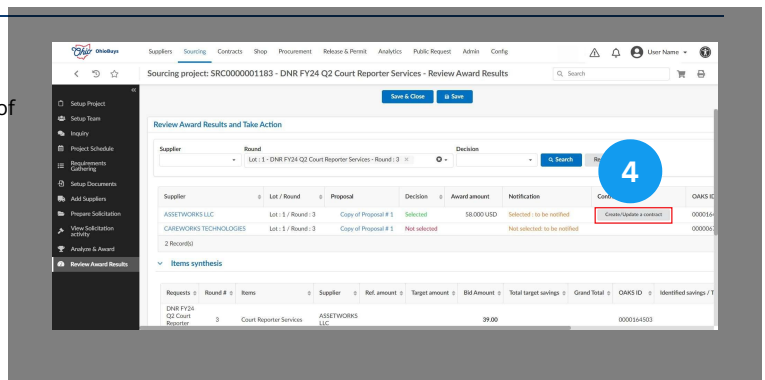
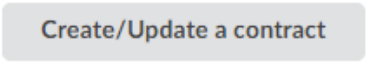
Review Award Results

3. Navigate to the **Review Award Results** tab on the left-hand sign.



Create/Update a Contract

4. Click the **Create/Update a contract** button. This button is located on the Review Award Results tab in the Contract column of the Take Actions section.



New or Existing Contract

5. The default option is to create a new contract. If you are updating an existing agreement, select the radio button for **Existing Contract** and then select the contract that requires updating.

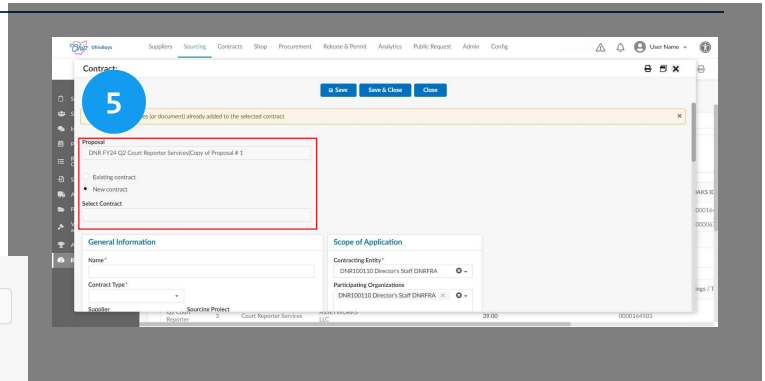
Proposal

DNR FY24 Q2 Court Reporter Services(Copy of Proposal # 1)

Existing contract

New contract

Select Contract



General Information

In the General Information section, populate the mandatory fields:

General Information

Name*

Contract Type*

Supplier: ASSETWORKS LLC

Sourcing Project: SRC000019376 - Laboratory

Status: Draft

State Contract Number

Amendment #

- a. **Name:** The name of the agreement (Only the following special characters are allowed in the Name field: !#\$%&(),;:/\'+*@-.)
- b. **Contract Type:** Indicates the type of agreement

▲ Note

Please consult the table of Contract Types and Contract Sub-Types at the end of this document for an overview of the varying types and who can create each type of contract

Scope of Application

In the **Scope of Application** section, populate the **Contracting Entity**. The contracting entity should reflect the agency or group responsible for initiating the contract. (For example, contracts issued by the DAS Office of Procurement Services should contain "DAS-Administrative Services" as the Contracting Entity)

The screenshot shows the 'Scope of Application' form with the following details:

- Contracting Entity:** DNR-Dept of Natural Resources
- Participating Organizations:** DNR100110 Director's Staff DNRFRA, DNR100000 - DNR-Department Administration, DNR-Dept of Natural Resources
- Primary Commodity:** 82111603 - Court reporting services
- Commodities:** (Empty field)

The organizations and commodities will default from the solicitation into the Scope of Application section.

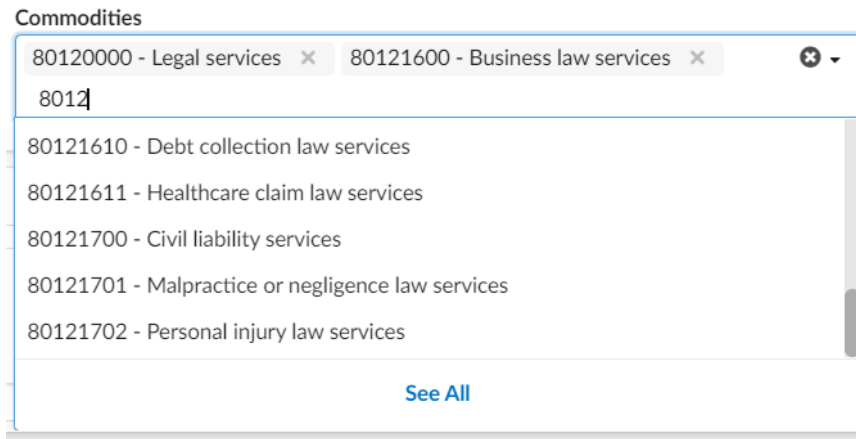
Select Organizations

The 'Select Organizations' pop-up window includes the following elements:


- Close** button (top right)
- Keywords** search bar with **Search** and **Reset** buttons
- 3 value(s) selected
- Uncheck all** button
- Organizational hierarchy** section with expand/collapse icons and checkboxes:
 - OHIO
 - State Agencies
 - DNR-Dept of Natural Resources
 - DNR100000 - DNR-Department Administration

a. **Participating Organizations:** Select the organization that the contract is for, which determines the agencies and/or divisions that can order from the contract.

1. To most effectively choose the Organization, click the **Selector** (▾) icon and then select **See All**. A pop up (pictured above) will appear with the organizational hierarchy.
2. Under Organizational Hierarchy, click the **Expand** (⊕) icon next to OHIO. If you are creating an agency contract, click the **Expand** (⊕) icon next to State Agencies.
3. Select the **Checkbox** () icon next to OHIO for a state-wide contract. For agency contracts, select the **Checkbox** () icon next to the agency name.
4. Click the **X** (✕) icon once you have selected your organizations to move on.

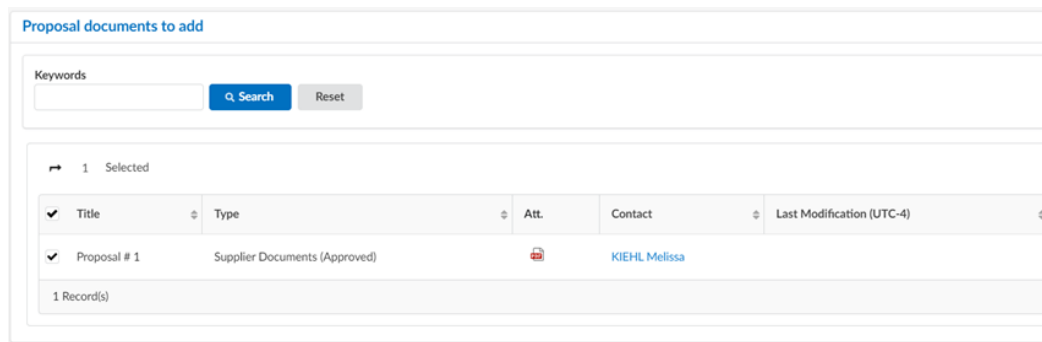


b. **Commodities:** Indicate the commodities tied to the contract based on the scope of the contract. To select commodities, type the code or description into the Commodities field and select the applicable commodity from the results displayed beneath the field. Repeat this process to add additional commodities.

- If you are having trouble finding the correct commodity in OhioBuys, you can also visit the UNSPSC website (<https://www.unspsc.org/search-code>) to search for a commodity.
- You can also follow the same steps used to complete the Organizations field to complete the Commodities field. However, when browsing the commodities list, either click the **Hand** () icon to select all values beneath the listed commodity or click the **Checkbox** () icon next to each commodity to select an individual or a few commodities.
- All items flipped from a solicitation will need to have commodities codes added on the Price List.

Adding Solicitation Documents

If there are any documents that were created for the solicitation, they can be carried over into the contract. Users should click the **Checkbox** () icon next to solicitation documents that should be included on the contract record.



▲ Note

For DOT solicitations that leveraged an Excel-based price sheet rather than using an OhioBuys solicitation grid, users should have compiled the Supplier response into a bid tabulation Excel and uploaded it to the Setup Documents tab of the solicitation as a Public Evaluation Document. This document should be attached to any contract created from that response.

▲ Note

If the early contract authoring feature has been utilized, the Supplier's document will appear within the Proposal documents to add section. When using early contract authoring, contract documents can be created in the Solicitations module using Native or MS Word Authoring. The Supplier will then be able to download the document, add comments and/or edits and attach a copy of the file as an attachment when submitting the proposal. Comments and edits submitted by the Supplier will be visible on the document when it is imported into the contract record.

Team Members to Add

The contract's team members will default with the team members from the solicitation. To remove team members uncheck the box next to the user's name.

Team members to add					
<input checked="" type="checkbox"/>	Sender	Contact	Email	Profiles at start on Sourcing Projects	Profiles on arrival at Contracts
<input checked="" type="checkbox"/>	BRADLEY Arianna	ariannabradley@kpmg.com	ariannabradley@kpmg.com	Responsible (Sourcing Project)	Responsible (Contract) X

To change or add a role to a user, select a value in the **Profiles on arrival at Contracts** column.

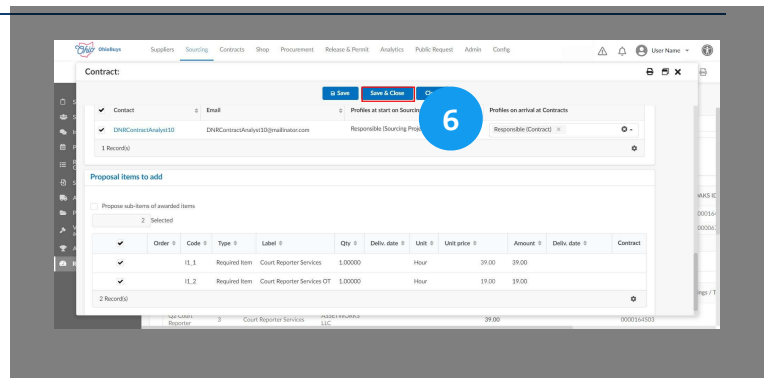
Proposal Items to Add

If needed, users can de-select the items that should not be in the price list of this contract. An example of when this would be used is if the contract will not have a price list or if certain items should only be accessible to certain organizations and, therefore, be separated into multiple contracts originating from one solicitation.

Proposal items to add											
<input type="checkbox"/> Propose sub-items of awarded items											
<input checked="" type="checkbox"/>	Order	Code	Type	Label	Qty	Deliv. date	Unit	Unit price	Amount	Deliv. date	Contract
<input checked="" type="checkbox"/>	I1_1		Required Item	Couch	20.00000	9/30/2020	Each	180.00	3,600.00		
1 Result(s)											

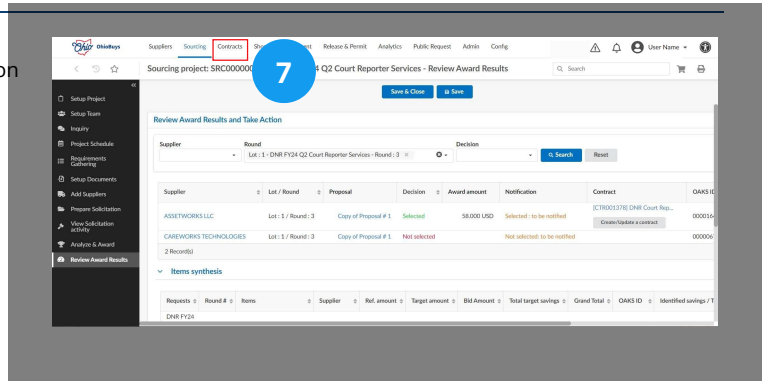
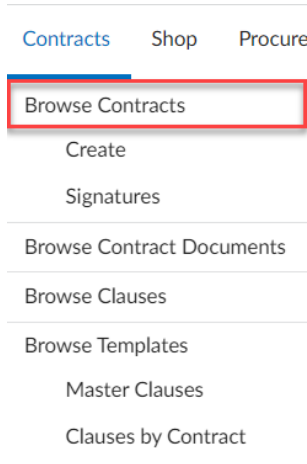
Save & Close

6. After reviewing all of the information to be carried into the contract, click **Save & Close**.



Browse Contracts

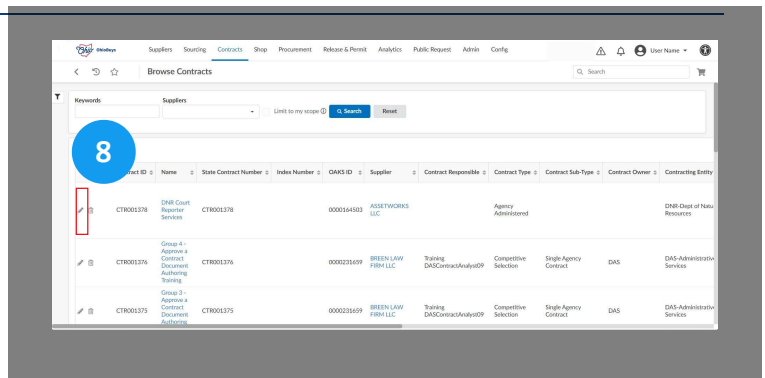
7. Navigate to the **Contracts** header in the Main Menu Navigation Bar and select **Browse Contracts** from the drop-down menu.



Open Contract

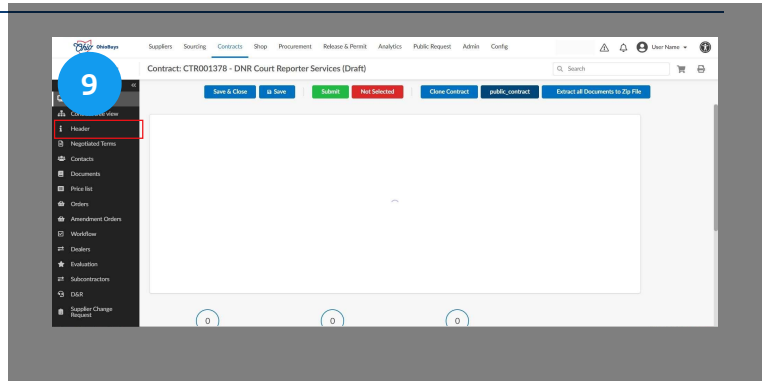
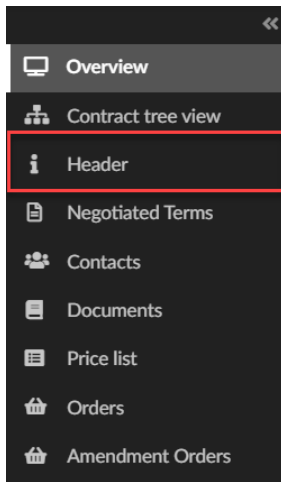
8. Click the **Pencil** icon next to the contract you just created to open it.

Pencil icon: 



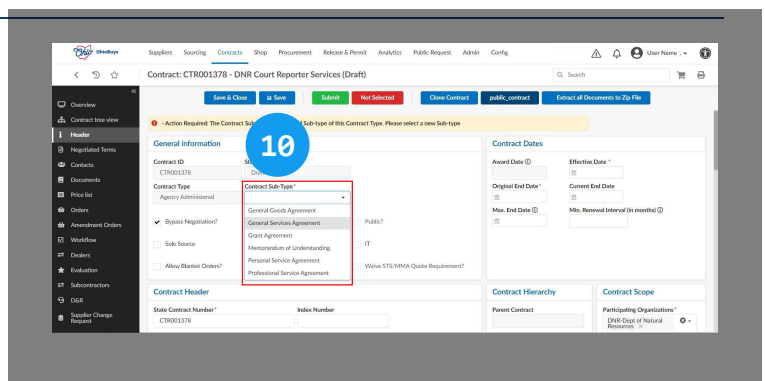
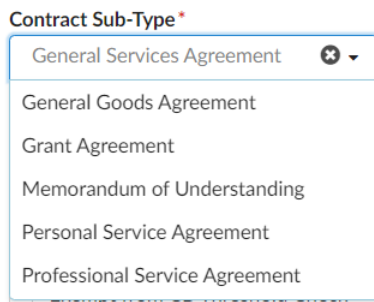
Header Tab

9. Navigate to the **Header** tab.



General Information

10. Select a **Contract Sub-Type** from the drop-down menu.



▲ Note

Please consult the table of Contract Types and Contract Sub-Types at the end of this document for an overview of the varying types and who can create each type of contract.

▲ Note

- If the Contract Type is Competitive Selection, Competitive Selection – Two Phase, Waiver of Competitive Selection, or Requisite Program then the mandatory **Revenue Share** field will appear.

The screenshot shows a 'General information' form with the following fields:

- Contract ID: CTR001378
- Status: Draft
- Contract Type: Agency Administered
- Contract Sub-Type: General Services Agreement
- Bypass Negotiation? (highlighted with a red box)
- Override Contract
- Public?
- Sole Source
- Single Source
- IT
- Allow Blanket Orders?
- Exempt from CB Threshold Check
- Waive STS/MMA Quote Requirement? (highlighted with a red box)

- By default, the **Bypass Negotiations** checkbox will be engaged. If you intend to engage in negotiations involving redlining with the Supplier, you may disengage this checkbox.
- Procurement Managers can engage the **Waive STS/MMA Quote Requirement** checkbox if there is only one Supplier that the goods/and or services can be purchased from.

Agency Competitive Selection

- The **Agency Competitive Selection** checkbox can be used to signify that an agency-administered contract meets competitive selection requirements, and contracts with this box checked will interface to OAKS and allow POs referencing them to be exempt from Direct Purchase Authority and Controlling Board thresholds.
 - The **Contract Not to Exceed** field on the Payment and Negotiated Terms tab is required for all Agency Competitive Selection contracts.
 - Agency Competitive Selection contracts **cannot** be longer than two years in duration, unless the contract is being established by the Ohio Facilities Construction Commission, business unit = 'SFC01', and contract owner = 'CNS'.
- If the Contract Type = 'Waiver of Competitive Selection' and the Contract Sub-Type = 'Master Cloud Services Agreement', 'Master License Agreement', or 'Master Services Agreement', a Contract Analyst or Procurement Manger can select optional **Requires RTP**, **Requires Quotes**, or **Requires Quote or Justification Document** checkboxes.

The image shows three checkboxes in a row:

- Requires RTP
- Requires Quotes
- Requires Quote or Justification Document

- Checking the **Requires RTP** box will require all associated requisitions that reference the contract to include an approved RTP record in the **Request to Purchase** field of the item's **More Item Information** section.
- Checking the **Requires Quotes** box will require all requisitions over \$5000 that reference the contract to include a reference an awarded solicitation that included at least 2 suppliers in the **Sourcing** field of the line item.
- Checking the **Requires Quote or Justification Document** box will require all requisitions that reference the contract to include a reference to an awarded solicitation in the **Sourcing** field of the line item or to include a justification document.
- If the Contract Owner = 'OIT' and the Contract Type = 'Competitive Selection – Two Phase' and the Contract Sub-Type = 'Statewide Contract quote', 'Multi-Agency Contract Quote', or 'Single Agency Contract Quote', an optional **SIA Review Required** checkbox will appear.

SIA Review Required ⓘ

Checking this box will route any quick quotes associated with the contract to IT review.

- If the Contract Owner = 'OIT' and the Contract Type = 'Waiver of Competitive Selection' and the Contract Sub-Type = 'Master Maintenance Agreement', or any State Term Schedule, an optional **SIA Review Required** checkbox will appear.

SIA Review Required ⓘ

Checking this box will route any quick quotes associated with the contract to IT review.

- Back-dating is allowed on an Agency Administered contract where the Agency Competitive Selection checkbox is **not** selected.

Additional Contract Header Fields

Contract Header

State Contract Number	Index Number
<input type="text"/>	<input type="text"/>
Name *	Contract Responsible
<input type="text"/>	<input type="text"/>
Contracting Entity *	Contract Owner ⓘ *
<input type="text"/>	<input type="text"/>
Supplier	Bill Type *
<input type="text"/>	<input type="text"/>
Minimum Contract Purchase Amount	Catalog Enabled *
<input type="text"/>	<input type="text"/>
Market Type *	Request to Purchase
<input type="text"/>	<input type="text"/>
Sourcing Project	Release and Permit
<input type="text"/>	<input type="text"/>
Public Comments	Contract Group
<input type="text"/>	<input type="text"/>
<input type="radio"/> Pre Governance Contract <input type="radio"/> On Hold <input type="radio"/> Staff Aug Contract	Internal Contract Notes
	<input type="text"/>
Order Supplier ⓘ	
<input type="text"/>	

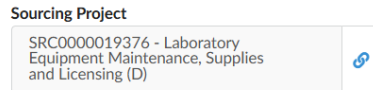
In the Contract Header section, populate the remaining mandatory fields:

- **State Contract Number:** The contract number that is assigned by the State. For contracts that interface to OAKS, this is the number that will be sent to OAKS and associated with this contract record. Note that this field will automatically populate with the Contract ID generated by OhioBuys (e.g., CTR002226), but can be modified as needed after saving. Agency users will be prevented from listing a DAS Office of Procurement Services (OPS) contract as the master contract when creating an agency administered contract. The ability to number a contract using an existing State Contract Number will also not be allowed (although contract amendments can continue to re-use the same State Contract Number). To avoid integration issues with OAKS, users can no longer enter lowercase alphabetic characters in the State Contract ID field.
- **Name:** This will be the contract name. Only the following special characters are allowed in the Contract Name field: !#\$%&(),;:/'+*@-.
- **Contract Owner:** OIT contracts will affect the direction of the purchase requisition workflow for IT commodities.
 - Agency Competitive Selection contracts must list either 'AIT' (i.e., Agency IT Contract) or 'NIT' (i.e., Agency Non-IT Contract). ACS contracts established by the Ohio Facilities Construction Commission should have business unit = 'SFC01' and contract owner = 'CNS'
- **Bill Type:** Designates who should be billed to pay for costs associated with administering the contract. (e.g., the agencies using the contract, the supplier holding the contract, both, neither, etc.) - note that this field is not required for all contract types and sub-types.
- **Catalog Enabled:** Indicates what type of catalog is setup for this contract (e.g. hosted or punchout).
- **Market Type:** This field indicates the type of Suppliers that are on the contract. (e.g. MBE, EDGE, CRP)

Additionally, the following non-mandatory fields can be populated in the Contract Header. These fields are listed in order from top-to-bottom going left-to-right across rows:

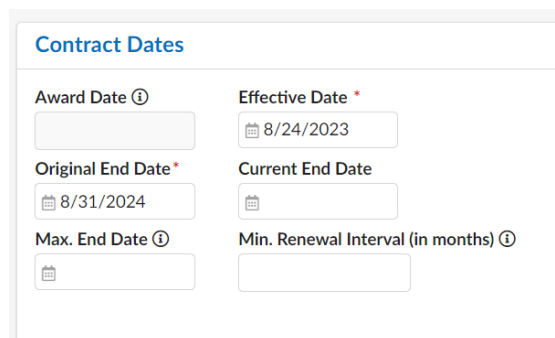
- **Index Number:** If the contract will be part of a group that is tracked with index numbers, users should enter that here.
- **Supplier:** This field will be populated automatically with the Supplier awarded from the solicitation.
- **Minimum Contract Purchase Amount:** Users can indicate here whether or not there is a minimum dollar amount required to make an order referencing this contract.
- **Request to Purchase:** If an RTP was created that led to the creation of this contract, users can select it here in the drop-down menu. Note that the RTP must be available in OhioBuys for users to select it.

- **Sourcing Project Description:** Will populate automatically with a description of the solicitation if one was entered on the sourcing project (e.g., SRC0000019376 - Laboratory Equipment Maintenance, Supplies, and Licensing)



- **Business Unit:** If there is a specific business unit that is associated with the contract, users can select it from the drop-down menu. (e.g., DAS01)
- **Public Comments:** Users can enter comments about the nature and contents of the contract here. These comments will be available to the public on the OhioBuys Browse Public Contracts page.
- **Controlling Board Number:** If a controlling board number was obtained prior to creating the contract, or if one needs to be added as part of the approval process, users can select it here.
- **Pre-Governance Contract:** Activate this slider if the contract will be a pre-governance contract.
- **On Hold:** This slider should be activated if the contract is to be put on hold.
- **Release and Permit:** If a release and permit was obtained prior to creating the contract, or if one is required as part of the contract approval process, users can select it here.
- **Contract Group:** If the contract is part of a contract group, users can explain that here.
- **Biennium Fiscal Year 1/2:** Users can select the biennium fiscal year(s) associated with the contract if applicable.
- **Biennium Fiscal Year 1/2 Amount:** Users can set the dollar amount associated with the contract for a given fiscal year in the biennium if applicable.
- **Order Supplier:** Populate this field if there is a specific Order Supplier that the Supplier has indicated should be used on all purchases referencing this contract.

Contract Dates



In the contract date section, users must populate the following mandatory fields:

- **Effective Date:** The contract start date.
- **Original End Date:** The date the contract is scheduled to end prior to its first amendment (if applicable).

Additional date fields are:

- **Award Date:** Will automatically populate with the date on which the contract is signed and awarded.
- **Current End Date:** The date the contract is scheduled to end as of the current amendment (if applicable).
- **Max. End Date:** The last date on which a contract amendment can be scheduled to end for this contract.
- **Min Renewal Interval:** The measure in months of the minimum amount of time for a contract renewal via amendment.

Contract Hierarchy

The image shows a form titled "Contract Hierarchy" with four input fields, each with a dropdown arrow on the right side:

- Parent Contract
- Master Contract
- Predecessor Contract
- Successor Contract

In the contract hierarchy section:

- **Predecessor Contract:** The contract that preceded the contract currently being viewed. When a contract reaches the end of the Contract Signature step, the Predecessor Contract will be updated by the system with the current contract's State Contract Number in the "Successor Contract" field.
- **Successor Contract:** The contract that replaced the contract currently being viewed.

Both the Predecessor Contract and Successor Contract are editable by the following profiles:

- Agency Contract Analysts, Contract Analysts, Agency Procurement Managers, Procurement Managers, DOT Procurement Managers, DOT Contract Analysts, Real Estate Contract Analysts, Printing Procurement Managers, and Printing Contract Analysts

except in the following circumstances:

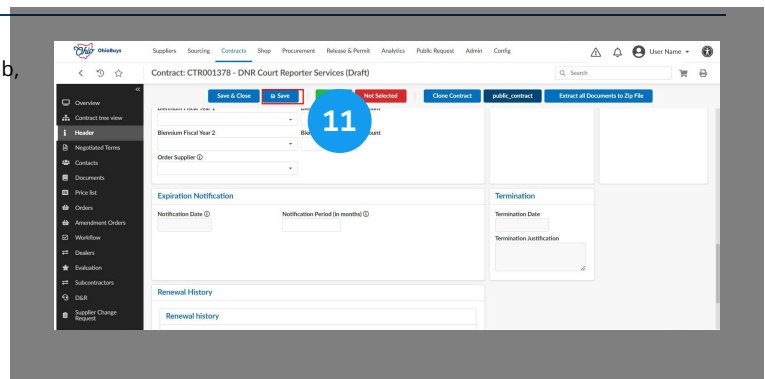
- If contract owner = DAS, OIT, or CRP then only contract analysts and procurement managers can edit.
- If contract owner = DOT, then only DOT contract analysts and DOT procurement managers can edit.
- If contract owner = SPR, then only Printing contract analysts and printing procurement managers can edit.
- If contract owner = DAS and contract type = real estate, then only Real Estate Contract Analysts can edit.

▲ Note

Note that when the **Contract Owner** field is set to CNS, the **Original End Date** field is no longer mandatory.

Click Save

11. After completing the information on the contract Header tab, click **Save**.



Contract Types and Sub-Types

Contract Type	Contract Sub-Type	Who Can Create This Contract Type?
Competitive Selection	a. Statewide Contract b. Multi-Agency Contract c. Single Agency Contract d. Printing	<ul style="list-style-type: none"> • DAS Office of Procurement Services • DAS Office of State Printing and Mail Services • Department of Transportation
Competitive Selection - Two Phase	a. Statewide Contract Pre-Quals b. Multi-Agency Contract Pre-Quals c. Single Agency Contract Pre-Quals d. Statewide Contract Quote e. Multi-Agency Contract Quote f. Single Agency Contract Quote g. DOT Multiple Awards	<ul style="list-style-type: none"> • DAS Office of Procurement Services • Department of Transportation
Waiver of Competitive Selection	a. Master Cloud Services Agreement b. Master License Agreement c. Master Maintenance Agreement d. Master Services Agreement e. State Term Schedule S&LG, GSA, DOD, or VA	<ul style="list-style-type: none"> • DAS Office of Procurement Services (for all contract sub-types except for Commercial Lease Agreements)
Agency Administered	a. Personal Services Agreement b. General Services Agreement c. General goods Agreement d. Professional Services Agreement e. Grant Agreement f. Memorandum of Understanding	<ul style="list-style-type: none"> • All State Agencies (excluding DAS Office of Procurement Services)
Requisite Program	1. DRC - Ohio Penal Industries (OPI) 2. DAS - Community Rehabilitation Program (CRP) 3. OOD - Business Enterprise Program 4. DAS - Office of Information Technology (OIT) 5. DAS - State Printing and Mail Services 6. DMH - Ohio Pharmacy Services 7. Ohio Facilities Construction Commission (OFCC) 8. OFCC Local Agency Administered Agreement	<ul style="list-style-type: none"> • Applicable Requisite Program (i.e. OPI, CRP, OOD-Business Enterprise Program, OIT, DAS-State Printing and Mail Services, DMH-Ohio Pharmacy Services, OFCC)
Comparison	a. Comparison	<ul style="list-style-type: none"> • The purpose of this is to allow DAS to input items offered on punchout catalogs so price audits can be conducted to ensure pricing offered on punchout catalogs is consistent with contracted price.
Real Estate	a. Commercial Lease Agreement	<ul style="list-style-type: none"> • Real Estate Analysts
Direct Purchase	a. Direct Purchase	<ul style="list-style-type: none"> • Catalog Analysts

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.

Completing the Contract Details

Topics

- Add Contract Contacts
- Request an IT Release and Permit (R&P) via the Contract Workflow
- Add Payment & Negotiated Terms
- Upload Supplemental Documents
- Confirm a Price List and Add Contract Tags
- Add Dealers
- Add Subcontractors
- Contract Authoring (MS Word)
- Reviewing a (MS Word) Contract Document
- Contract Authoring (Native)
- Review and Redline a Natively Authored Contract Document
- Submit a Contract for Review

The Main Documents section on the Documents tab of a contract is where users can create and collaborate on contract documents and take advantage of OhioBuys contract authoring functionality and contract document workflow.

- “Main Contract,” and “Main Contract (Upgrade)” Both options will allow users to leverage the preconfigured templates and clauses available for your organization in OhioBuys.
 - Selecting “Main Contract” and choosing to leverage Native Authoring will provide you with the ability to leverage existing clauses, view specific clause history, and add comments associated with each clause.
 - Selecting “Main Contract (Upgrade)” will offer all of the same Native Authoring capabilities of the Main Contract option, plus a more advanced commenting system and access to the contract document approval workflow.

The Electronic Signature section on the Documents tab of a contract is intended for uploading documents that will be electronically signed using OhioBuys’ integration with OneSpan Sign.

The Supplemental Documents section on the Documents tab of a contract is intended for contracts completed outside of OhioBuys prior to being uploaded.

- Documents uploaded in the Supplemental Documents section on the Documents tab of a contract are not compatible with Contract Authoring.

Ohio OhioBuys Adding Contract Contacts

Updated: 09/19/2025 02:15 PM

Version: 9.0

1 Purpose & Profiles

This job aid walks through the process of adding supplier contacts and internal team members to a contract record.

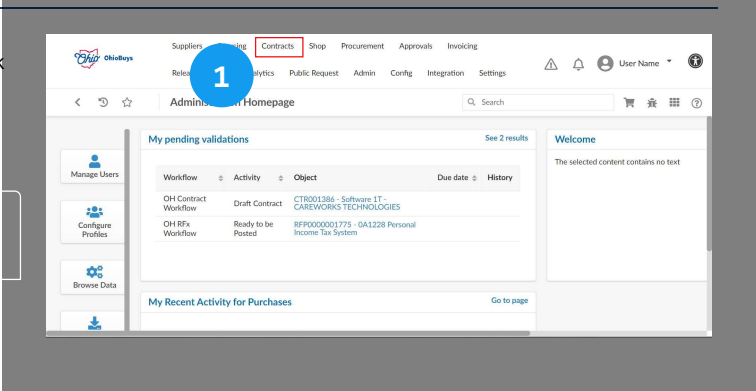
Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, DAS Procurement Manager, Procurement Manager

Used When

Reference this when a new contract record is created in OhioBuys.

Click Browse Contracts

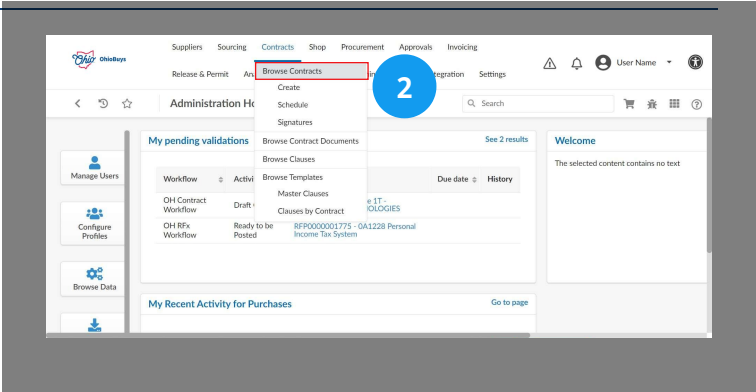
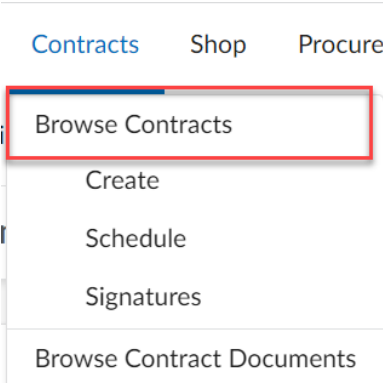
1. Log in to OhioBuys. From the Main Menu Navigation Bar, click **Contracts**.



Contracts

Click Browse Contracts

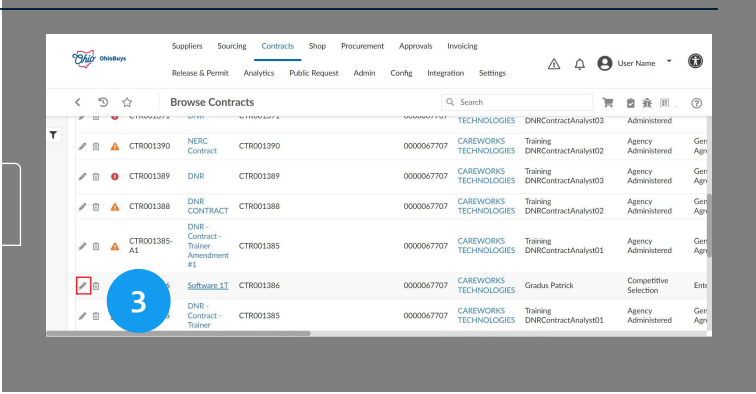
2. Select **Browse Contracts** from the drop-down menu.



Click the desired contract

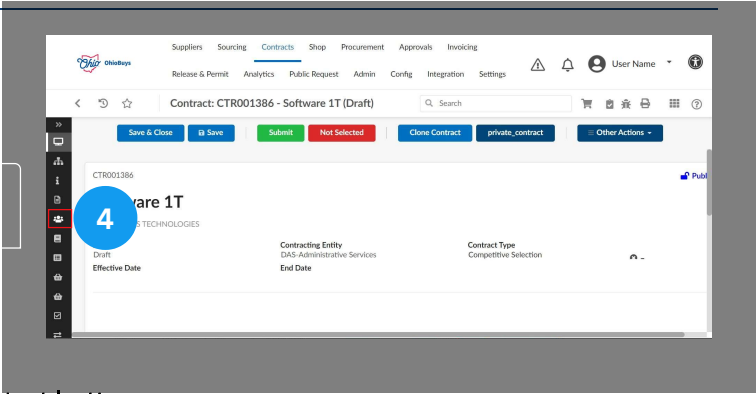
3. Click the desired contract **Pencil** icon to open the contract.

Pencil Icon:



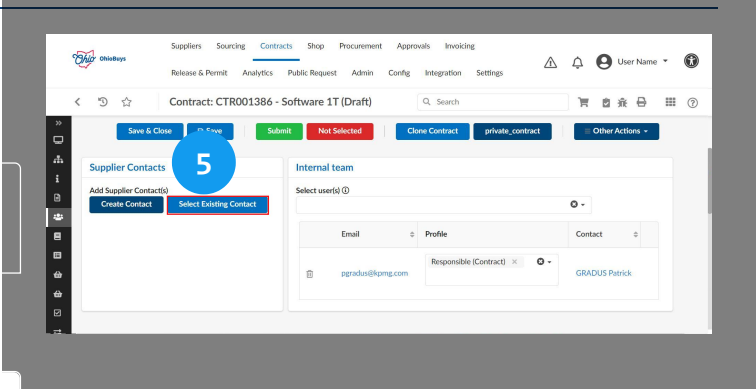
Click the Contacts tab

4. Navigate to the **Contacts** tab.



To add a Supplier contact, click the Select Existing Contact button

5. Click the **Select Existing Contact**.

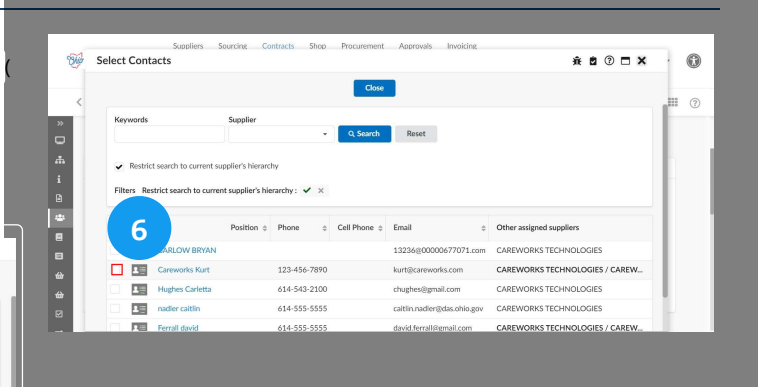
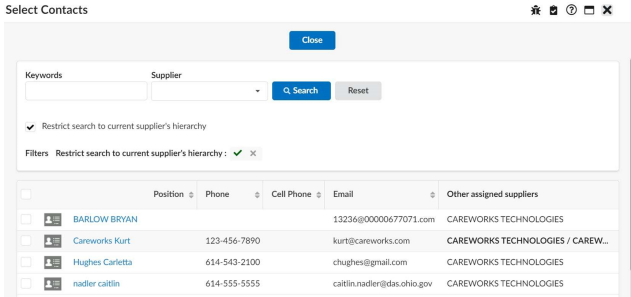


▲ Note

- If the Supplier will be responsible for submitting redlines in OhioBuys, then a contact must be selected in order for them to be able to edit the contract. Supplier contacts not selected will have view-only access.
- If a Supplier contact does not exist in OhioBuys, please reach out to the Supplier and ask them to update their contacts.

Click the contact checkbox

6. Scroll to the relevant Supplier contact and click the **Checkbox** () icon next to their name. The Supplier contact has been added to the contract record.



▲ Note

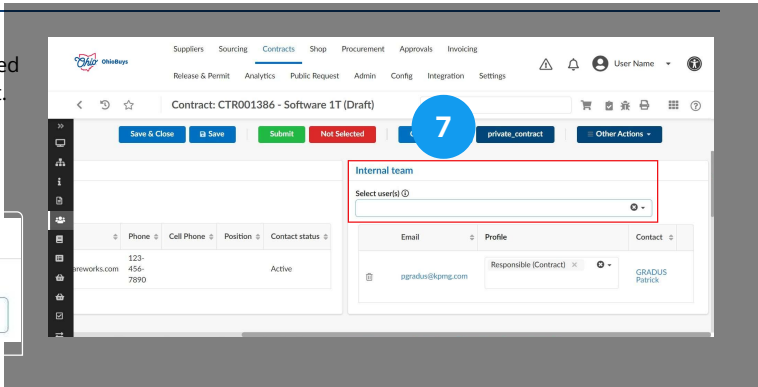
- You can also input a keyword in the Keywords field or select a Supplier from the Supplier field and then click Search to find a specific Supplier contact.
- If no Supplier contacts exist or if a Supplier contact is not selected, make sure the Bypass Negotiation? checkbox on the Header tab of the contract is selected. If this checkbox is not selected and no Supplier contacts have been added, the contract will route to your Agency Admins when the contract is submitted.

Select an internal team member

7. The "Internal team" lists all state employees, who can be added as team members to view and approve the details of this contract. Type the internal contact's name in the Select user(s) field.

Internal team

Select user(s)

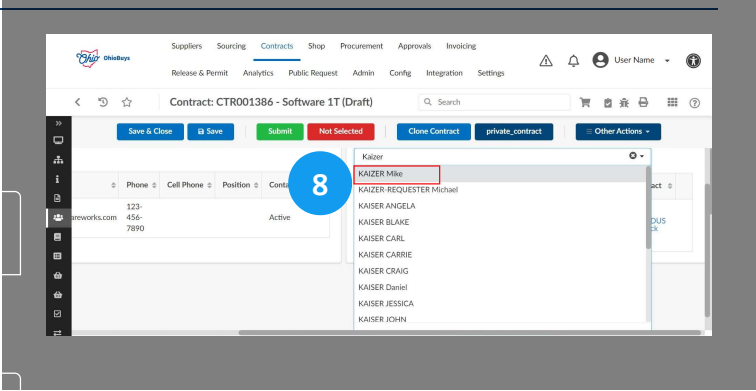


Select internal contact

8. Select the internal contact's name in the **Select user(s)** field and select their name from the drop-down menu.

KAIZER Mike

[See All](#)

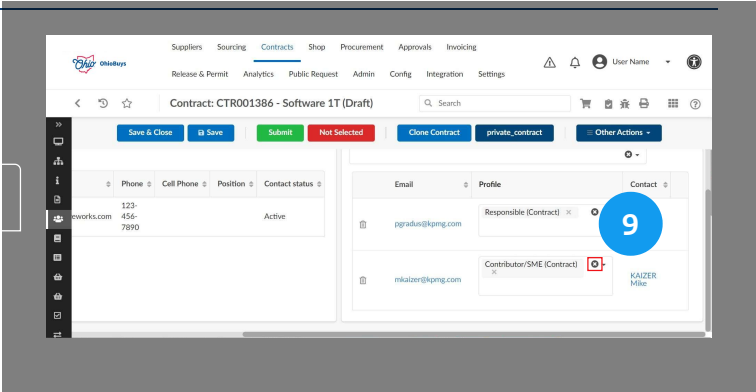


If selecting a contact that shares a name with multiple users, click **See All** to see more details and ensure the correct team member is added.

Click X to remove assigned profile

9. Click the X icon to remove the assigned profile.

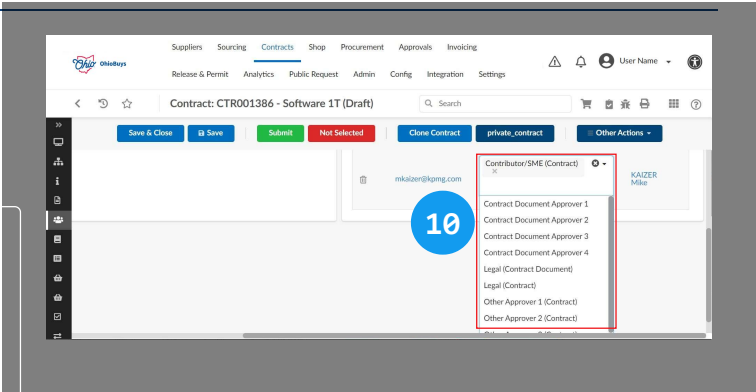
X Icon:



Select the desired profile change

10. Click the **Selector** (▼) icon and select the applicable profile from the drop-down menu.

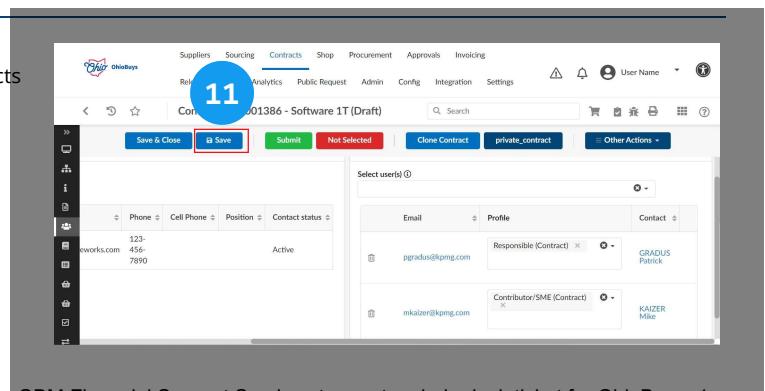
- Contributor/SME (Contract) X ▼
- Contract Document Approver 1
- Contract Document Approver 2
- Contract Document Approver 3
- Contract Document Approver 4
- Legal (Contract Document)
- Legal (Contract)
- Other Approver 1 (Contract)
- Other Approver 2 (Contract)



- **Reviewer:** This role allows a user to view and edit a contract.
 - **Legal (Contract):** This role pulls in a user during the Legal Approver step of the contract approval workflow. This role cannot edit the contract.
- ▲ If you would like your agency's legal users to be able to review and redline your Main Contract documents when the contract is being drafted and before it formally goes to the Legal Approver step of the workflow, please also assign your legal users the Contributor/SME (Contract) profile if you would like for them to be able to edit the contract document. If you would like for them to only review please refer to the Legal (Contract Document) role. If multiple Legal Approvers are assigned, they will each need to approve the contract in order for it to advance. (e.g., if two Legal Approvers are assigned, and one Other Approver 1 is assigned, both of the Legal Approvers will need to approve the contract before it goes to the Other Approver 1.
- **Legal (Contract Document):** This role pulls in a user during the Legal Approver step of the contract document workflow. This role cannot edit the contract. If multiple Legal Approvers are assigned, they will each need to approve the contract in order for it to advance.
 - **Other Approver 1/2/3/4 (Contract):** This role pulls in a user during the Other Approvers step of the contract approval workflow. This role cannot edit the contract.
- ▲ Other Approvers can be selected in a sequential order with up to 4 levels (i.e., Other Approver 1, Other Approver 2, etc.) Multiple approvers can also be assigned within each Other Approver level. All Other Approvers at a given level will need to approve the contract in order for it to advance.
- **Contract Document Approver 1/2/3/4:** This role pulls in a user during the Document Approvers step of the contract document workflow. This role cannot edit the contract.
- ▲ Contract Document Approvers can be selected in a sequential order with up to 4 levels (i.e., Contract Document Approver 1, Contract Document Approver 2, etc.) Multiple approvers can also be assigned within each Contract Document Approver level. All Contract Document Approvers at a given level will need to approve the contract document in order for it to advance.
- **Responsible (Contract):** This role can be assigned to multiple users. The user(s) are responsible for managing the contract and will receive automatic notifications from OhioBuys regarding renewals amendments, and change requests.
 - **Contributor/SME (Contract):** This role allows a user to have the ability to find the contract in Browse Contracts page and review/redline Main Contract documents.

Click the Save button

11. Click the **Save** button and continue to add additional contacts as needed.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



Requesting an IT Release and Permit (R&P) via the Contract Workflow

Updated: 10/13/2025 05:04 PM

Version: 6.0

1 Purpose & Profiles

This job aid covers the additional steps required to set up a contract that will need an IT Release & Permit (R&P).

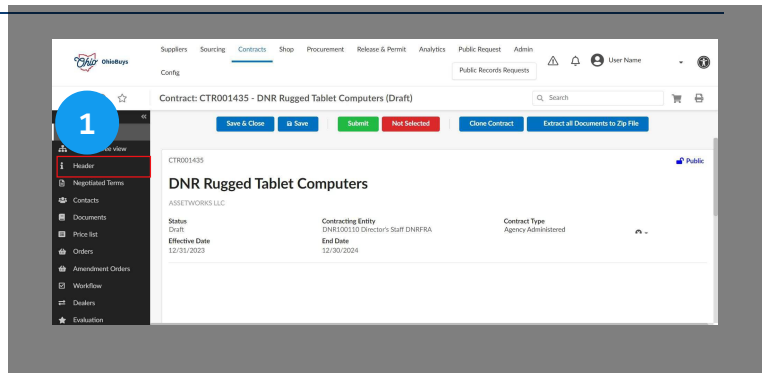
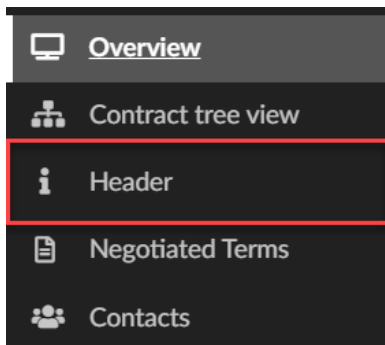
Profiles: Contract Analyst, Procurement Manager, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, Agency Procurement Manager

2 Used When

Reference this when setting up IT contract that requires a R&P.

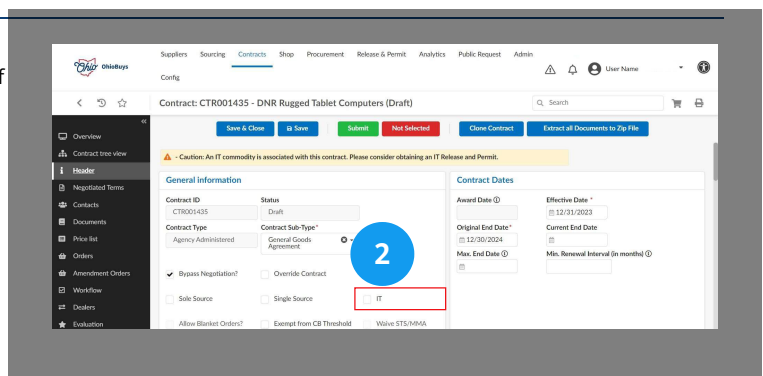
Header Tab

1. After opening a contract, navigate to the **Header** tab.



IT Checkbox

2. Engage the IT checkbox in the General Information section of the Header.



▲ Note

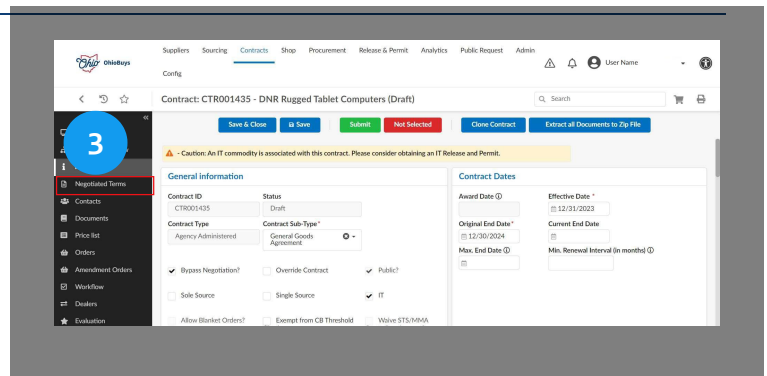
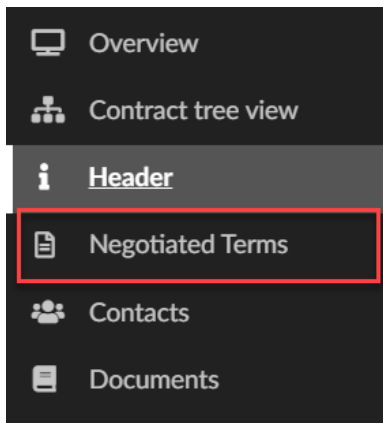
If you are requesting biennium Controlling Board approval as part of this contract, select the **Biennium Fiscal Year 1** and **Biennium Fiscal Year 2** and then enter the **Biennium Fiscal Year Amount** for each fiscal year.

The screenshot shows a form with a sidebar on the left containing menu items: Evaluation, Dealers, Subcontractors, D&R, Supplier Change Request, and Exceptions. The main form area has an 'On Hold' toggle and a 'Contract Group' field. Below these, there are two rows of input fields for biennium fiscal years, highlighted with a red box:

Biennium Fiscal Year	Biennium Fiscal Year Amount
2022 - State of Ohio	1,347,694,870
2023 - State of Ohio	1,392,154,250

Negotiated Terms

3. Navigate to the **Negotiated Terms** tab.

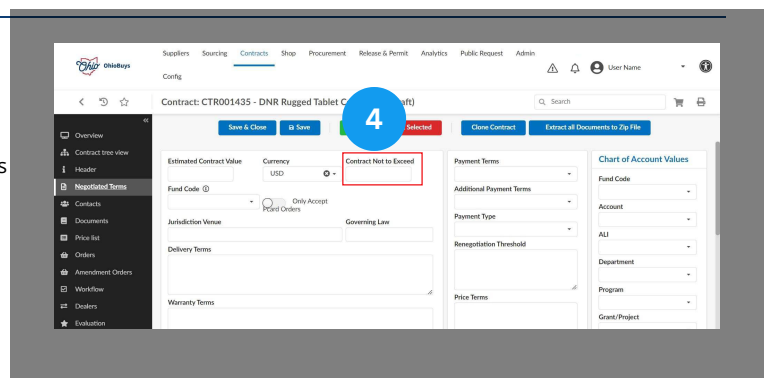


Contract Not to Exceed

4. Enter the **Contract Not To Exceed** value on the Negotiated Terms tab.

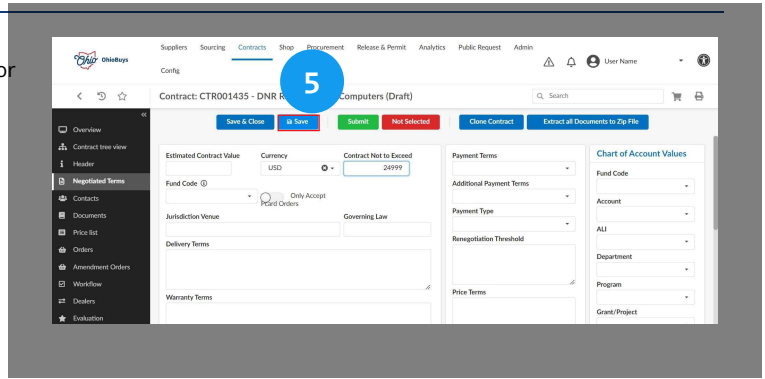
If you entered Biennium Fiscal Year Amounts on the previous page, enter the sum of those two values in this field.

Contract Not to Exceed



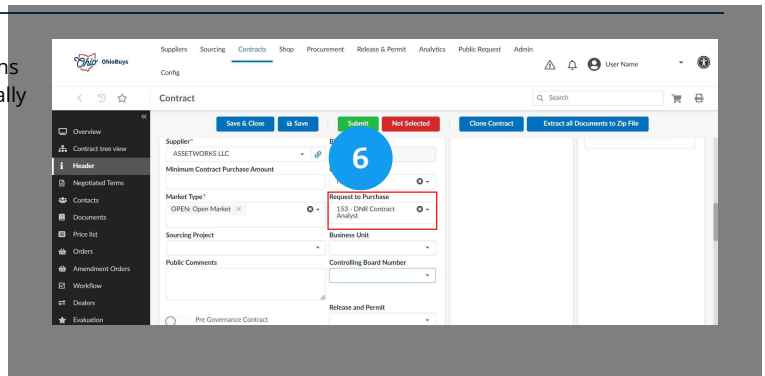
Save

5. Click **Save**, then continue to populate the remaining details for your contract.



Controlling Board and Release & Permit

6. Once your contract is submitted and any Supplier negotiations and internal approvals are received, your contract will automatically route for the necessary IT approvals (e.g., IT SIM, IT SME, EITC Analysts, etc.). After IT has completed their review, an IT R&P number will be generated and will be linked on the **Release & Permit** field on the header of the contract. You will receive an email notification once the necessary approvals have been received.



Controlling Board Number

Release and Permit

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuy's: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys Adding Payment & Negotiated Terms

Updated: 09/11/2025 04:26 PM

Version: 11.0

1 Purpose & Profiles

This job aid covers updating the Payment and Negotiated Terms tab on a contract record.

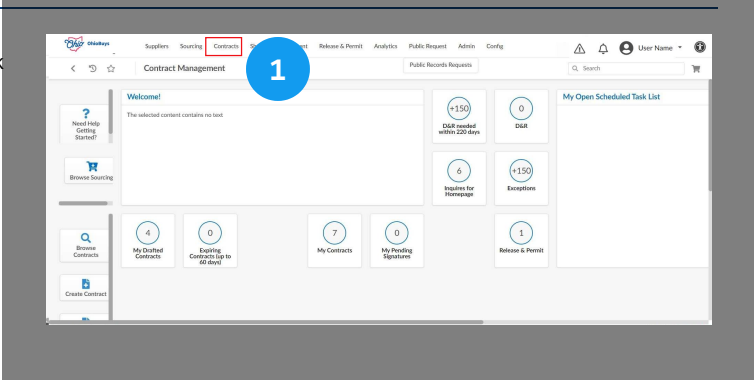
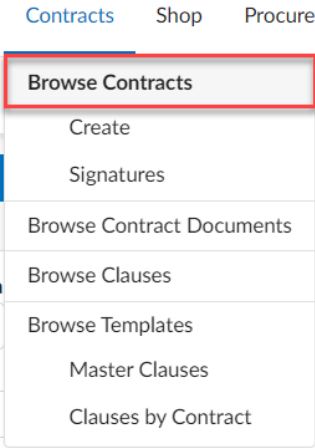
Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, Procurement Manager

Used When

Reference this when adding Payment and Negotiated Terms to a contract document.

Navigate to Contracts

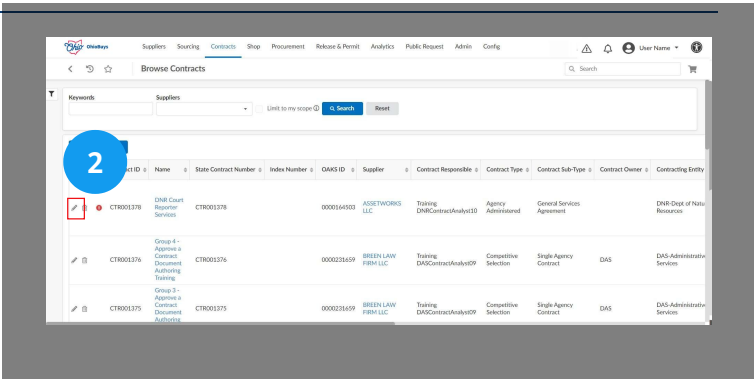
1. Log in to OhioBuys. From the Main Menu Navigation bar, click **Contracts** and then select **Browse Contracts** from the drop-down menu.



Open the Contract

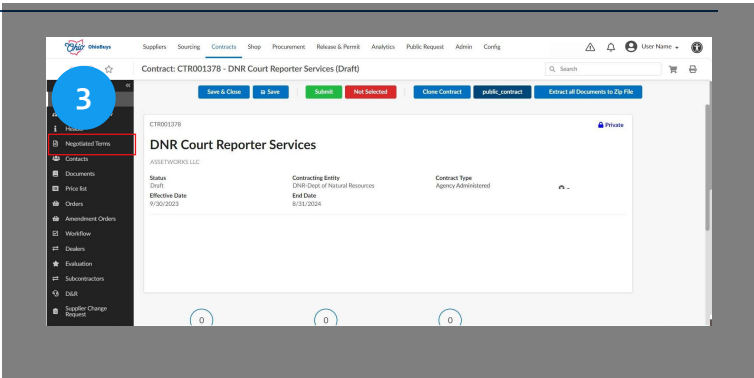
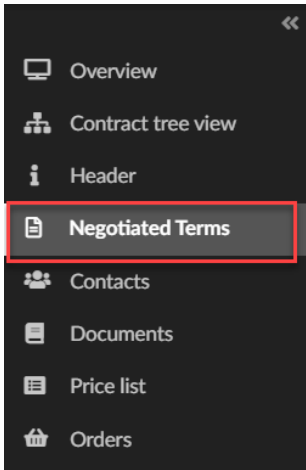
2. Search for the contract you would like to open using the Keywords Search, or the available filters. When you have located the contract you want to update, click the **Pencil** icon.

Pencil icon:



Open Negotiated Terms Tab

3. Navigate to the **Negotiated Terms** tab.



Entering Payment and Negotiated Terms

Though not mandatory when creating a contract, users can fill in the information on the Negotiated Terms tab to serve as a sort of "cheat sheet" for the contract as a whole.

The following fields on the Negotiated Terms tab have downstream implications in the purchasing process when users reference the contract:

- a. Revenue Share %:** This field needs to be completed if the contract is part of a revenue share.
- b. Fund Code:** This field will pre-populate if the contract is part of revenue share. It denotes which fund Revenue Share payments are deposited to.
- c. Contract Not to Exceed:** This field is important if there is a spend ceiling for the contract. Purchases against the contract that exceed the ceiling will be blocked.
 - The Not to Exceed field is required on Agency Administered contracts where the IT box is checked.
 - Controlling Board and/or Release and Permit numbers are not required for certain types of agency-administered contracts (i.e., Grant Agreement, Memorandum of Understanding (MOU)); contracts referencing Controlling Board exempt accounts or Controlling Board Exempt suppliers).
 - Any Agency Administered Contracts with - a not to exceed amount of less than than \$50K and doesn't cause the agency to exceed the Controlling Board threshold with the supplier, or - a Controlling Board exempt account code or supplier, or - a Contract Sub-Type of "Grant Agreement" or "Memorandum of Understanding" will not receive alerts for being over the Controlling Board Threshold.
 - Any Agency Administered Contracts with a not to exceed amount of \$50K or more, but a Biennium Fiscal Year 1 Amount and Biennium Fiscal Year 2 Amount of less than \$50K will not receive alerts for being over the DPA or Controlling Board thresholds.
- d. Payment Terms:** The value in this field transfers into OAKS. Will default to "due immediately" if no other value is selected.
- e. Chart of Account Values (section):** If pre-determined chartfield information for a purchase requisition needs to be established, these values can be documented here. If COA values are established, they will still be editable on the purchase requisition.
- f. The Account field** is required for all non-IT Agency Competitive Selection contracts. This field will be editable at 'Draft' and 'Negotiation in Progress' statuses.

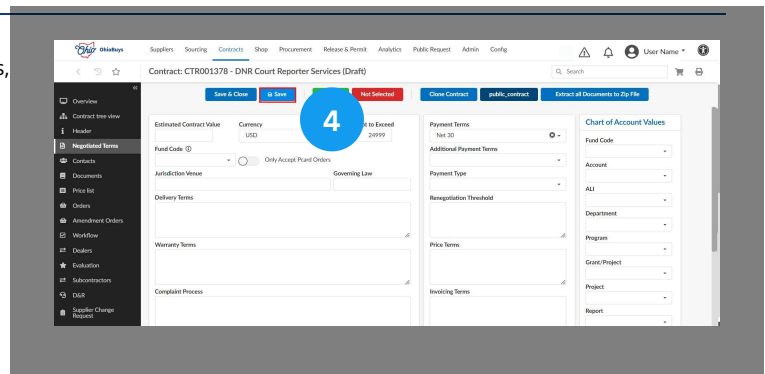
▲ Note

The following fields are also present on the Negotiated Terms tab, and can be completed to provide an at-a-glance overview of the contract's terms. However they have no practical impact for users when purchasing from the contract:

- a. **Estimated Contract Value:** Calculated total of contract based on contracted quantity x individual price point of items listed in Price List.
- b. **Currency:** Lists the currency the contract was negotiated in. (defaults to USD)
- c. **Jurisdiction Venue:** Lists the jurisdiction venue that disputes regarding the contract would fall under. (if applicable)
- d. **Governing Law:** Lists the law(s) covering the contents of the contract. (if applicable)
- e. **Delivery Terms:** Lists any terms related to the delivery of goods on purchase orders.
- f. **Warranty Terms:** Lists any warranties for the product(s) in the contract.
- g. **Complaint Process:** Details how to process a complaint for the Supplier's overall performance or a specific order from the vendor.
- h. **Return Process:** Outlines the terms of returning delivered goods in order to receive a reimbursement for the purchase.
- i. **Choice Criteria:** Any criteria outlined in the contract.
- j. **Additional Payment Terms:** Outlines additional details related to the payment terms within the contract (e.g., standard payment terms might be Net60, except when the total order value falls below a minimum threshold in which case the terms would be Net30).
- k. **Payment Type:** Indicates the preferred method of remitting payment for this agreement. (e.g., Cash, ETF, Pcard, etc.)
- l. **Renegotiation Threshold:** Outlines a threshold that must be reached during the renewal process in order for all of the contract terms to be subject for review and renegotiation.
- m. **Price Terms:** Outlines any stipulations to the agreed upon price(s) within the contract.
- n. **Invoicing Terms:** Lists any terms related to the billing of goods or services on purchase orders.
- o. **Penalties:** Outlines any penalties for violating the contract terms.
- p. **Payment Terms (free text entry):** Outlines any additional payment terms beyond the two captured in the Payment Terms or the Additional Payment Terms fields.

Click Save

4. After entering in any desired Payment and Negotiated Terms, click **Save**.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuy's: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys Uploading Supplemental Documents

Updated: 11/03/2025 03:01 PM

Version: 7.0

1 Purpose & Profiles

This job aid covers this section walks through the process of uploading supplemental documents to a contract record in OhioBuys.

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

Used When

Reference this when a contract record is created in OhioBuys and has a contract document or supplemental documents that should be attached.

▲ Note

- Procurement Managers, Agency Procurement Managers, Printing Procurement Managers, or DOT Procurement Managers are automatically able to add documents to certain types of contracts (e.g., Agency Procurement Managers can add documents to Agency Administered contracts). In addition to these types of users, the user(s) listed as the "Contract Responsible" for the contract can also add documents to their own contract; however, contract contacts who are not the "Contract Responsible" and/or do not have a Procurement Manager profile will be unable to add contract documents.
- Users with the Contributor/SME profile on the Contact tab will not necessarily have the ability to add contract documents, but will be able to review and redline Main Contract documents if they are added as Contract Document Approvers.
- When a contract is created from a solicitation, a Contract Analyst has the ability to select which solicitation documents are carried over to a contract; however, if you would like to include Supplier uploaded documents that were part of a response to a questionnaire, these documents must be downloaded from OhioBuys and manually uploaded to the associated contract. To easily download these documents, navigate to the **Analyze & Award** tab of the solicitation, click the **Checkbox icon(s)** for the Supplier proposals you would like to download, and then click **Download selected proposals**. Doing this will download all Supplier upload proposal documents to your computer, which can then be uploaded to a contract as needed.

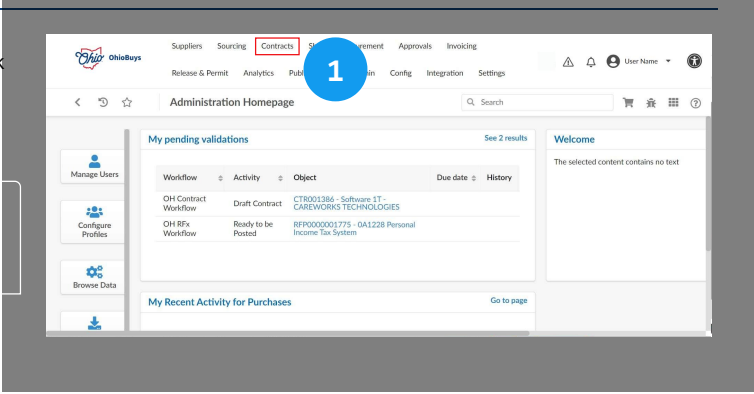
Requests	Suppliers	Proposal	Status	Documents	Proposal Progress	Submitted (UTC-4)	Total	Decision	MBDD Status	Debarment End Date	Agencies Debarred By
Req. 2/7/2023- Precision Laptops - 1	Edi Matrix LLC	Proposal # 1: SPC0000008476	Submitted	2	100%	2/10/2023 11:11:41 AM	7,374,000 USD	⊘	MBE		
Req. 2/7/2023- Precision Laptops - 1	SINGLESOURCE IT	Proposal # 1	Submitted	1	100%	2/8/2023 2:50:34 PM	8,046,000 USD	⊘	Edge MBE		
Req. 2/7/2023- Precision Laptops - 1	INFOVISION21 INC	Proposal # 1	Submitted	1	100%	2/8/2023 1:35:10 PM	8,046,000 USD	⊘			
Req. 2/7/2023- Precision Laptops - 1	BROWN ENTERPRISE SOLUTIONS LLC	Proposal # 1	Submitted	1	100%	2/8/2023 9:25:18 AM	8,046,000 USD	⊘	MBE		

▲ Note

If you plan to author the contract outside of OhioBuys, refer to the Contract Authoring section of this learner guide.

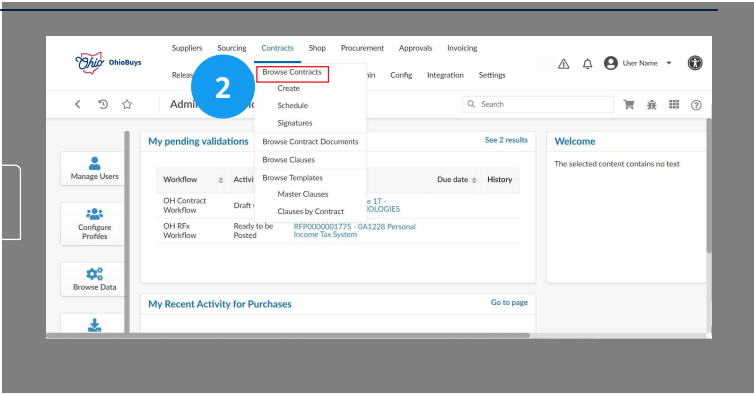
Click Contracts tab

1. Log in to OhioBuys. From the Main Menu Navigation Bar, click **Contracts**.



Click Browse Contracts

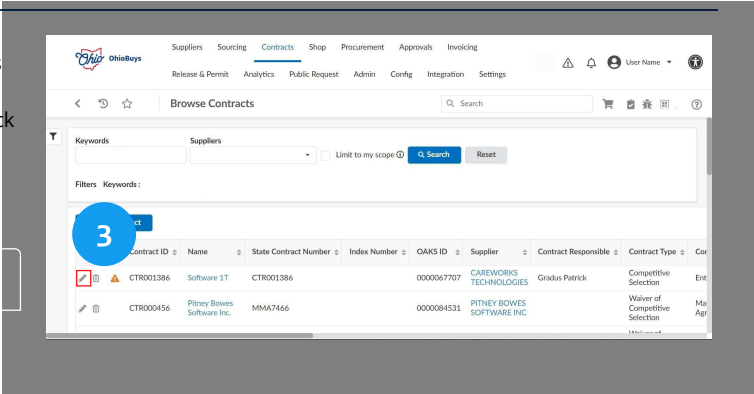
2. Click **Browse Contracts** from the drop-down menu.



Click the Pencil icon

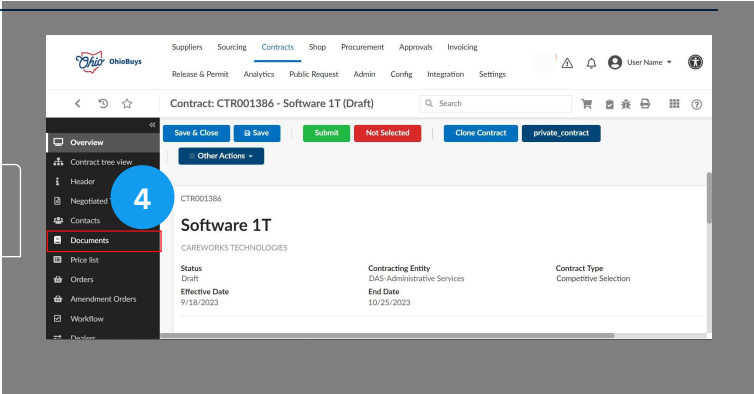
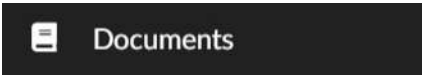
3. Locate the contract you would like to edit using the Keywords search. Once you have located the contract you would like to edit, click the **Pencil icon** to open it.

Pencil icon: 



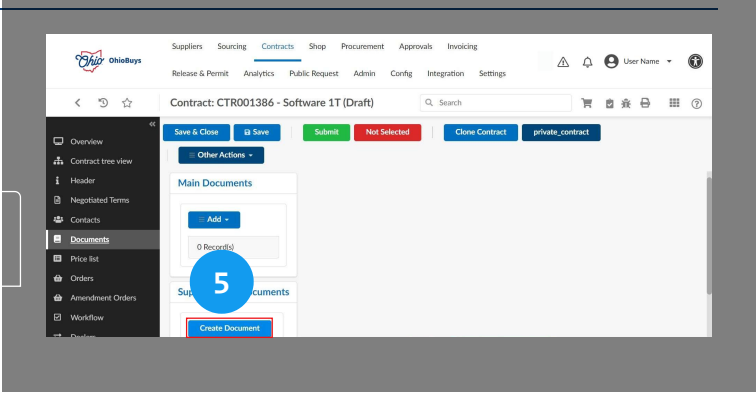
Click Documents

4. Navigate to the **Documents** tab.



Click Create Document

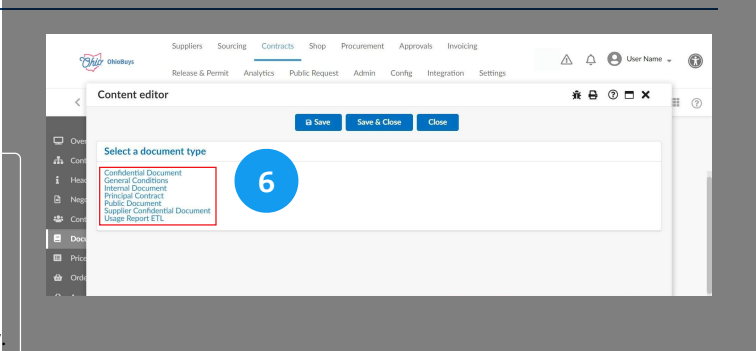
5. Under the Supplemental Documents section, click the **Create Document** button.



Select a Document Type

6. Select the desired document type.

- **Confidential Document:** Only visible to the contract team in the confidential documents tab, and users with the Confidential Documents role. An example would be specific information related to a subcontractor like pricing.
- **Internal Document:** Visible to all agency users who can see that contract.
- **Public Document:** Documents that are to be posted publicly. An example would be a redacted version of the entire contract document (since an authored document is not posted to the public portal). These are visible to any agency users who can see the contract internally and all public visitors.
- **Supplier Confidential Document:** These documents are only visible to the contract team, Suppliers on the contract, and users with the Confidential Documents role. An example of this would be floor plans of building that should only be visible to the internal and supplier contacts on the contract, not all State users with access to the contract.



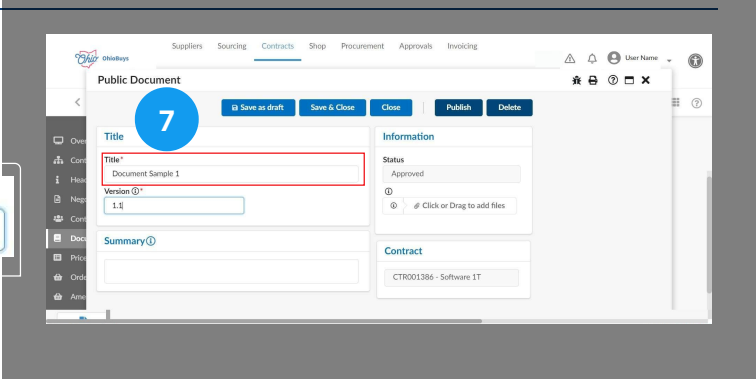
Select a document type

- Confidential Document
- General Conditions
- Internal Document
- Principal Contract
- Public Document
- Supplier Confidential Document
- Usage Report ETL

Enter the Document Title

7. Enter a name for the document in the **Title** field.

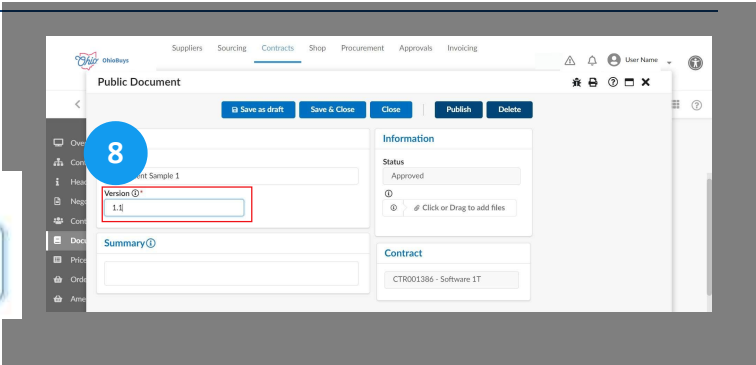
Title*
Document Sample 1|



Insert Document Version

8. Update the document **Version** number as appropriate.

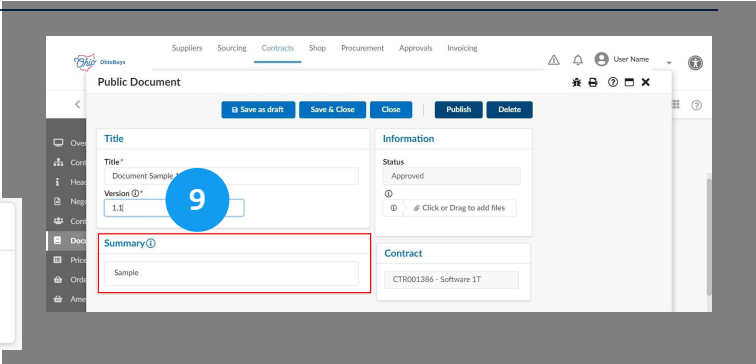
Version ⓘ*
1.1|



Enter Document Summary

9. Complete the **Summary** field by inserting a thorough description of the document.

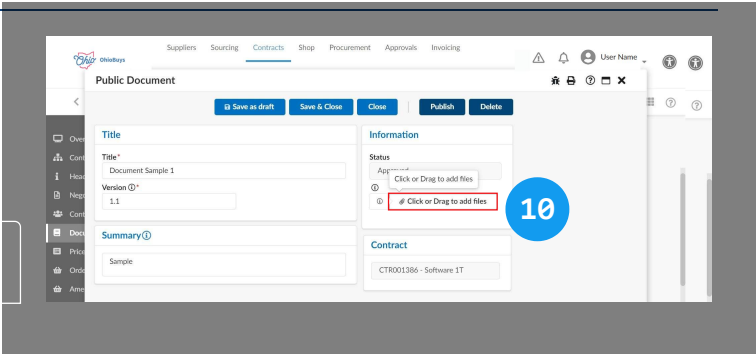
Summary ⓘ
Sample



Upload document

10. Click the **Click or Drag to add files** button to a upload document. Then select the document to be attached from your desktop.

Click or Drag to add files

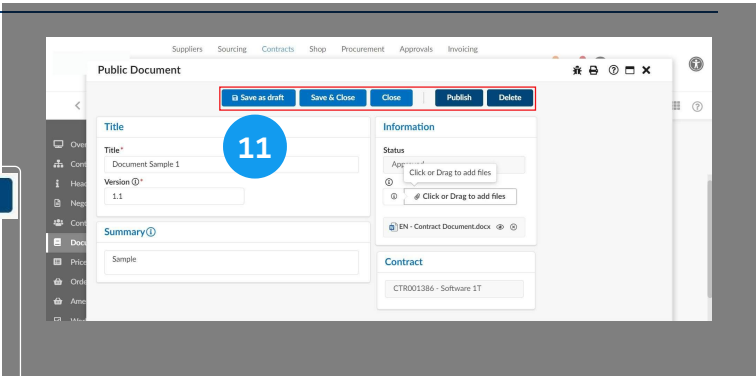


Complete Upload

11. Click **Save & Close**.



- a. To save as a draft and finish later, click **Save as draft**.
- b. To save as a draft and close the window, click **Save & Close**.
- c. To publish the final version, click **Publish**.
- d. If you have saved a draft, but wish to cancel the document click **Delete**.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.

Ohio OhioBuys Confirming a Price List and Add Contract Tags

Updated: 10/07/2025 04:12 PM

Version: 6.0

1 Purpose & Profiles

This job aid covers the process for reviewing the price list on a contract and adding contract tags.

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

Used When

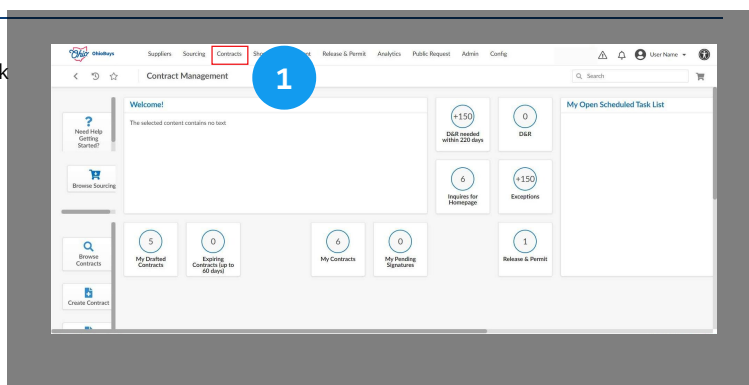
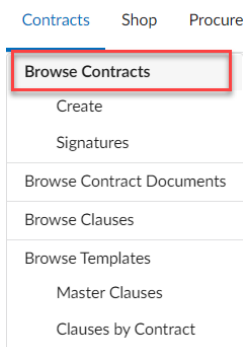
Reference this when confirming the price list on a contract created from a solicitation in OhioBuys.

▲ Note

- Confirming a price list is an opportunity for a user to review the details of items that have been transferred from a solicitation or are being added as part of the contract setup process. The price list should reflect the items housed within the contract document and functions as a “cheat sheet” for anyone viewing the contract record. It is also the precursor for a hosted catalog. For more information managing catalogs refer to the [Managing Hosted Catalogs Learner Guide](#).
- During negotiations, the catalog import process should be initiated and occur simultaneously with the contract approval process. If not, items may be added to the catalog with missing information. For more information on the process for importing a hosted catalog or initiating a punchout catalog, refer to the [Managing Hosted Catalogs Learner Guide](#) linked above.

Navigate to Contracts

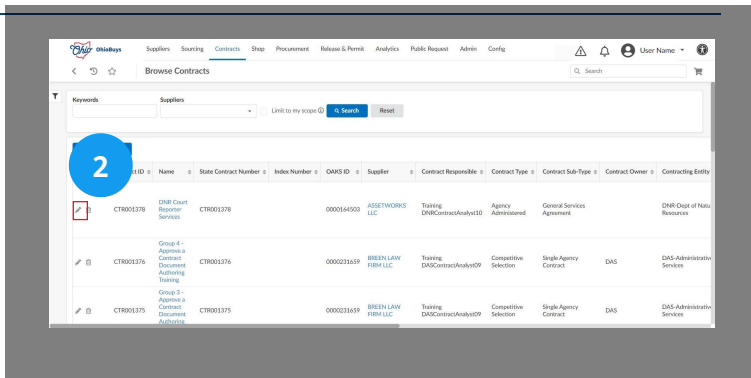
1. Log in to OhioBuys. From the Main Menu Navigation bar, click **Contracts** and then select **Browse Contracts** from the drop-down menu.



Open Contract

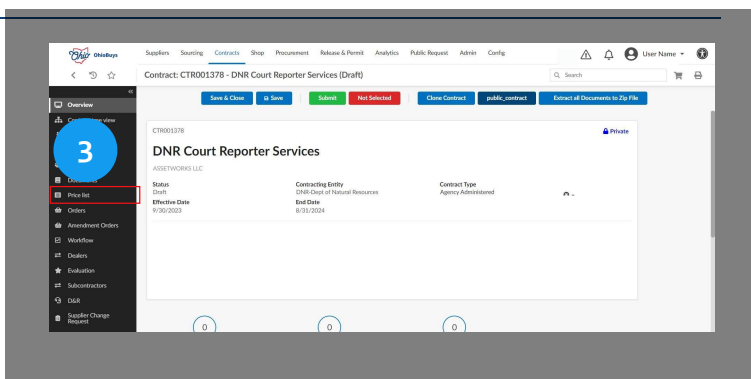
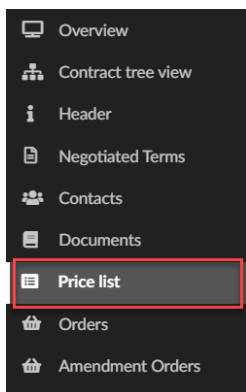
2. Search for the contract you would like to open using the Keywords Search, or the available filters. When you have located the contract you want to update, click the **Pencil** icon.

Pencil icon:



Open Price List Tab

3. Navigate to the **Price list** tab.



Updating Contract Tags

Create Item

Contract Type
Agency Administered

Export Price List

Contract Tags
Agency Administered

Update Date

Quantity	Commodity	Product Code	Name	Product Reference	Price	Currency	UOM	Validity Start Date	Validity End Date	Tag	Availability	Sourcing Event	In
	Court reporting services	I1_1	Court Reporter Services		39.000	USD	Hours	9/30/2023	8/31/2024			PR000898 / I1_1	
	Court reporting services	I1_2	Court Reporter Services OT		19.000	USD	Hours	9/30/2023	8/31/2024			PR000898 / I1_2	

2 Record(s)

Users should review the displayed item grid to see the goods and/or services that are offered as part of the contract. If you would like add tags to your contract's price list, select the appropriate tags (e.g., Dealer, Mandatory – First Requisite Program, etc.) from the **Contract Tags** field. Adding tags on this page will ensure the contract's goods and/or services are displayed by default on the **Browse Items** page. You should only add tags to your contract as applicable.

Contract Tags

Agency Administered ✕

I

Agency Contract

Comparison Item

Dangerous

Dealer

External Item

Mandatory- DAS Contract

Mandatory- First Requisite Programs

Mandatory- Second Requisite Programs

MBE Set-aside

Requires Quote

[See All](#)

After updating the Contract Tags field with the appropriate tags, click **Save**.



▲ Note

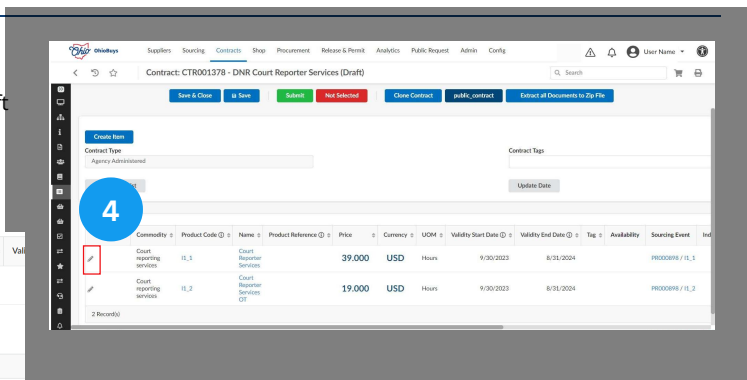
To remove a **Contract Tag** click the X icon next to the tag you would like to remove and then click **Save**.

Review and Edit Individual items

4. Review the individual items contained in the Price List. If updates need to be made to an item, click the **Pencil** icon to its left to open it.

Quantity	Commodity	Product Code	Name	Product Reference	Price	Currency	UOM	Validity Start Date	Validity End Date	Availability	Sourcing Event
	Court reporting services	I1.1	Court Reporter Services		39,000	USD	Hours	9/30/2023			PR000898 / I1.1
	Court reporting services	I1.2	Court Reporter Services OT		19,000	USD	Hours	9/30/2023			PR000898 / I1.2

2 Record(s)



Product Information

Product Information

Product Label*
Court Reporter Services

Product Code*
I1.1

Existing Product
[Dropdown]

Product Reference ⓘ*
CR01

Type*
Services

Commodity*
82111603 - Court reporting services

Manufacturer*
ASSETWORKS LLC

Generic Product ⓘ

Characteristics Group
[Text Field]

Link to Catalog
[Text Field]

Services Type ⓘ*
[Dropdown]

Post to Catalog
Yes

Product Characteristics
[Text Area]

Detailed Description

Description*
Court Reporter Services - Normal Hourly charge

Keywords
[Text Field]

Summary

[Text Area]

File Upload

Click or Drag to add a picture

Click or Drag to add files

Users with either the Catalog Analyst or the Agency Catalog Analyst profiles are able to make updates to the **Product Information** page on an item in a contract price list. For more information on managing items and hosted catalogs, please consult the Managing Hosted Catalogs Learner Guide linked at the beginning of this asset. If you do make any updates to the Product information, click **Save**.

▲ Note

- All items flipped from a solicitation will need to be updated to include commodity codes on the price list.
- The Bidder/Supplier will carry into the item information as the Manufacturer. To avoid errors during purchasing, the Supplier must be identified as a Manufacturer. To add the Supplier as a Manufacturer, submit a request to the Catalog Management team by emailing ohiosharedservices@ohio.gov.
- For more information on how to use these fields, refer to the Managing Hosted Catalogs Learner Guide linked at the beginning of this document.

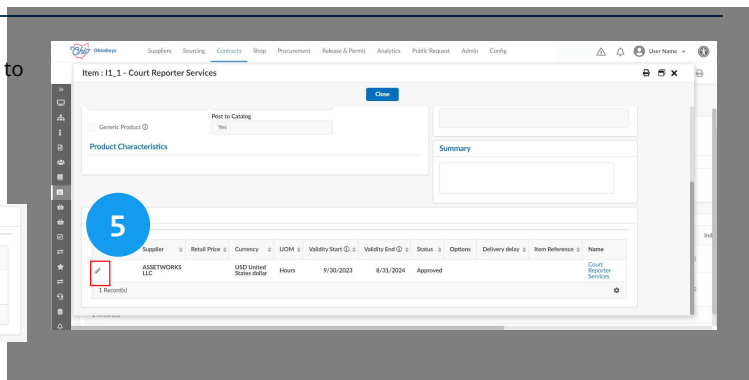
Edit Additional Item Information

5. To make updates to additional item information, scroll down to the Other Items section and click the **Pencil** icon next to the item.

Other Items

Supplier	Retail Price	Currency	UOM	Validity Start	Validity End	Status	Options	Delivery delay	Item Reference	Name
ASSETWORKS LLC	USD United States dollar	Hours	9/30/2023	8/31/2024	Approved					Court Reporter Services

1 Record(s)



Additional Item Information

Item tag:

Item description

Item Code: Name*: Monthly virtual training (2 one-hour trainings per ...

Supplier*: #1 Supply & Rental LLC

Supplier Contact: KIEHL, Melissa

Punchout:

Packaging:

Incoterm:

Incoterm Location:

Shipping Mode:

Contract*: CTR013387 - Managing Contracts LG test

Effective Date: 3/21/2023

To (include): 4/30/2023

Catalog Link:

Comparison Item

Pricing

Validity Start Date: 3/21/2023

Validity End Date: 4/30/2023

Status*: Approved

Retail price (Total):

Retail Price (Excl. Tax):

Currency*: USD

Minimum Order Quantity:

Negotiated Quantity: 20,000

UOM: Each

+ Add new price by quantity

Quantity	Price (Excl. Tax)	Price (Incl. Tax)
0.000	650.000	650.000

Example: Quantity=1 Price=650

Comments

Options and Substitute Items

Is an option

Select Options:

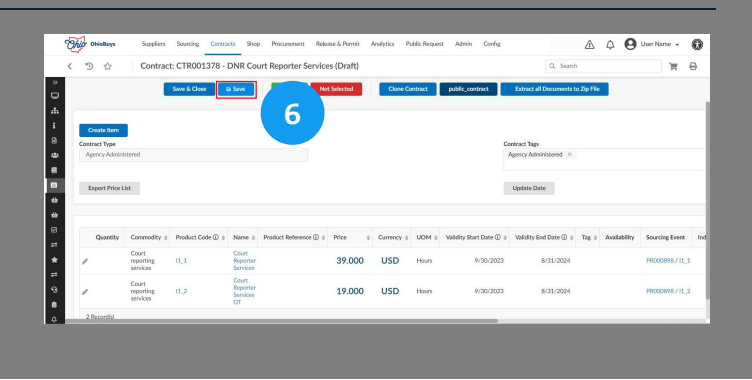
On this page, users can confirm additional information about the item such as validity dates and pricing. For more details on how to use these fields, and on creating and managing items more broadly, please refer to the [Managing Hosted Catalogs Learner Guide](#) found on the [OhioBuys Agency Training Website](#).

Note

If added to the Team, the Approvers and the Supplier will be able to review item information updated on the Price List tab.

Save Updates

6. After completing your updates and confirming the price list, click **Save**.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuy: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



Updated: 11/03/2025 03:11 PM

Version: 7.0

1 Purpose & Profiles

This job aid covers the process of adding dealers to a contract record.

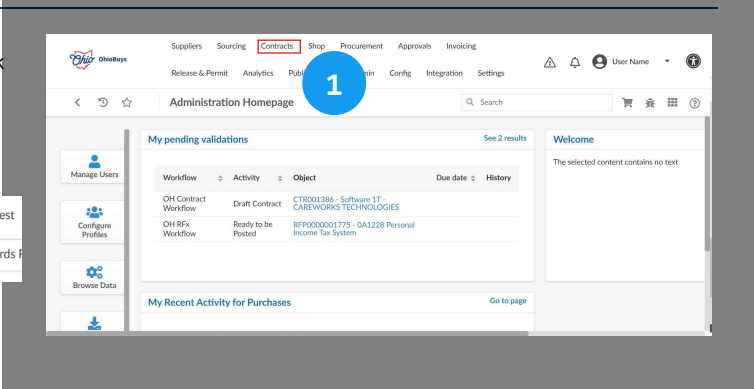
Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, Procurement Manager, Agency Procurement Manager

Used When

Reference this when a contract record is created in OhioBuys and dealers will need to be listed on the contract.

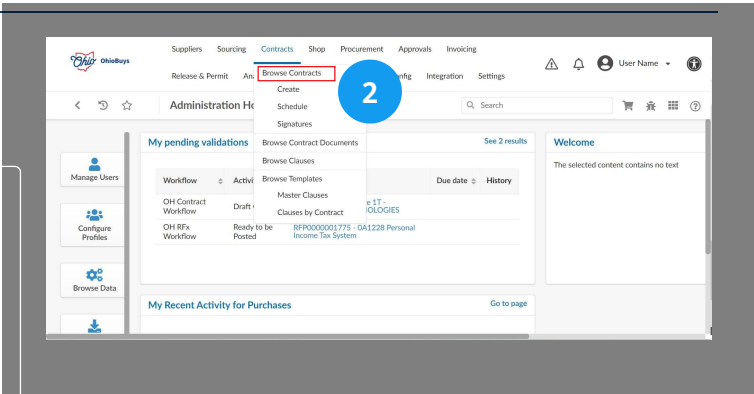
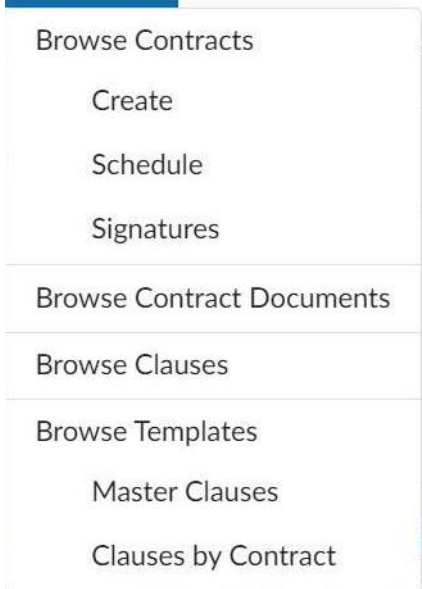
Click Contracts

1. Log in to OhioBuys. From the Main Menu Navigation Bar, click **Contracts**.



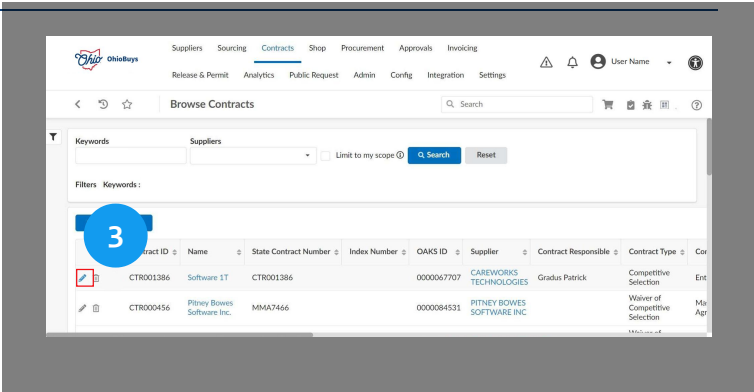
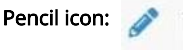
Click Browse Contracts

2. Select **Browse Contracts** from the drop-down menu.



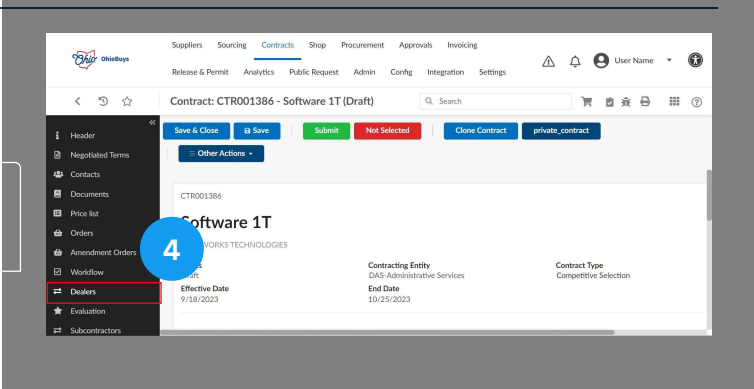
Click the Pencil icon

3. Locate the contract you would like to edit using Keywords search. Once you have located the contract you would like to edit, click the **Pencil icon** to open it.



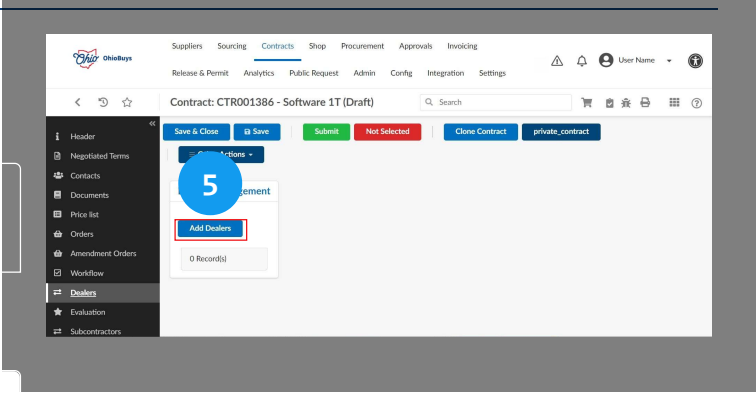
Click Dealers

4. From within the contract, navigate to the **Dealers** tab.



Click Add Dealers

5. Click the **Add Dealers** button.



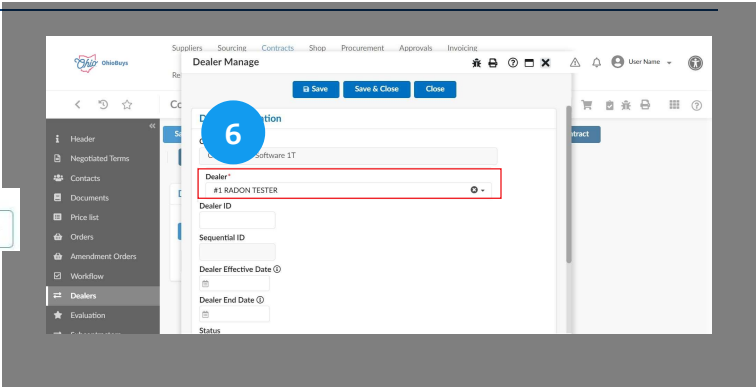
Note

- Dealers are entities that are authorized to resell a product, supply or service from a product or supply manufacturer, and/or service provider.
- For example, Lenovo would be the parent Supplier or contractor on a contract, but a dealer would be a Supplier that fulfills the purchase order for the State.

Enter Dealer Name

6. Type in the name of the dealer in the mandatory **Dealer** field. Select them from the drop-down menu when they appear.

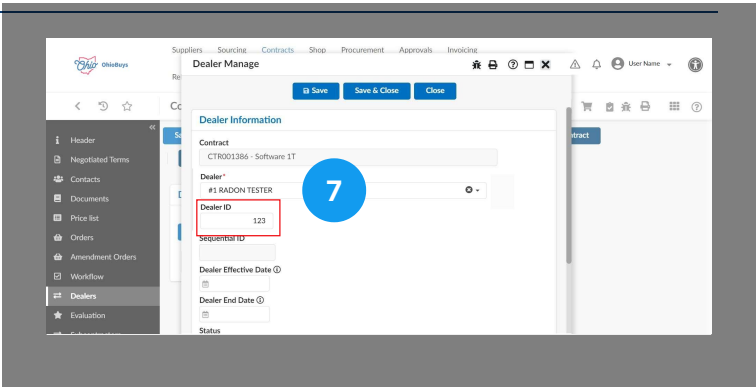
Dealer*



Select Dealer ID

7. Complete the **Dealer ID** field as appropriate.

Dealer ID

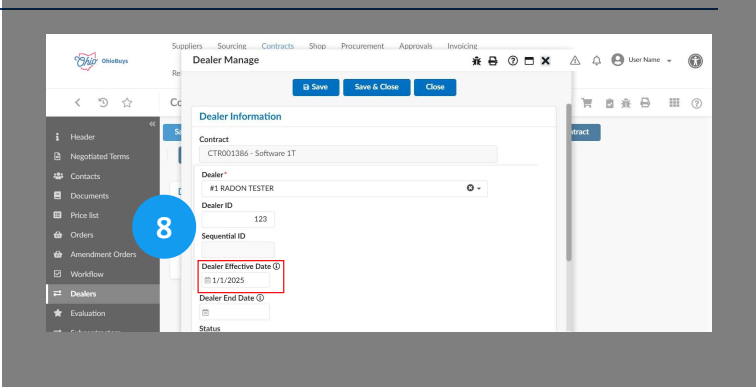
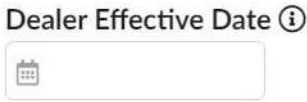


Note

- The Dealer ID will be appended to the end of the contract number (e.g. "-1") to create the dealer's contract record in OAKS and referenced on the purchase order line (when applicable). This field is not automatically populated.

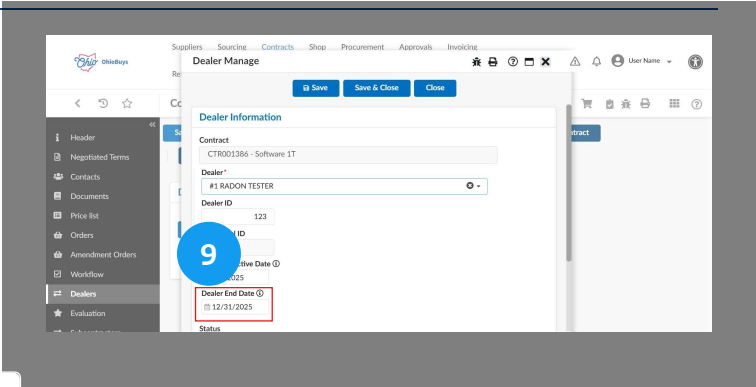
Dealer Effective Date

8. Update the Dealer Effective Date as appropriate.



Select End Date

9. Update the Dealer End Date as appropriate.

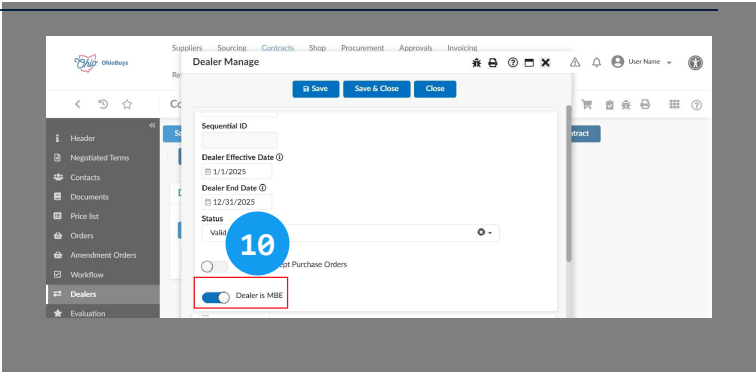
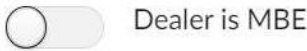


▲ Note

- For MBE dealers, the OAKS contract interface will fail if the contract's dates are outside the date range of the dealer's MBE validity dates. For example, if a dealer's MBE certification became effective after the contract effective date, insert the effective date of their MBE certification in the Dealer Effective Date field - this will be interfaced to OAKS as the effective date of the dealer's contract record.

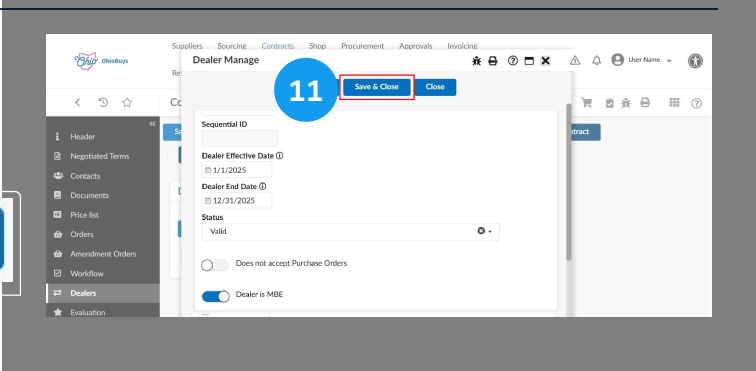
Indicate if Dealer is MBE

10. Click the slider to indicate if the Dealer is MBE, if necessary.



Click Save & Close

11. Click **Save & Close**. If you need to add another dealer, click Add Dealer and repeat the pervious steps as necessary.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.

Ohio OhioBuys Adding Subcontractors

Updated: 09/26/2025 12:54 PM

Version: 6.0

1 Purpose & Profiles

This job aid covers the process of creating a contract record within OhioBuys.

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

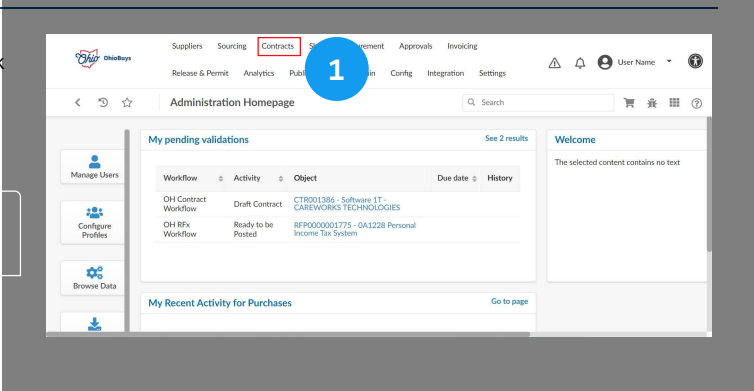
2 Used When

Reference this when a contract record is created in OhioBuys and subcontractors will need to be listed on the contract.

Click Contracts

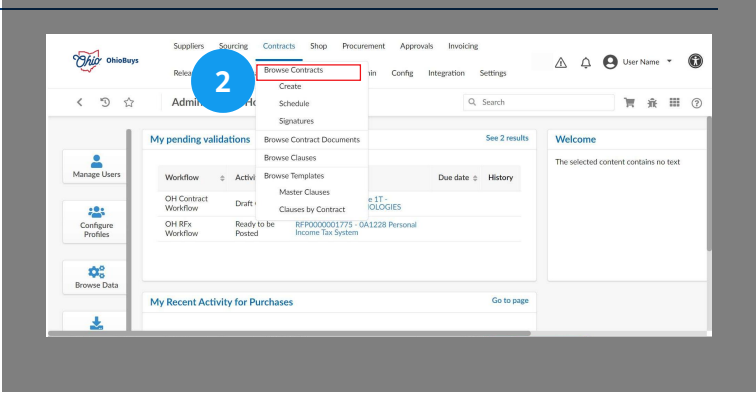
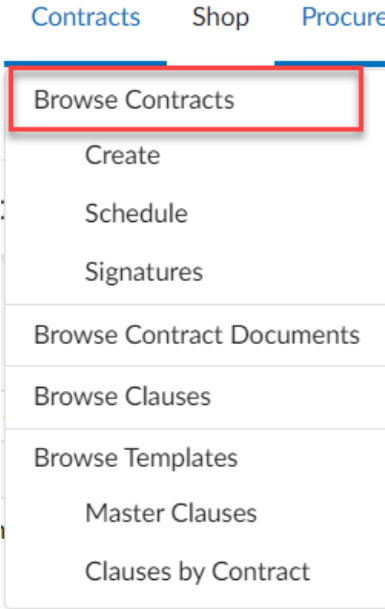
1. Log in to OhioBuys. From the Main Menu Navigation Bar, click **Contracts**.

Contracts



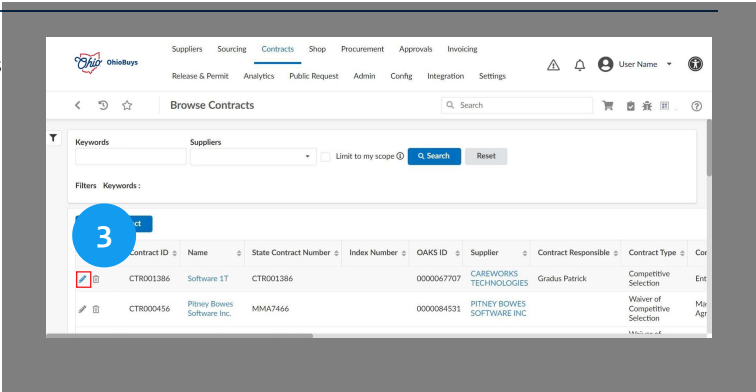
Click Browse Contracts

2. Select **Browse Contracts** from the drop-down menu.



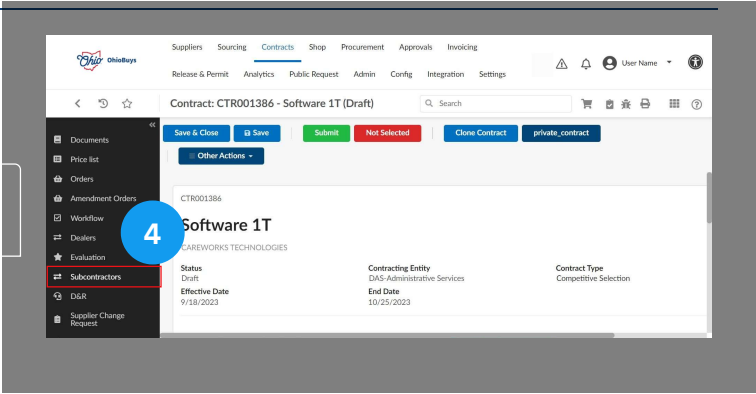
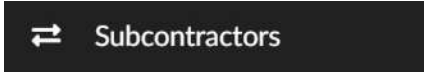
Click the Pencil icon

3. Locate the contract you would like to edit using the Keywords search. Once you have located the contract you would like to edit, click the **Pencil icon** to open it.



Click Subcontractors

4. Navigate to the **Subcontractors** tab.



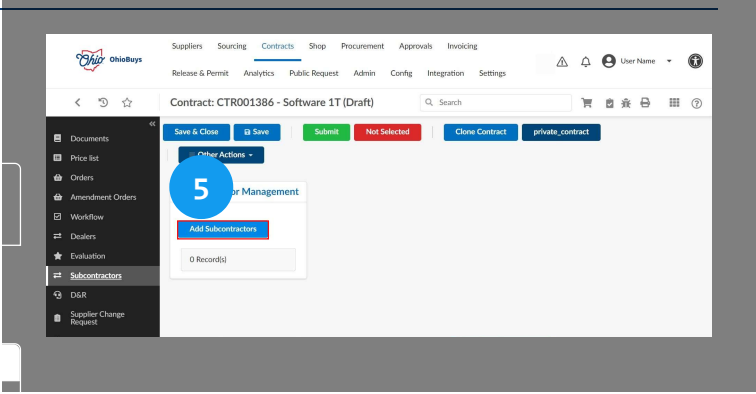
Click Add Subcontractors

5. Click **Add Subcontractors**.



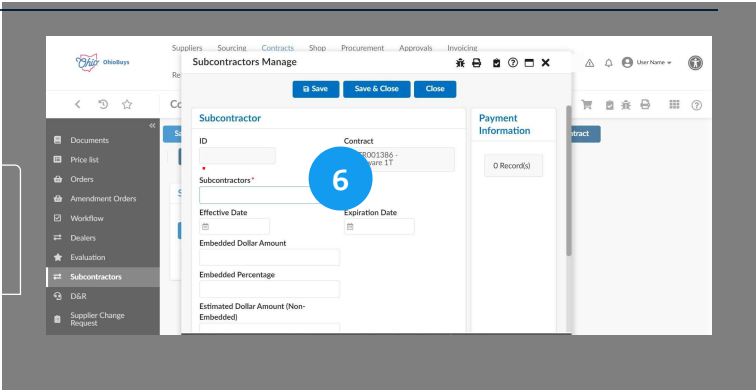
Note

Subcontractors are companies that have been contracted to perform a portion of the work within the contract. These entities will be selected by the primary Supplier on the contract.



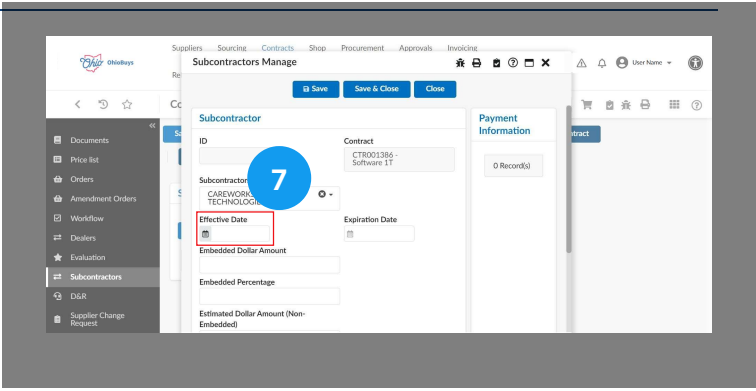
Enter Subcontractor

6. Enter the name of the **Subcontractors**.



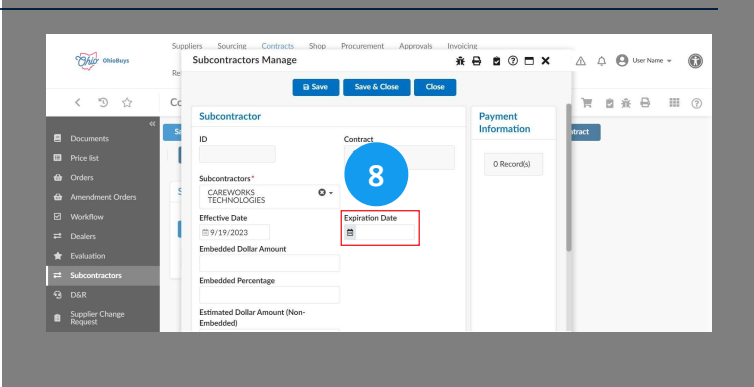
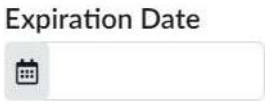
Enter Effective Date

7. Click the calendar icon to enter the **Effective Date**.



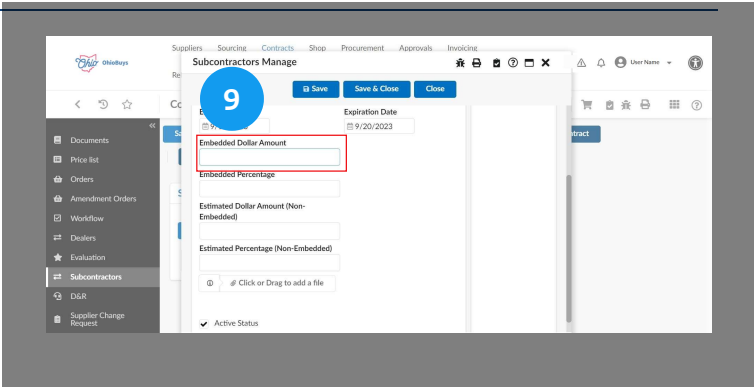
Enter Expiration Date

8. Click the calendar icon to enter the **Expiration Date**.



Enter Embedded Dollar Amount

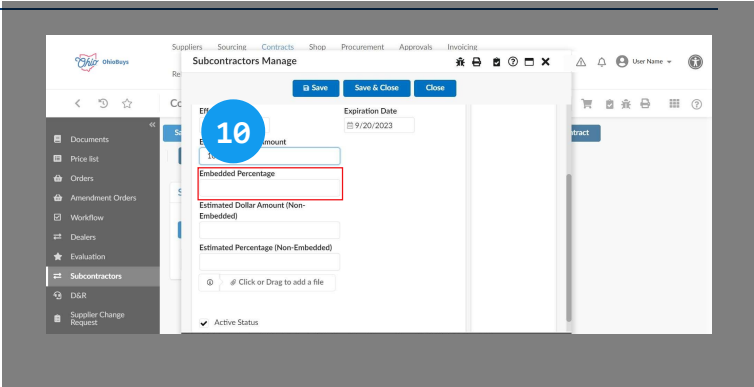
9. Enter the **Embedded Dollar Amount** if appropriate.



Note
Embedded Dollar Amount applies to competitive contracts only.

Enter Embedded Percentage

10. Enter the **Embedded Percentage** if appropriate.

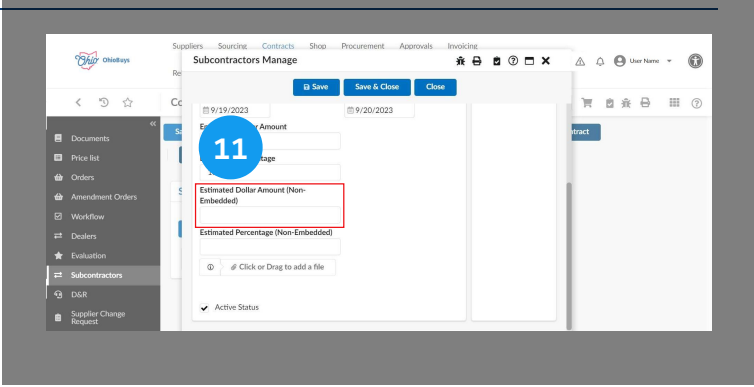


Note
Embedded Dollar Percentage applies to competitive contracts only.

Enter Non-Embedded Dollar Amount

11. Enter the **Estimated Dollar Amount (Non-Embedded)** as required. If not required, leave this field blank.

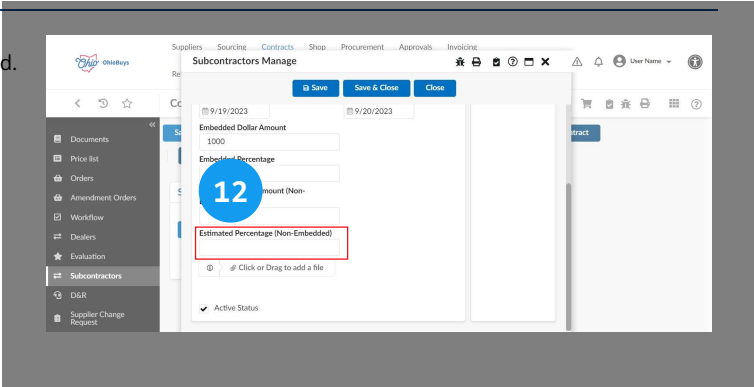
Estimated Dollar Amount (Non-Embedded)



Enter Non-Embedded Percentage

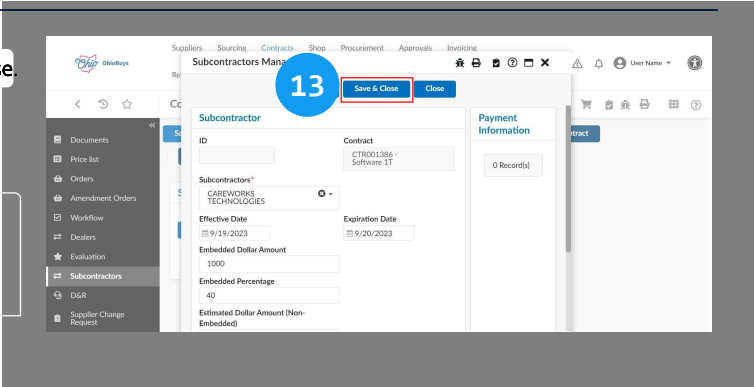
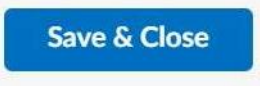
12. Enter the **Estimated Percentage (Non-Embedded)** as required. If not required, leave this field blank.

Estimated Percentage (Non-Embedded)



Click Save & Close

13. After completing adding the subcontractor, click **Save & Close**. Repeat this process to add any additional subcontractors.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuy: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys Contract Authoring (MS Word)

Updated: 10/07/2025 04:24 PM

Version: 10.0

1 Purpose & Profiles

This job aid covers the process of authoring a contract directly in OhioBuys using Microsoft (MS) Word Authoring.

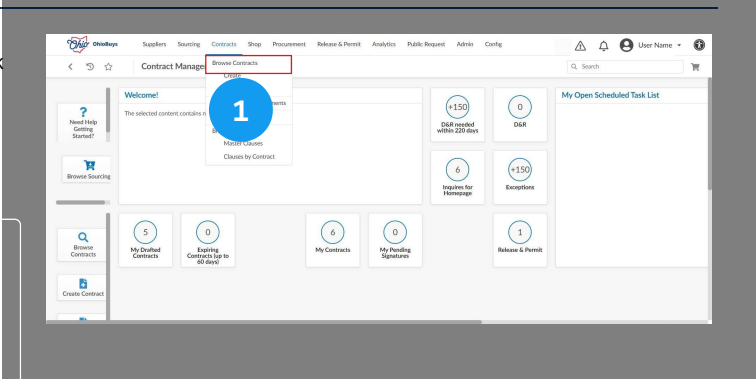
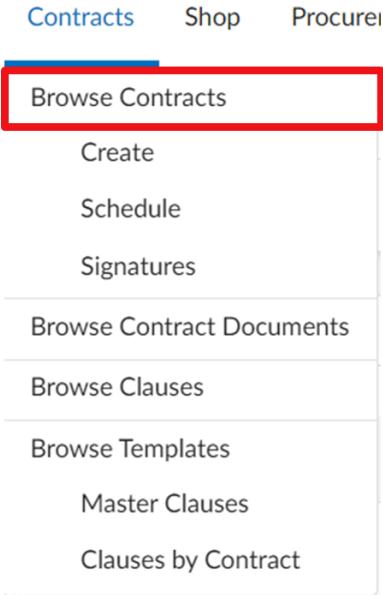
Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, Procurement Manager, Agency Sourcing Associate

Used When

Reference this when authoring a contract using Microsoft Word.

Navigate to Contracts

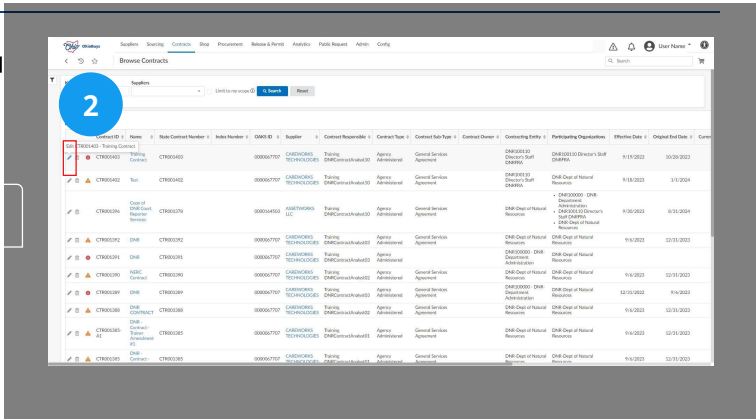
1. Log in to OhioBuys. From the Main Menu Navigation bar, click **Contracts** and then select **Browse Contracts** from the drop-down menu.



Open Contract

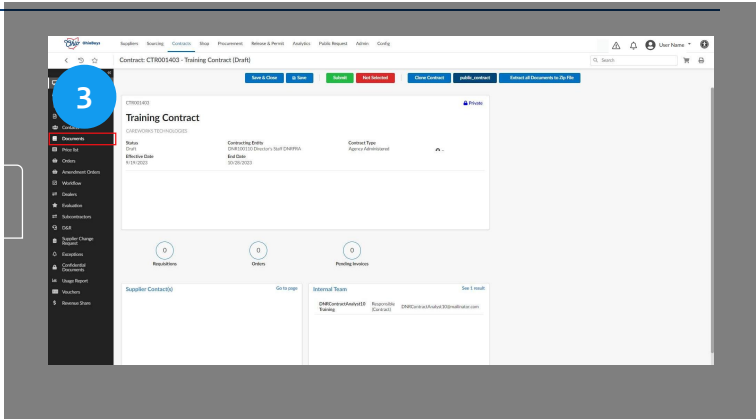
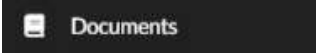
2. Open the contract you would like to edit by clicking the **Pencil** icon.

Pencil Icon: 



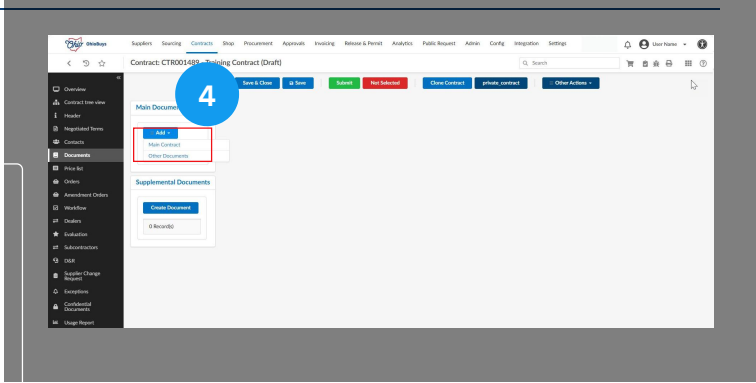
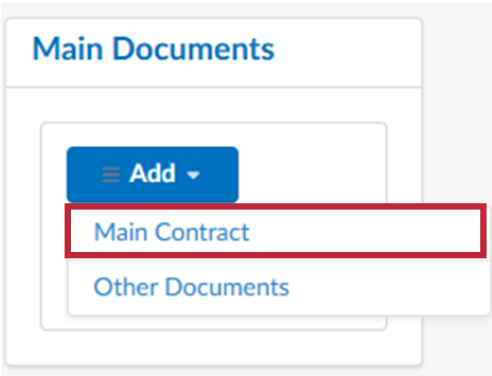
Navigate to Documents

3. Navigate to the **Documents** tab.



Add a Contract Document

4. Under **Main Documents**, click **Add** and select **Main Contract**.

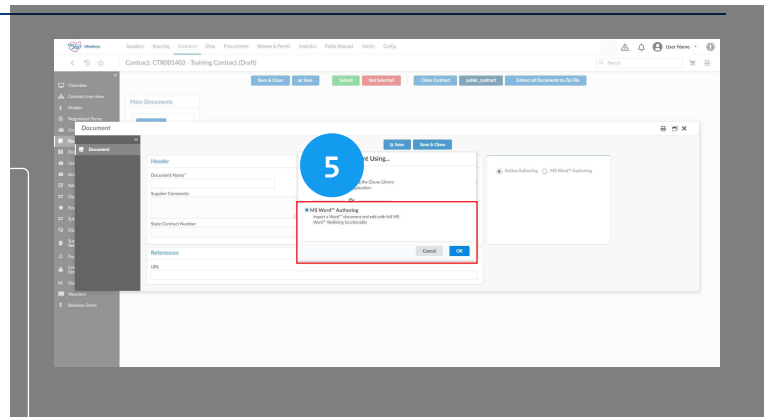
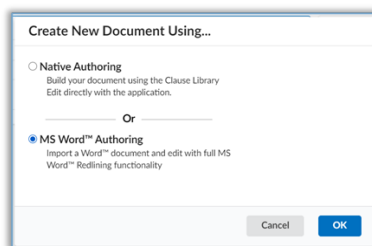


Users should upload a Main Contract document when they would like to utilize the contract authoring functionality and/or the contract document approval workflow that is independent of the larger contract workflow. With this workflow, users can assign up to 4 layers of document approvers, which can each contain multiple users, as well as a Legal Approver on the Contacts tab of the contract record. Users assigned as approvers will be notified via email whenever there is a contract document that requires their review. Approvers will be able to open and edit the contract document as needed as well as add comments. Any comments or updates made by approvers will be tracked in the contract document for subsequent approvers.

Users can also upload Other Documents in the Main Documents section of Documents tab. These documents do not go through an approval workflow.

Create a Contract Document with MS Word Authoring

5. Select **MS Word Authoring** and click **OK**.



▲ Note

Only the user(s) listed as Responsible on the contract team will have the ability to add Main Documents. All other team members will have the ability to edit the documents after they have been added.

▲ Note

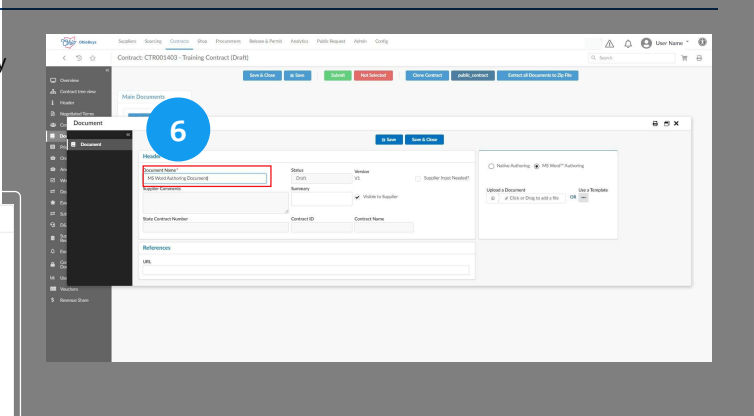
In order for a user to participate in the contract authoring process, they must be assigned the **Contract Authoring** profile.

Complete the Contract Document Header

6. Complete the mandatory **Document Name** field as well as any additional fields (e.g. **Summary**).

Header

Document Name* MS Word Authoring Document	Status Approval in Progress	Version V1	<input type="checkbox"/> Supplier Input Needed?
Supplier Comments	Summary	<input type="checkbox"/> Visible to Supplier	
State Contract Number CTR001403	Contract ID CTR001403	Contract Name Training Contract	

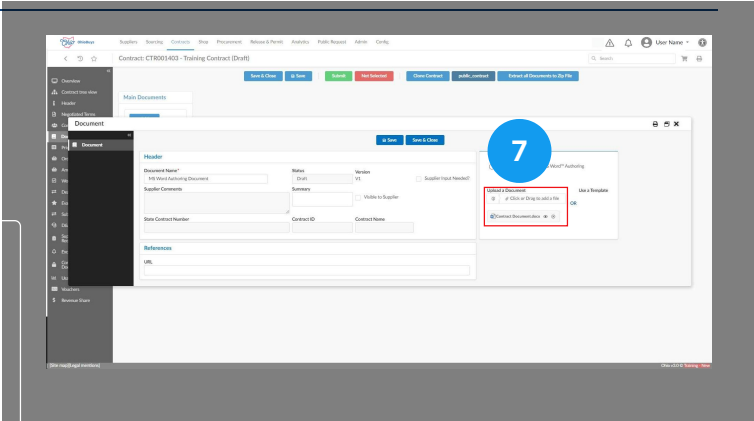
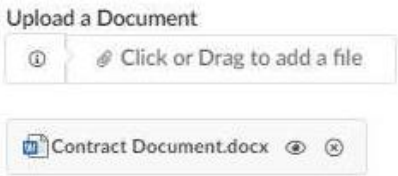


Note

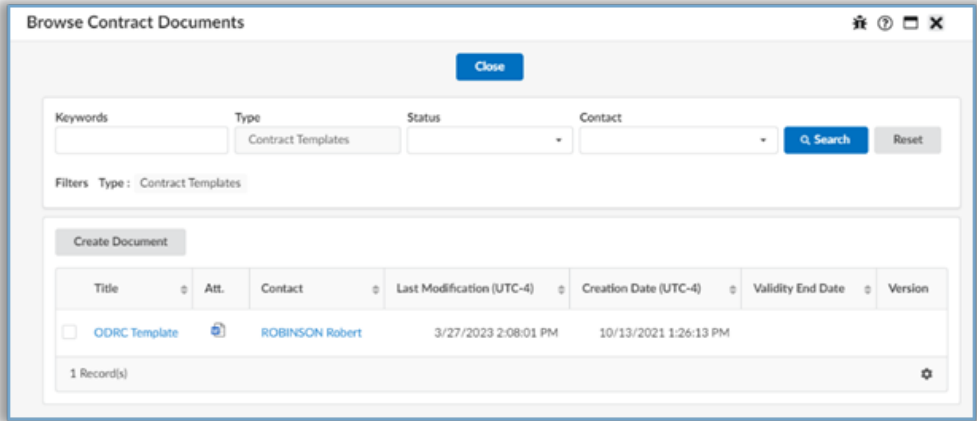
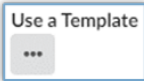
The Visible to Supplier field will default as selected. If the Supplier will be involved in editing or redlining the document, the **Visible to Supplier** and **Supplier Input Needed?** checkboxes must both be populated.

Upload the Contract Word Document

7. Click the **Click or Drag to add a file** hyperlink to upload the word document for the contract if necessary. The uploaded document will be displayed underneath the link.

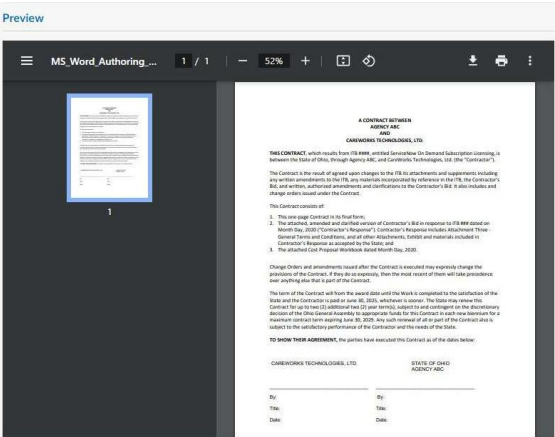
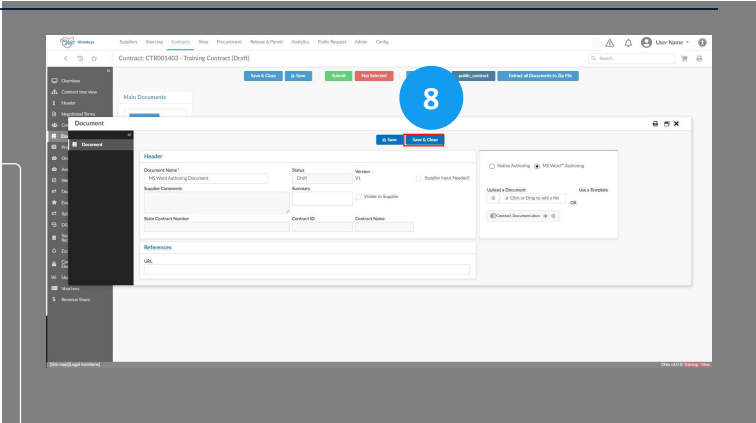


A template can also be utilized for the contract document. Click **Use a Template** then check the box of the template you would like to use and click **Save**.



Load the Contract Document

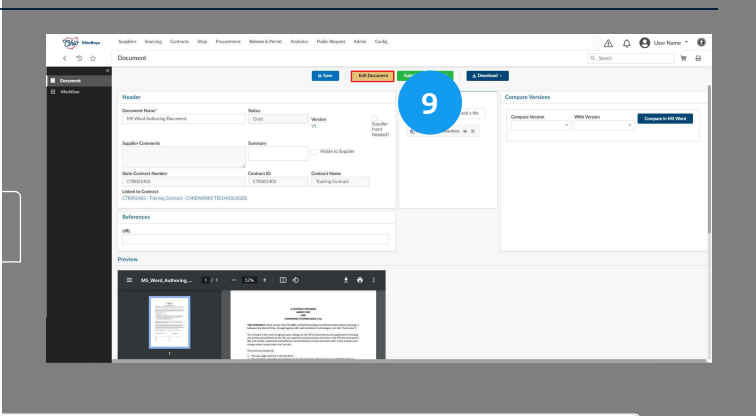
8. Click **Save & Close** to load the uploaded contract document.



Edit the Contract Document in MS Word

9. To further edit the document, click **Edit Document**. The contract will open in Microsoft (MS) Word.

Edit Document



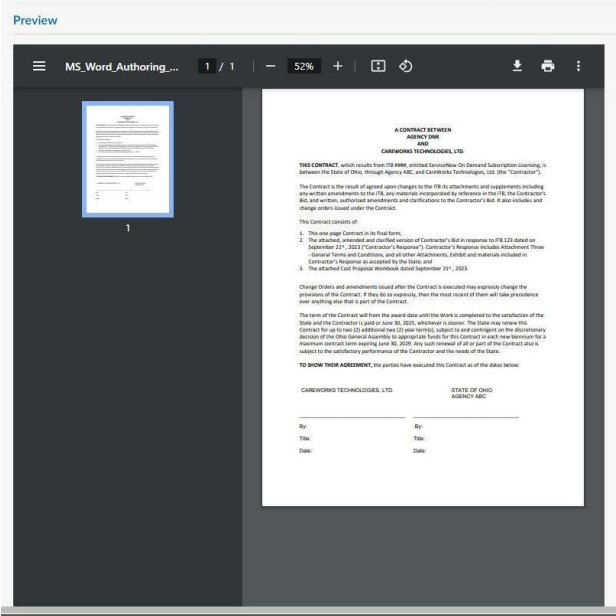
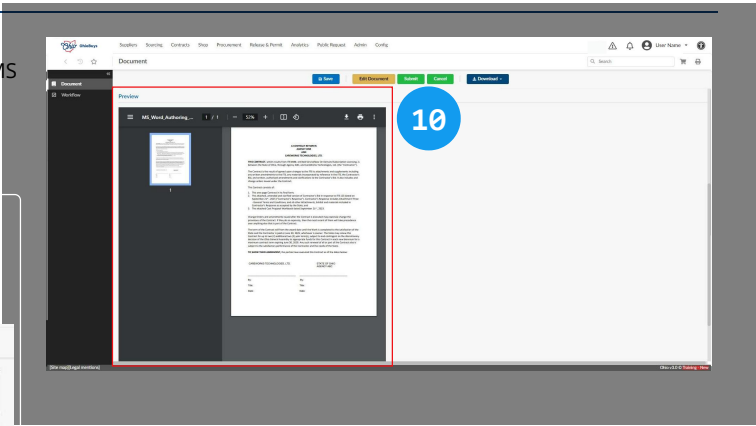
Note

Microsoft (MS) Word must already be installed on the user's computer in order to edit the contract. In addition, it is highly recommended to turn Track Changes in MS Word on before making edits.

Complete MS Word Authoring

10. When finished editing the document, click the **Save** icon in MS Word. Then close Word.

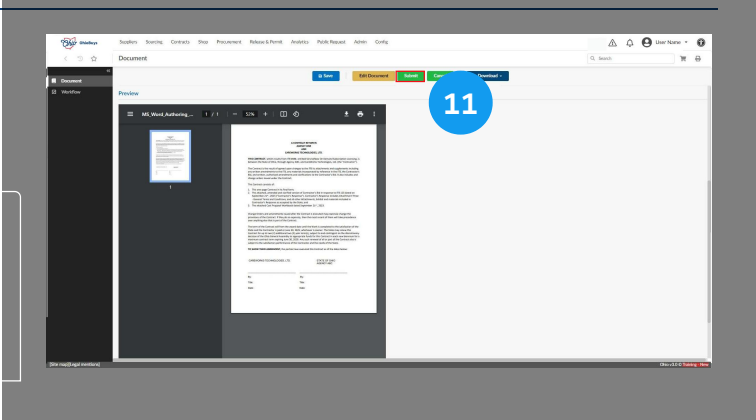
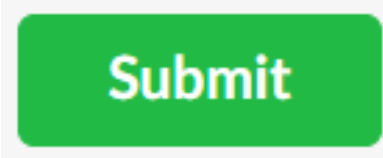
Save icon: 



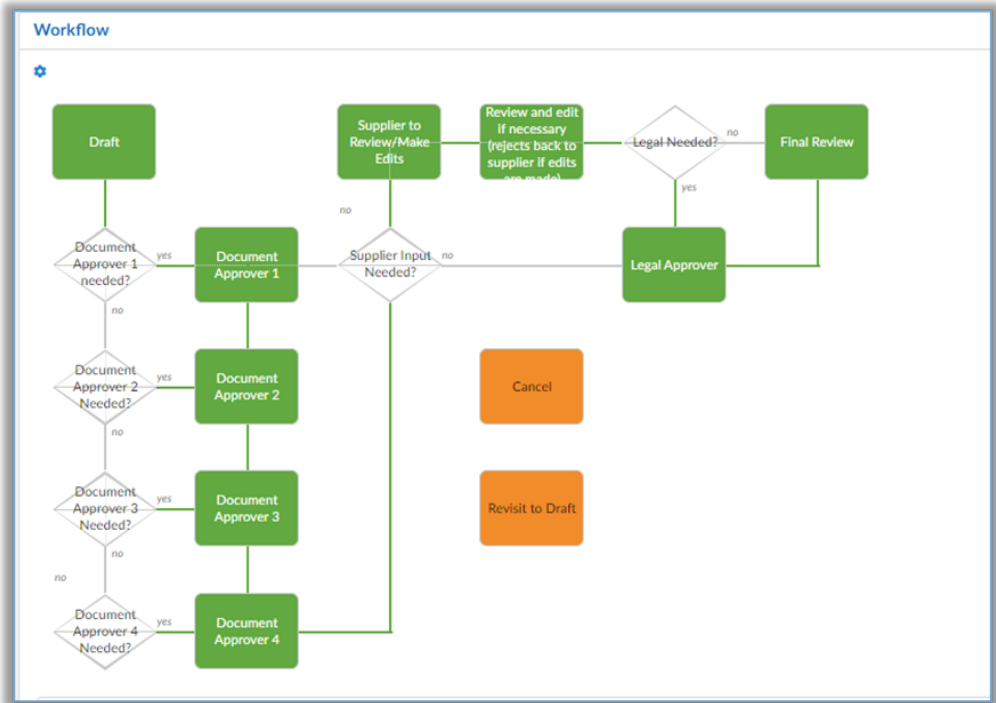
The Contract Document preview will showcase the updated changes that were made in MS Word.

Submit the Contract Document for Approval

11. Click **Submit** to enter the document into the Contract Document Workflow.



Contract Documents added using Main Contract Document will have a contract document approval workflow that is separate from the contract record approval workflow.



After submission, the contract document will be routed to any team members that have been assigned the Contract Document Approver role. Up to 4 persons can be given this role, and they each must approve or reject the contract document.

If the Supplier Input Needed box is checked, the contract document will then go to the Supplier for review/redlining. The contract document will turn back to the user(s) responsible for the contract for any additional review of Supplier edits (the document will go back to the Supplier if edits are made after Supplier Review).

Next, the contract document will be routed to any Legal (Contract Document) users. After approval, it will be routed back to the user(s) responsible for the contract for final review and submission.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



1 Purpose & Profiles

This job aid covers reviewing a (MS Word) Contract Document as an approver.

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 reviewing a contract document as an approver that has been authored using Microsoft Word.

▲ Note

Contract Document Approvers, Legal (Contract Document), and Suppliers will receive an email notification whenever they are requested to review and redline a contract document in OhioBuys.

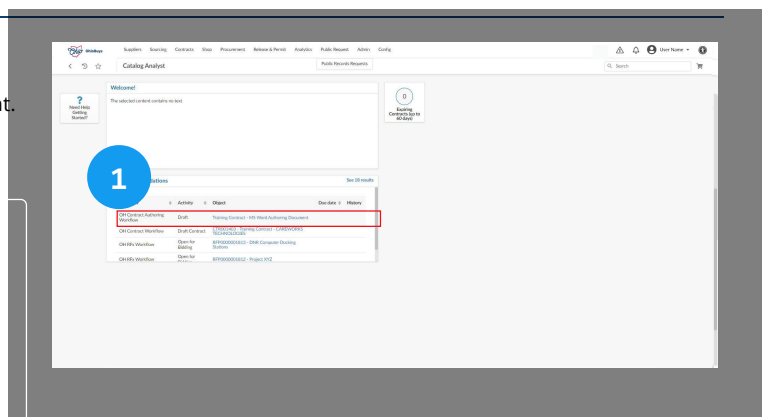
Before the contract document is submitted, these roles must be assigned to members of the contract team.

If the Supplier will be involved in editing or redlining the document, the **Visible to Supplier** and **Supplier Input Needed?** checkboxes must both be populated

Navigate to My Pending Validations

1. Log in to OhioBuys. From the **My Pending Validations** pane, click on the **Object** hyperlink to take you to the contract document.

Workflow	Activity	Object	Due date	History
OH Contract Authoring Workflow	Draft	Training Contract - MS Word Authoring Document		
OH Contract Workflow	Draft Contract	CTR001403 - Training Contract - CAREWORKS TECHNOLOGIES		
OH RFx Workflow	Open for Bidding	RFPO000001813 - DNR Computer Docking Stations		

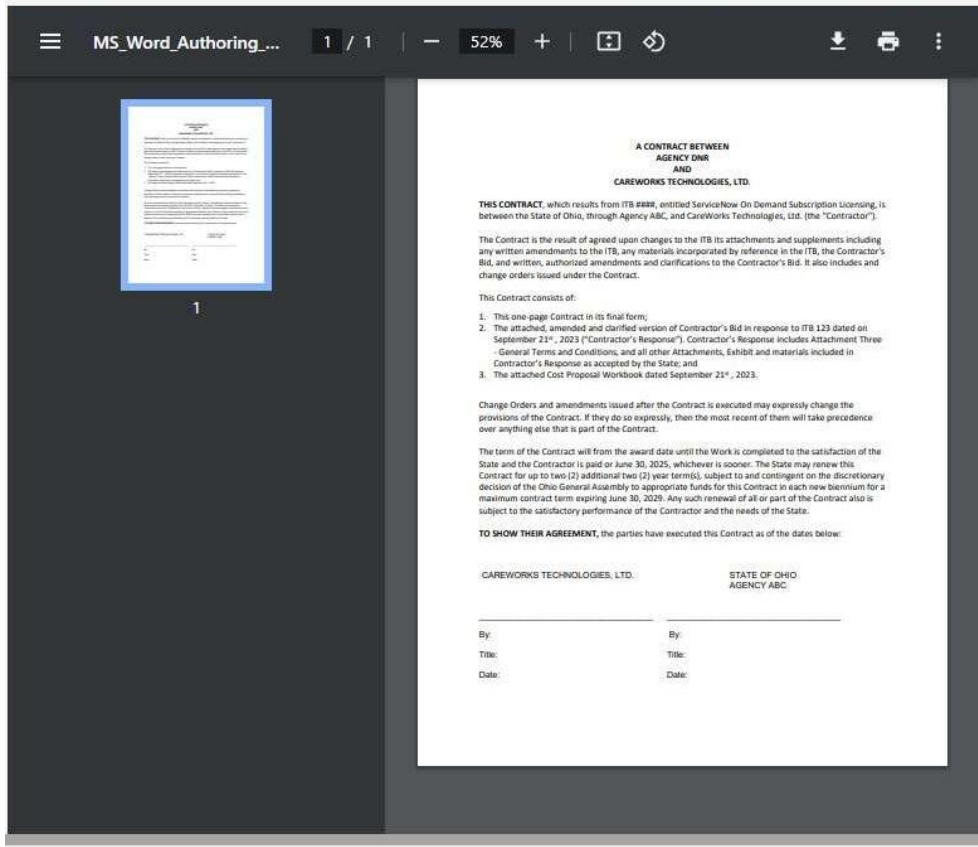
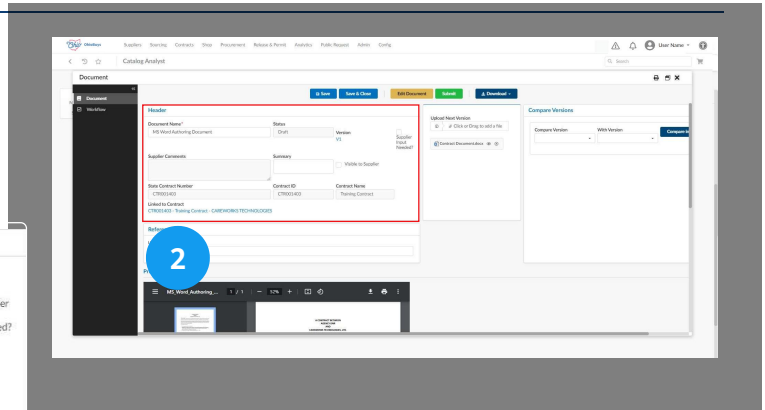


Update Contract Document Details

2. Review the details of the contract document **Header**. Update any information as necessary. Users can review a preview of the contract document directly within OhioBuys.

Header

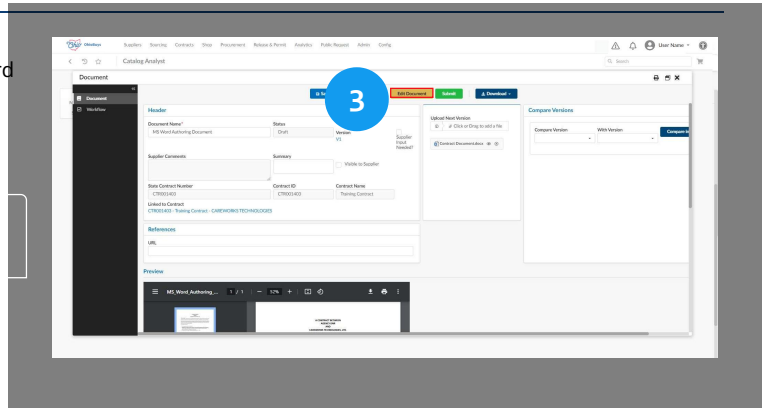
Document Name*	Status	Version	
MS Word Authoring Document	Draft	V1	<input type="checkbox"/> Supplier Input Needed?
Supplier Comments	Summary	<input type="checkbox"/> Visible to Supplier	
State Contract Number	Contract ID	Contract Name	
CTR001403	CTR001403	Training Contract	
Linked to Contract			
CTR001403 - Training Contract - CAREWORKS TECHNOLOGIES			



Update Contract Document in MS Word

3. Click **Edit Document** to open the document in Microsoft Word and make changes to the contract document.

Edit Document



▲ Note

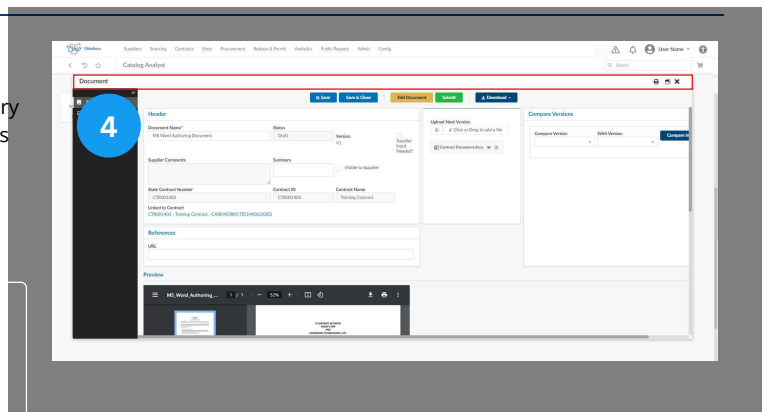
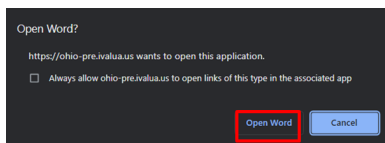
If you do not see the Edit Document button, the contract document has been authored directly within OhioBuys. Refer to Review and Redline a Natively Authored Contract Document for instructions on how to review a natively authored contract document.

Reference the Following Document(s):

[Review and Redline a Natively Authored Contract Document](#)

Save the Contract Document

4. Click **Open Word** to allow your computer to open the document. Review the contract document and make any necessary updates and comments. The document will be locked in OhioBuys until finished. When finished click the **Save** icon in MS Word, and close the document to have your updates sync with OhioBuys.



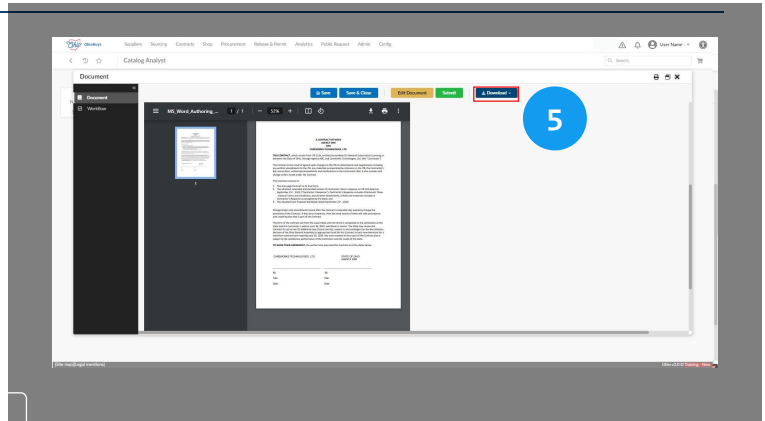
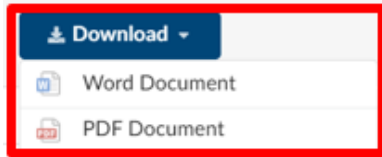
Save icon: 

▲ Note

By default, all contract documents from OhioBuys redlined in Microsoft Word will have **Track Changes** enabled. Updates made to the documents in Word will be traceable using the MS Word user interface.

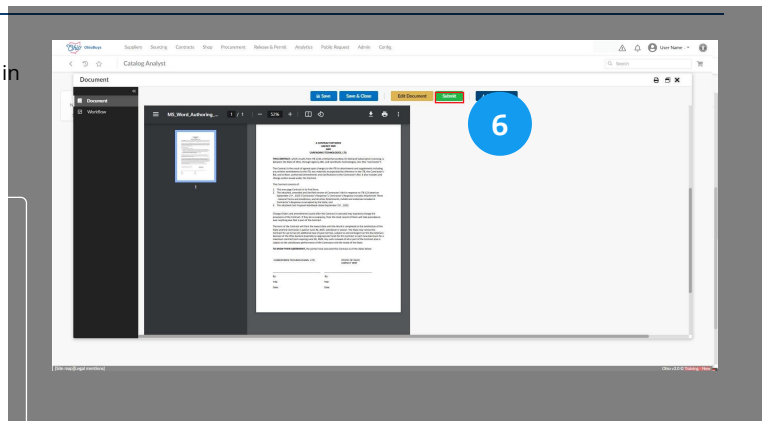
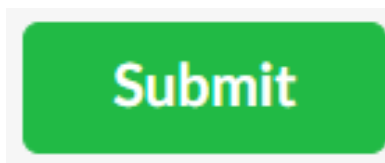
Download the Contract Document

5. The updates to the contract document have been saved to OhioBuys. Click **Download** and then select if you would like to download a **Word Document** or a **PDF Document**.



Submit the Updated Contract Document

6. Click **Submit** to send the contract document to the next step in the workflow.



▲ Note

If the Supplier Input Needed? checkbox has been selected, they will get to review and redline the contract after the contract document approvers. After Supplier Review, the contract document will go back to the user(s) responsible for the contract. If the user(s) responsible for the contract makes more edits then it will go back to the Supplier. This process will repeat until the contract responsible submits without making anymore Supplier edits.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.

Ohio OhioBuys Contract Authoring (Native Authoring)

Updated: 10/07/2025 04:21 PM

Version: 8.0

Purpose & Profiles

This job aid covers the process for creating a new contract document in OhioBuys using Native Authoring.

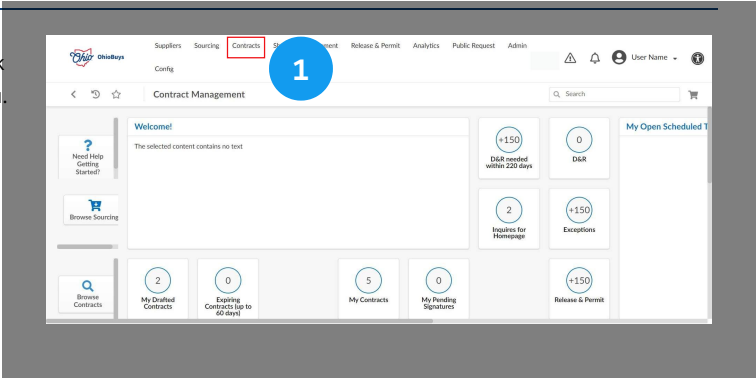
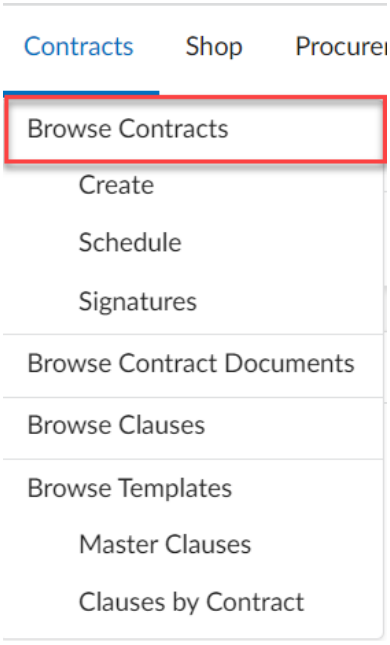
Profiles: Contract Analyst, Procurement Manager, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, Agency Procurement Manager

Used When

Reference this when creating a new contract document using Native Authoring.

Browse Contracts

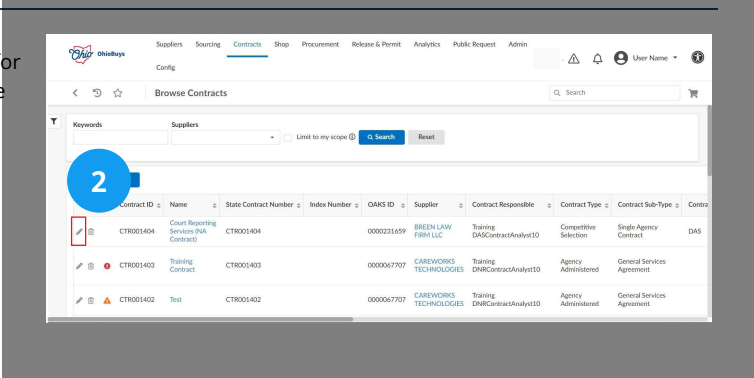
1. Log in to OhioBuys. From the Main Menu Navigation Bar, click **Contracts** and select **Browse Contracts** from the drop-down menu.



Open the Contract

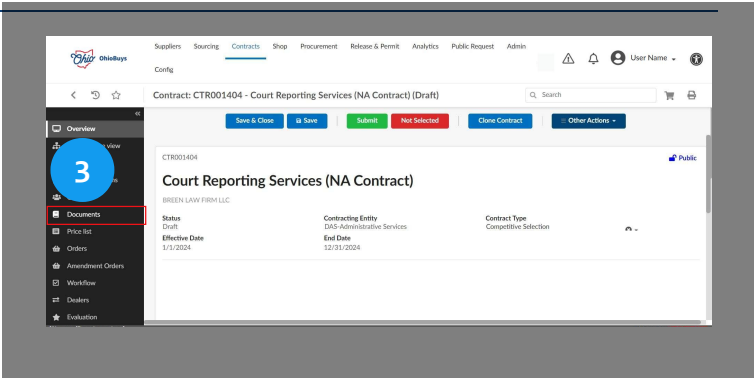
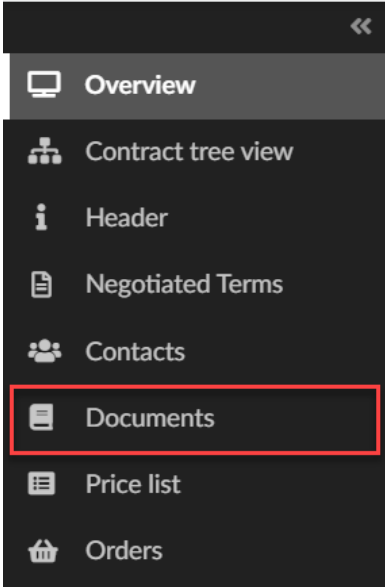
2. Search for the contract you would like to create a document for using the Keywords Search, or the available filters. When you have located the contract you want to open, click the **Pencil** icon.

Pencil Icon: 



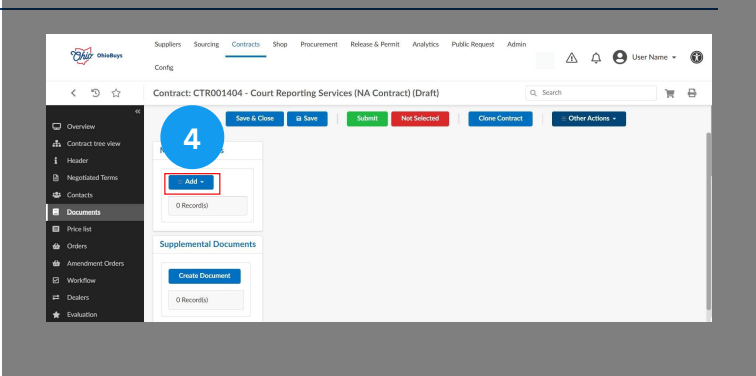
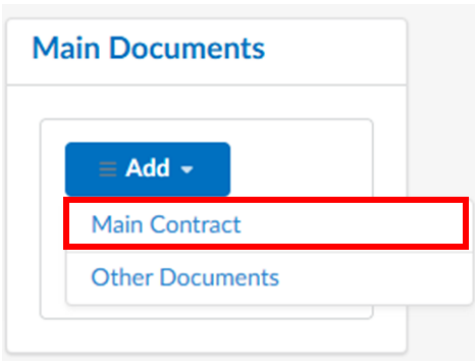
Documents Tab

3. Navigate to the **Documents** tab.



Select Main Contract

4. Under Main Documents, click **Add** and select **Main Contract**.



▲ Note

Only the user(s) listed as Responsible on the contract team will have the ability to add Main Documents. All other team members will have the ability to edit the documents after they have been added.

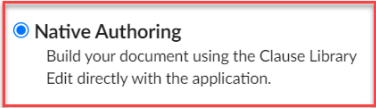
▲ Note

In order for a user to participate in the contract authoring process, they must be assigned the **Contract Authoring** profile.

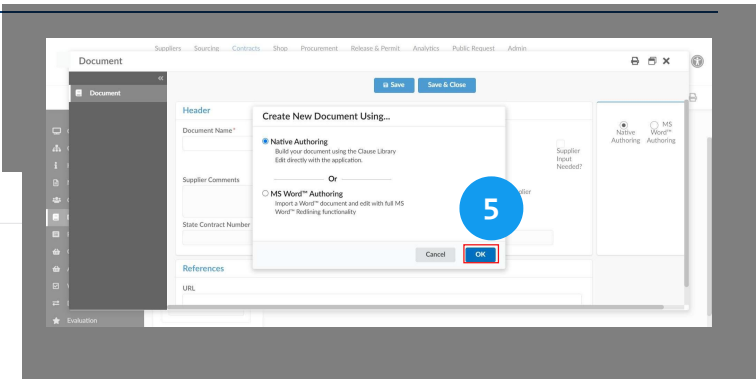
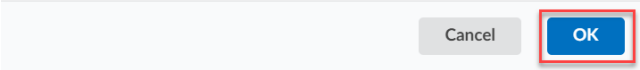
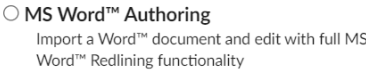
Native Authoring

5. Select **Native Authoring** and click **OK**.

Create New Document Using...



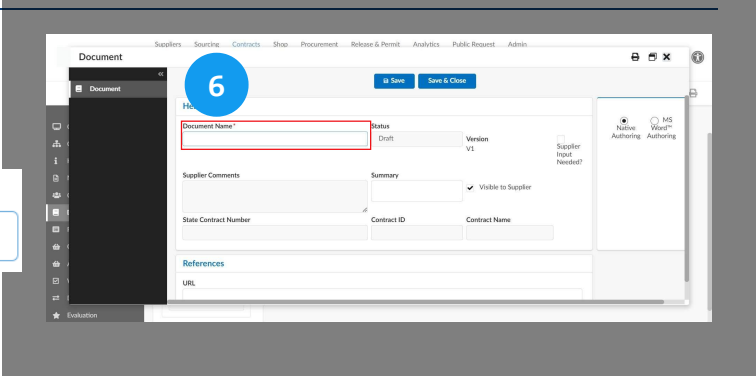
Or



Document Name

6. Input the Document Name.

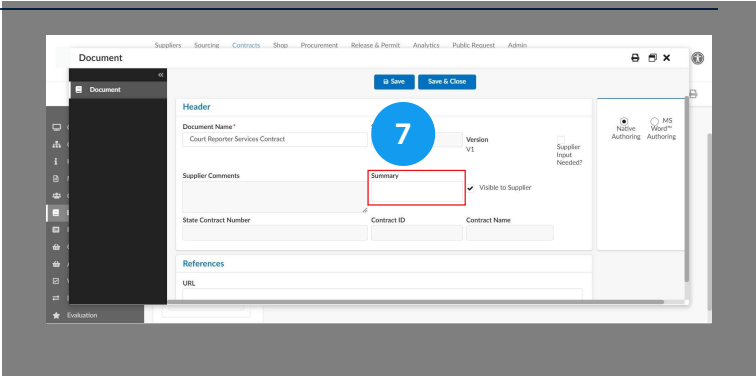
Document Name*



Summary

7. Users can optionally provide a Summary to describe the contents of the document.

Summary



▲ Note

Users can optionally indicate whether the document should be Visible to Supplier(s) or whether Supplier Input is Needed by using the associated checkboxes.

Version
V1

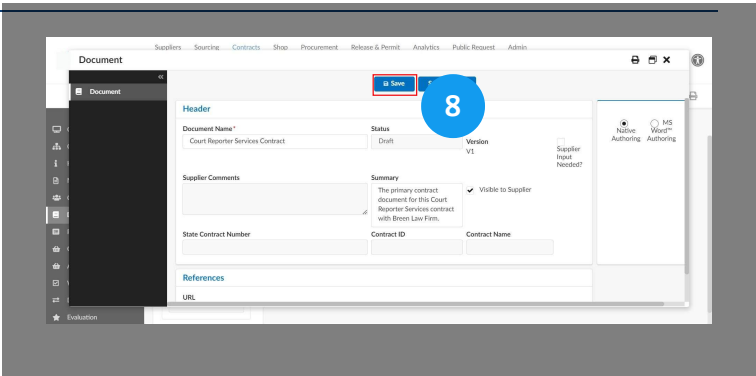
Supplier Input Needed?

Visible to Supplier

Note that if the Supplier will be involved in editing or redlining the contract document, both of these checkboxes must be populated.

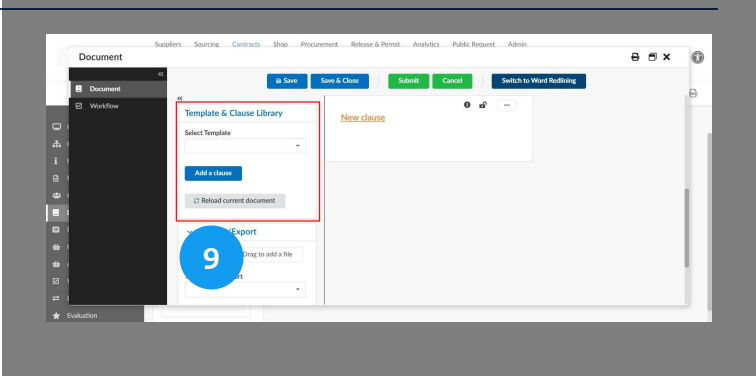
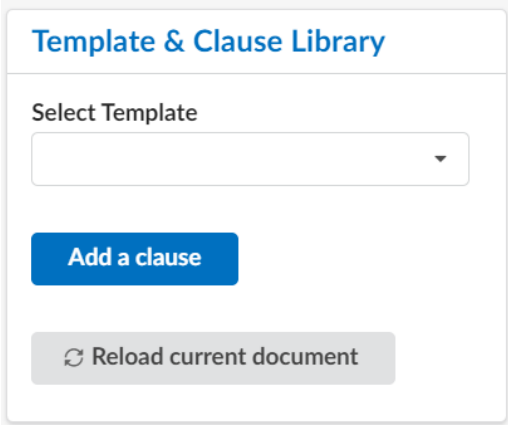
Save

8. Click Save.



Importing Templates and Clauses

9. Scroll down and optionally use the **Template and Clause Library** to insert preconfigured **Contract Templates** and **Master Clauses**.

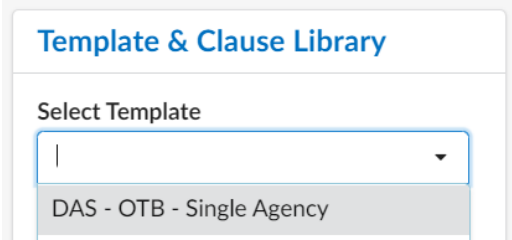


Template and Clause Library

Users can optionally leverage the Template and Clause Library when creating a contract with Native Authoring. From the library, users can insert **Contract Templates** and **Master Clauses**.


- **Master Clauses:** Preconfigured contract clauses with common language used by the state when drafting contracts (e.g., a General Provisions clause)
- **Contract Templates:** Collections of Master Clauses organized and ordered into a draft contract agreement

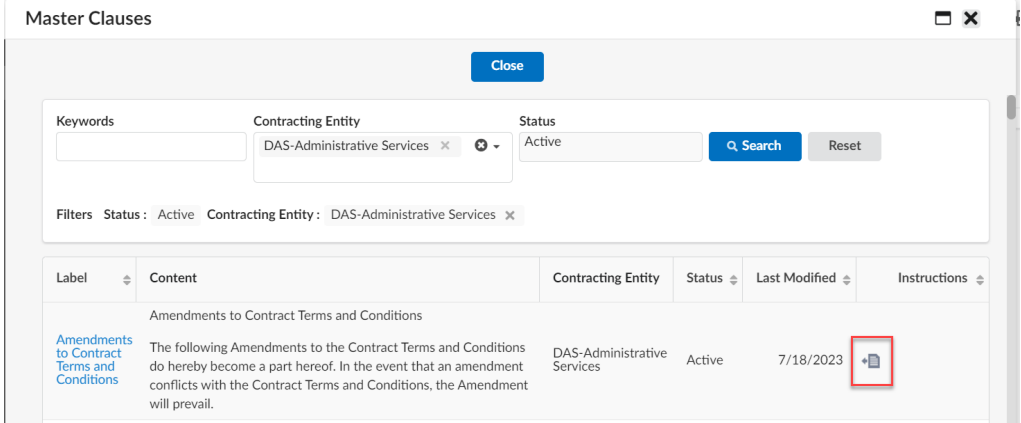
To insert a template, click on the **Select Template** field and select an option from the drop-down menu.



To insert a Master Clause, click on the **Add a Clause** button.

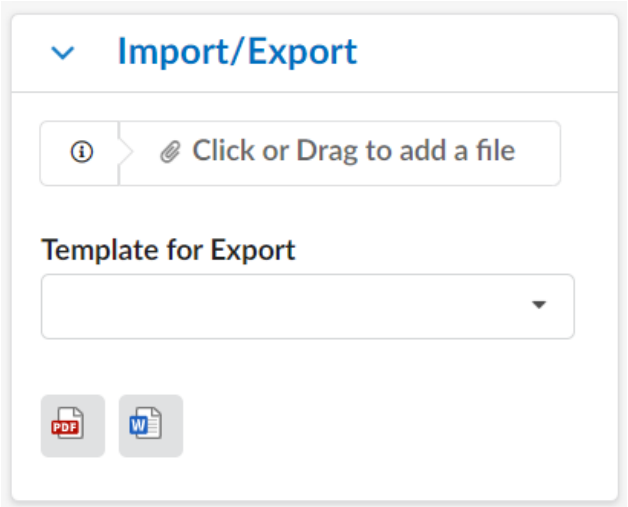


Use the **Keywords** field to search for a clause name, then click the Insert () icon next to it. Then click the X icon to close the pop-up window.



▲ Note

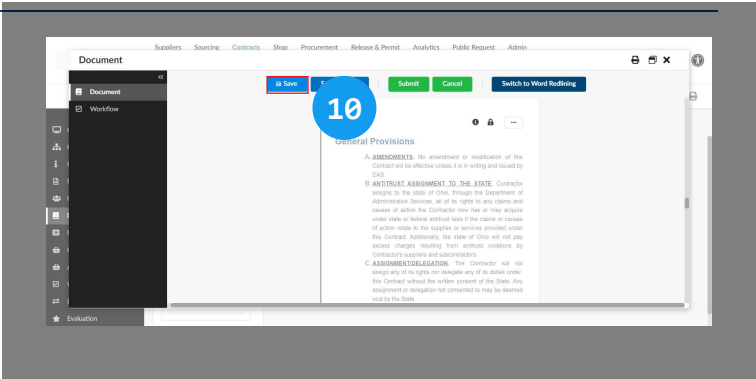
In addition to importing templates and clauses using the OhioBuys Template and Clause Library, users can optionally import Contract Templates using a PDF or Word file.



In addition, the current template constructed in OhioBuys can also be exported as a PDF or Word file by clicking the associated icon(s).

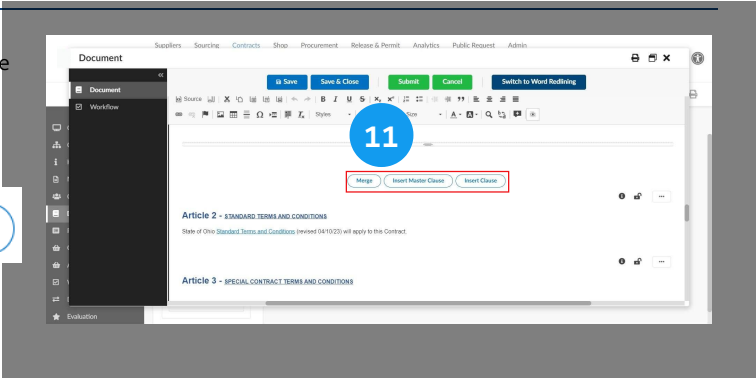
Save

10. After adding in any Contract Templates and/or Master Clauses, click **Save**.



Managing Clauses

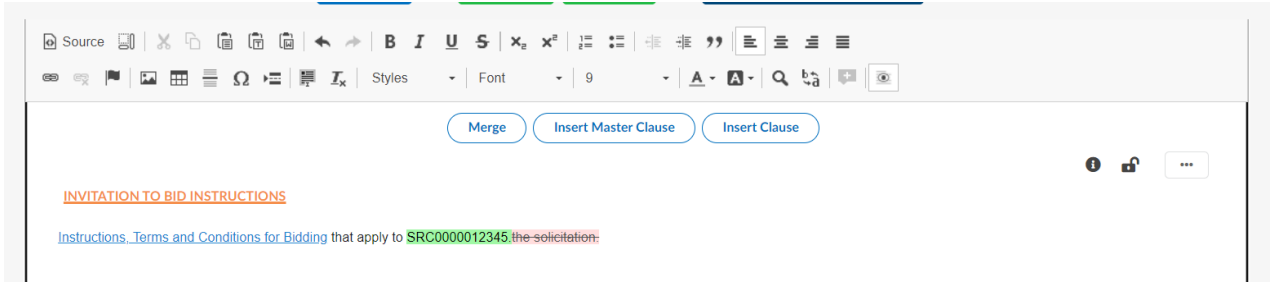
11. Users can also edit a clause by clicking on its contents, or use the action buttons that appear between clauses.



Editing and Managing Clauses

Editing a Clause

Clauses can be edited by clicking on them and typing text directly, or pasting it from another source.



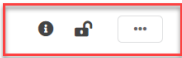
Note that contract documents created using Native Authoring will always have track changes enabled. Additions made to the contract document will be highlighted in green, and text deleted from the document will be highlighted in red, as in the image above.

Managing Clauses

New clauses can be added within a document using the action buttons that appear between clauses.




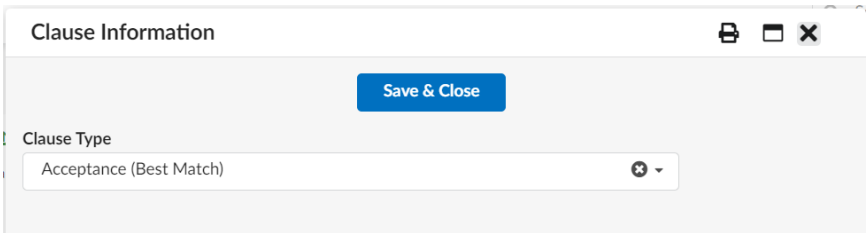
- **Merge:** Combine the clauses directly above and below where the action button is being clicked
- **Insert Master Clause:** Insert a Master Clause following the same instructions outlined in the Importing Templates and Causes section of this document
- **Insert Clause:** Insert a new blank clause





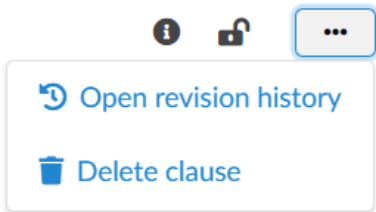
INVITATION TO BID INSTRUCTIONS
Instructions, Terms and Conditions for Bidding that apply to SRC0000012345,the solicitation:

All clauses have three actions that can be acted upon: clause information, clause lock, and clause options.

- Click on the **Clause Information** () icon to see what type of clause that OhioBuys has determined you have created. OhioBuys will do this automatically. If it is incorrect, you can click on the icon to select the correct clause type from the drop-down and click **Save & Close**.



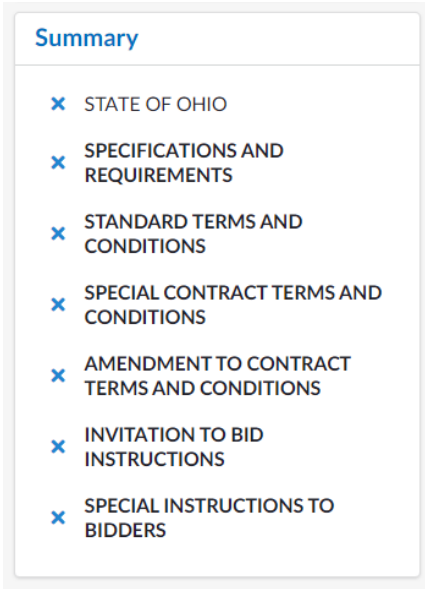
- Click on the **Clause Lock or Unlock** () icon to make a clause editable or non-editable. A locked clause cannot be edited. An unlocked clause can be edited. Note that some Master Clauses in OhioBuys are locked by default, and should not usually be edited.
- Click on the **Clause Option Ellipses** () icon to either open the revision history of the clause, or delete the clause altogether.



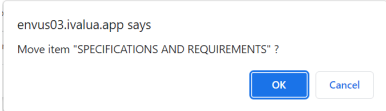
- Clicking on the **Open revision history** option allows the user to view the differences between changed clauses in the same version or compare clauses between different versions of the contract.

Clause Summary

The Summary section can be used to rearrange previously created clauses, or to delete clauses by clicking the X icon. Clicking on a clause takes you directly to that clause in the contract.

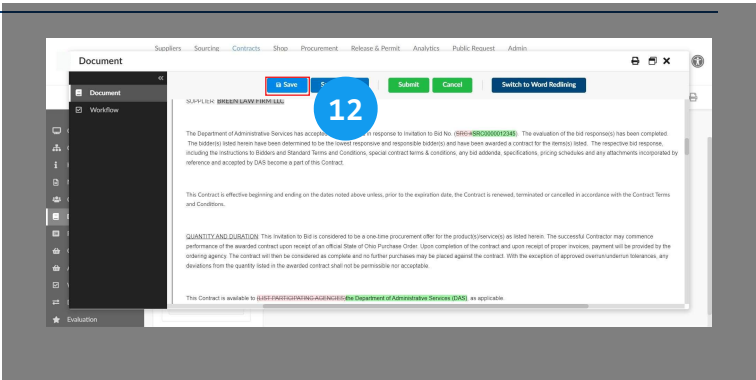


To rearrange the clauses, click on a clause and drag it to a new location in the contract order. Click **Ok** to confirm the movement.



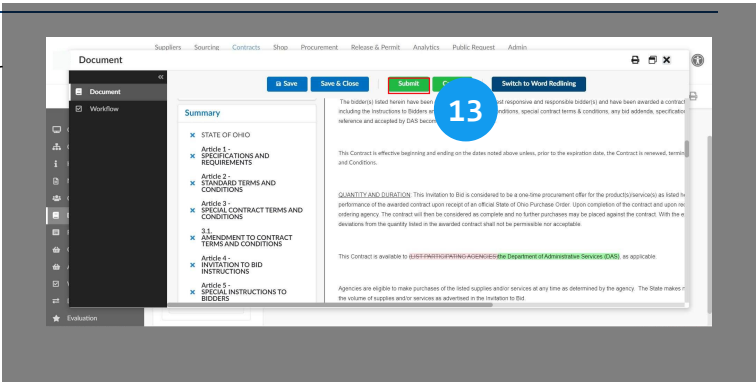
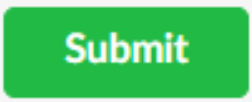
Save

12. After completing any updates to new or imported clauses, click **Save**.



Submit to the Workflow

13. After all updates have been completed, click **Submit** to enter the document into the Contract Document Workflow.



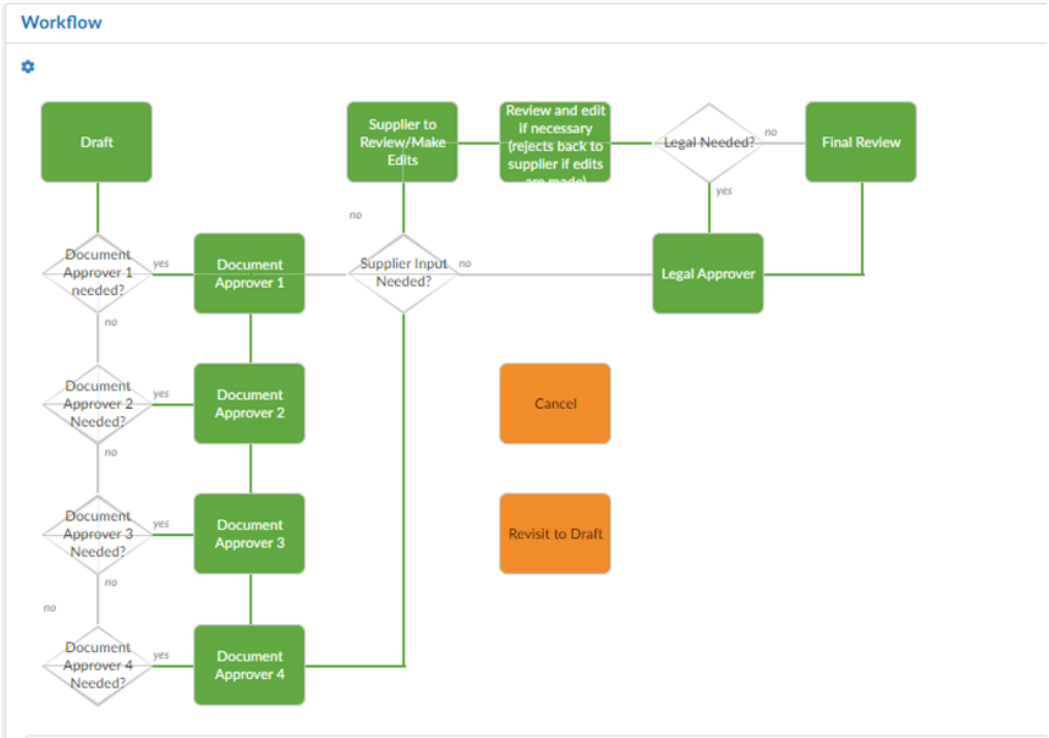
▲ Note

While using Native Authoring, users can switch to MS Word Authoring by clicking the Switch to Word Redlining button. However, once the switch has been made Native Authoring can no longer be used to author future versions of this contract document.



Contract Document Workflow

Contract Documents added using the Main Contract document type have a contract document approval workflow that is separate from the contract record approval workflow.



After submission, the contract document will be routed to any team members that have been assigned the Contract Document Approver role. Up to 4 persons can be given this role, and they each must approve or reject the contract document.

If the Supplier Input Needed box is checked, the contract document will then go to the Supplier for review/redlining. The contract document will turn back to the user(s) responsible for the contract for any additional review of Supplier edits (the document will go back to the Supplier if edits are made after Supplier Review).

Next, the contract document will be routed to any Legal (Contract Document) users. After approval, it will be routed back to the user(s) responsible for the contract for final review and submission.

To complete the steps for reviewing and approving a contract, refer to **Review a Contract**.

Review a Contract

If you are authoring a contract using MS Word Authoring, refer to **Contract Authoring (MS Word)**.

Contract Authoring (MS Word)

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



Reviewing and Redlining a Natively Authored Contract Document

Updated: 10/07/2025 04:10 PM

Version: 8.0

📌 Purpose & Profiles

This job aid covers the process for reviewing, redlining and approving a natively authored contract document in OhioBuys.

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

📖 Used When

Reference this when you have been assigned as an approver for a natively authored contract document in OhioBuys.

▲ Note

Contract Document Approvers, Legal (Contract Document), and Suppliers will receive an email notification whenever they are requested to review and redline a contract document in OhioBuys.

- Before the contract document is submitted, these roles must be assigned to members of the contract team.
- If the Supplier will be involved in editing or redlining the document, the **Visible to Supplier** and **Supplier Input Needed?** checkboxes must both be populated.

Version
V1

Supplier
Input
Needed?

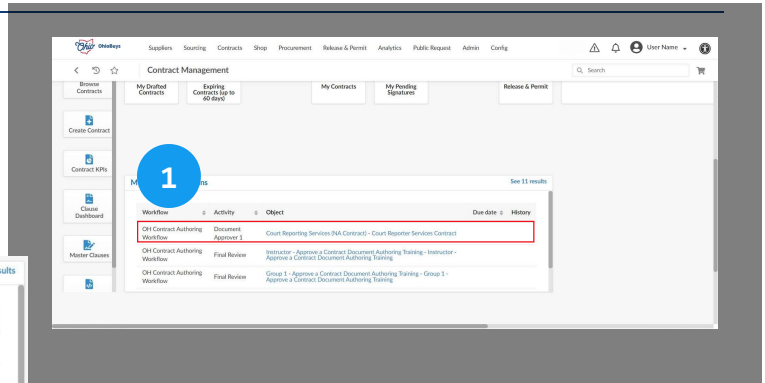
Visible to Supplier

My Pending Validations

1. Log into OhioBuys. From the homepage, scroll down to the **My Pending Validations** section. If you have been assigned as a contract document approver, it will appear with an Activity that matches your assigned role. Click the **Object** hyperlink to open it.

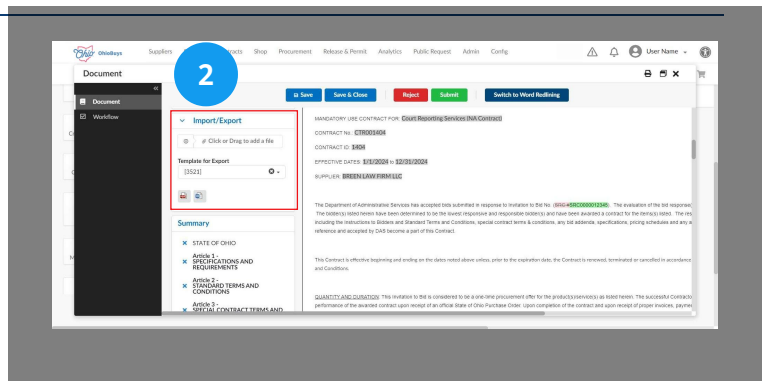
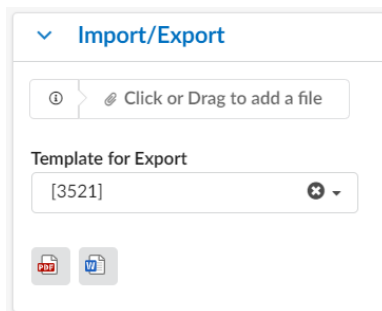
My pending validations See 11 results

Workflow	Activity	Object	Due date	History
OH Contract Authoring Workflow	Document Approver 1	Court Reporting Services (NA Contract) - Court Reporter Services Contract		
OH Contract Authoring Workflow	Final Review	Instructor - Approve a Contract Document Authoring Training - Instructor - Approve a Contract Document Authoring Training		
OH Contract Authoring Workflow	Final Review	Group 1 - Approve a Contract Document Authoring Training - Group 1 - Approve a Contract Document Authoring Training		



Exporting for Outside Redlining

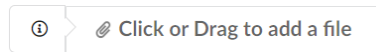
2. Users can optionally Export the document as either a PDF or Word file for review and redlining offline in the **Import/Export** section by clicking on the associated icon.



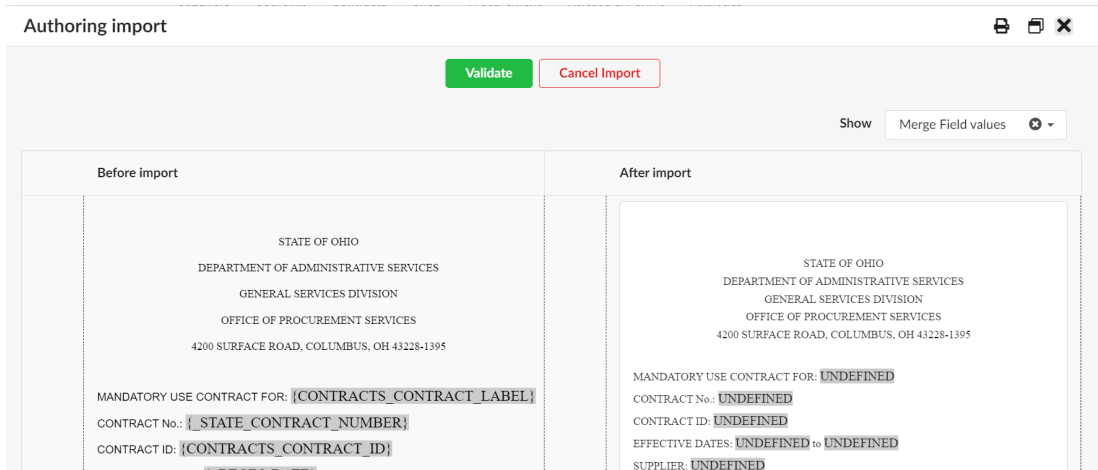
Creating and Managing Contracts

Reviewing and Redlining a Natively Authored Contract Document

If edits or redlines are made to the contract document offline, users should use the **Click or Drag to add a file** button to upload the revised document.



OhioBuys will display a comparison of the original, and updated documents.



To complete the import, click **Validate**.

▲ Note

Please note if you see Edit Document and Download buttons at the top of the page, the contract document has been authored in Microsoft Word.

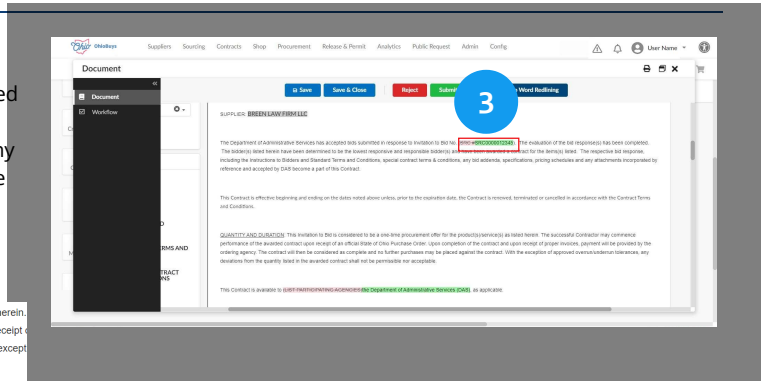
▲ Note

Please refer to the [Reviewing a \(MS Word\) Contract Document](#) content for instructions on how to review a Microsoft Word contract document.

[Reviewing a \(MS Word\) Contract Document](#)

Redlining Directly in OhioBuys

3. Users can review and redline a contract document directly within OhioBuys by clicking within a clause. Once a user has clicked inside of a clause, they have the option to make edits or add comments. Any new additions will be highlighted in green, and any content that is removed will be highlighted in red. This is also true for any additions made by previous authors to the document.



QUANTITY AND DURATION: This Invitation to Bid is considered to be a one-time procurement offer for the product(s)/service(s) as listed herein. Performance of the awarded contract upon receipt of an official State of Ohio Purchase Order. Upon completion of the contract and upon receipt of the final invoice from the vendor, the contract shall be considered complete and no further purchases may be placed against the contract. With the exception of deviations from the quantity listed in the awarded contract shall not be permissible nor acceptable.


This Contract is available to **ELIGIBLE PARTICIPATING AGENCIES: the Department of Administrative Services (DAS)**, as applicable.

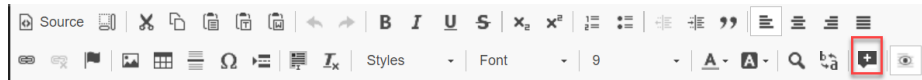
When editing in OhioBuys, contract language can be formatted as needed using the the toolbar in the image below. Note that hovering over an icon will display a tooltip explaining its functionality.



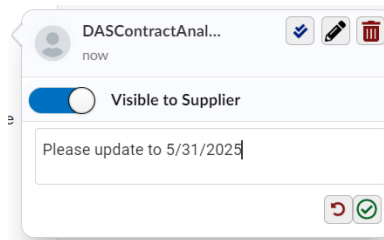
1. This one-page Contract Signature Page in its final form;
2. The Offeror's proposal, as negotiated, clarified, and accepted by the State and dated: insert date of BAFO; and
3. This RFP, as amended.



Adding Comments

Users can also redline and add comments to contract documents directly within the OhioBuys interface. To leave a comment, click on the Add a Comment () icon.






When entering comments, users have the option to indicate whether or not Suppliers should be able to see the comment by toggling the **Visible to Supplier** slider.



After entering a comment, users can either **Save** () or **Cancel** () the entry by clicking the associated icon.

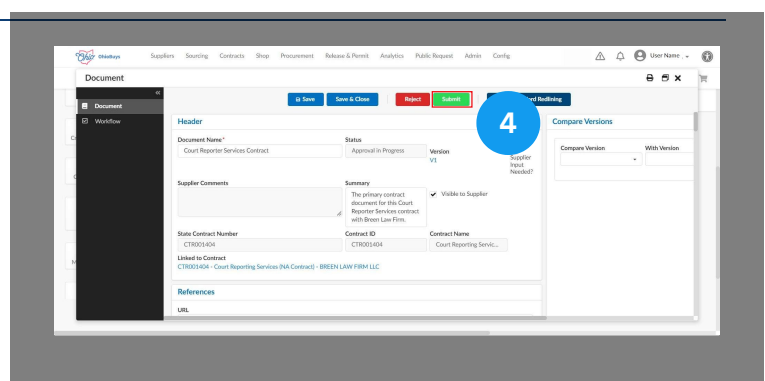
Comments entered by user can be either tagged to an entire clause. or to specific text within the clause. When there is a comment associated with part of a clause, the text will have a **yellow highlight**. Clicking on the yellow highlighted text will display the comment on the right side of the screen.

The Department of Administrative Services has accepted bids submitted in response to Invitation to Bid No. (SRC #SRC0000012345).
The bidder(s) listed herein have been determined to be the lowest responsive and responsible bidder(s) and have been awarded a con including the Instructions to Bidders and Standard Terms and Conditions, special contract terms & conditions, any bid addenda, specific by reference and accepted by DAS become a part of this Contract.

When reviewing comments, users can use the action buttons to either **Resolve** () the comment, **Edit** () the comment, or **Delete** () the comment.

Complete Review

4. After completing the review and adding any additional edits, redlines, and comments click **Submit** to advance the document forward in the contract document workflow.



▲ **Note**

If the document should be sent back to the original author, reviewers can click Reject to send the document back.



Note that after rejecting the document, users will be required to add a comment explaining the reason for the rejection.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



OhioBuys Submitting a Contract for Review

Updated: 09/29/2025 02:18 PM

Version: 6.0

1 Purpose & Profiles

This job aid covers submitting a contract record for review.

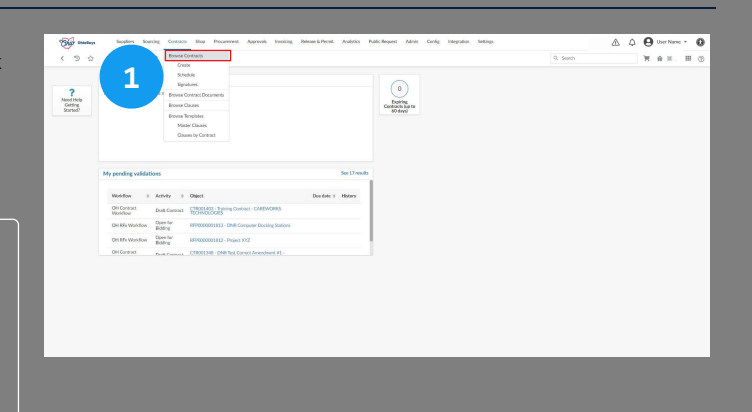
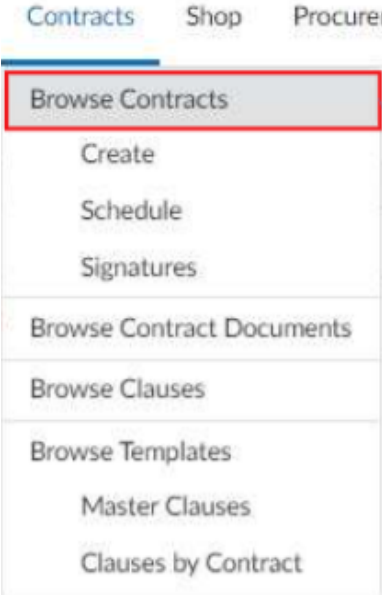
Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, Procurement Manager, Agency Sourcing Associate

2 Used When

Reference this when you have completed the contract record draft and are ready to submit.

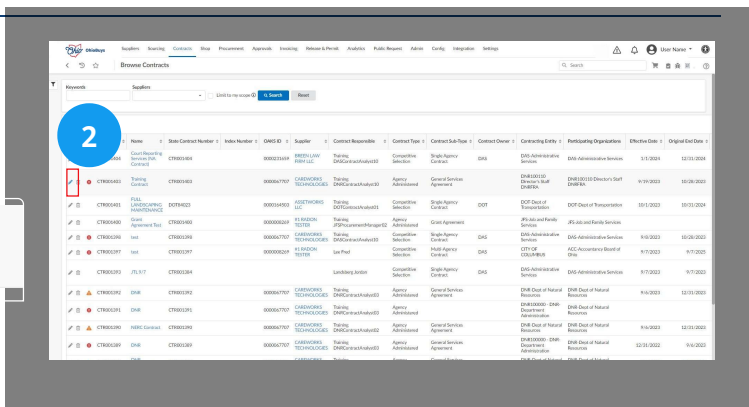
Navigate to Contracts

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



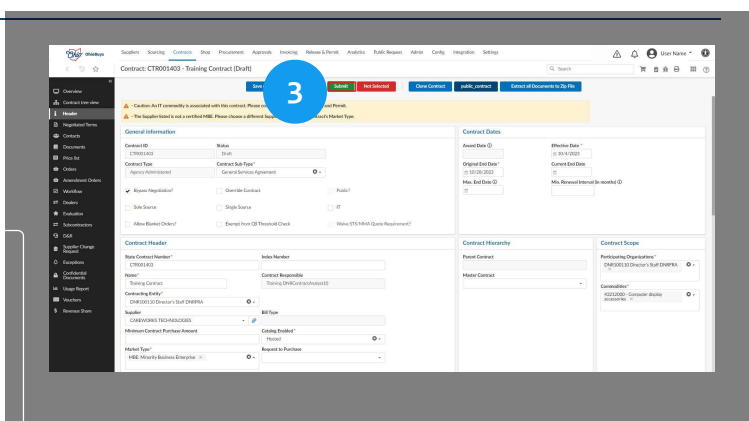
Open Contract

2. Open the contract you would like to submit by clicking the Pencil icon.



Submit the Contract

3. Click **Submit** if no further updates are required. The contract will then be sent to the Supplier unless the **Bypass Negotiations?** checkbox on the **Header** tab of the contract has been selected.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.

Reviewing & Executing Contracts

Topics

- Reviewing and Approving a Contract
- Send a Contract for Signature Using OneSpan Sign
- Upload a Signed Contract



OhioBuys Negotiating with a Supplier

Updated: 10/13/2025 04:52 PM

Version: 6.0

1 Purpose & Profiles

This job aid covers how to negotiate with the Supplier for a contract document.

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 **Supplier Input Needed?** has been checked for the contract document, and the document has been sent to the Supplier for review.

▲ Note

Negotiations with a Supplier can be bypassed. If negotiations are not bypassed, a Supplier will be able to review the draft contract and return it to the Contract Responsible team member(s) and the workflow will proceed to the "Review and edit if necessary (rejects back to Supplier if edits are made)" step of the contract workflow.

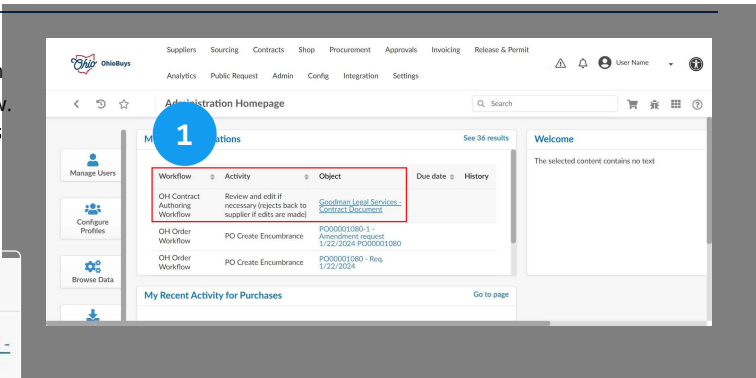
The responsible user(s) will receive an email notification when you have a contract to review, and it will also be visible on the OhioBuys homepage as an open workflow task in your My Pending Validations box.

Suppliers can review the information on the contract header and the contract documents but are unable to request any updates as part of this workflow step.

Navigate to the Contract Document

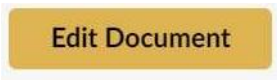
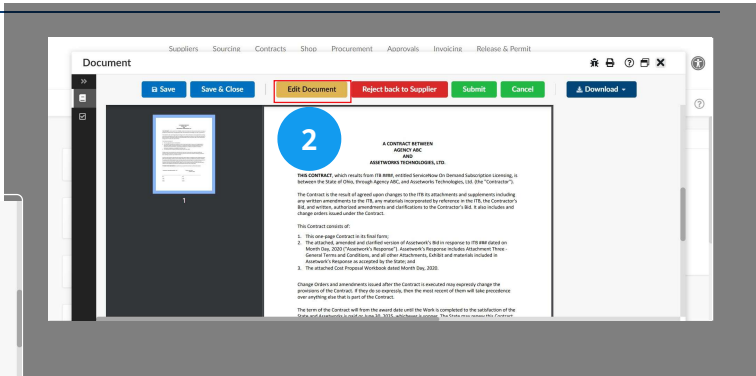
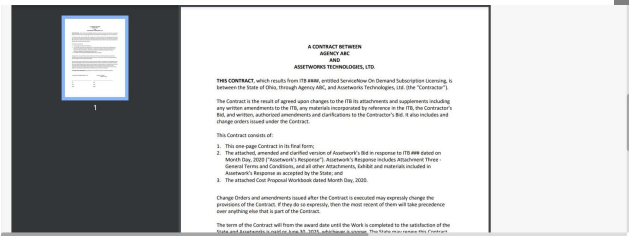
1. As the **Contract Responsible User**, log in to OhioBuys. Click on the **Object** hyperlink next to the contract that requires your review. The contract should be in the **Review and edit if necessary (rejects back to supplier if edits are made)** step.

Workflow	Activity	Object
OH Contract Authoring Workflow	Review and edit if necessary (rejects back to supplier if edits are made)	Goodman Legal Services - Contract Document
OH Order Workflow	PO Create Encumbrance	PO00001190-1- Amendment request 1/22/2024 PO00001190
OH Order Workflow	PO Create Encumbrance	PO00001190 - Req. 1/22/2024



Review the Supplier Edits

2. Review the contract document and the edits made by the Supplier. Click **Edit Document** if further changes are necessary.



For details on how to update the contract document or review comments, refer to the following document(s):

[Contract Authoring \(MS Word\).](#)

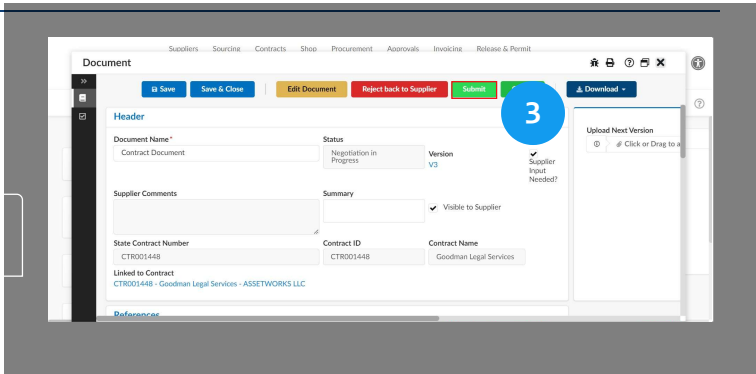
[Contract Authoring \(Native Authoring\).](#)

▲ Note

If edits are made, the contract document will be rejected back to the supplier.

Finalize the Contract Document

3. Click **Submit** to move the contract document into the **Final Review** step once no further edits are needed.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



1 Purpose & Profiles

This job aid covers the process of reviewing and approving a contract record.

Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst, IT SIM, IT SME, EITC Analyst

Used When

Reference this when a contract is routed to a Legal, IT, or Other Approver during the contract workflow.

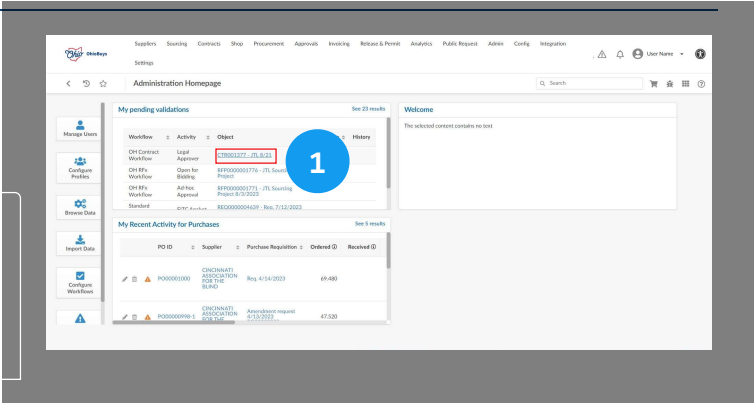
▲ Note

- Contacts with the Legal (Contract) role will be pulled in to review during the Legal Approver step in the workflow.
- Contacts with an assigned approver level (e.g. Other Approver 1, Other Approver 2, etc.) (Contract) role will be pulled in to review during the corresponding Other Approver steps in the workflow.
- At each step in the workflow, if there are multiple approvers added, all assigned users will need to approve to push the contract forward. (e.g., multiple people with Other Approver 1, Legal Approver, etc.)
- You will receive an email notification when you have a contract to review and it will also be visible on the OhioBuys homepage as an open workflow task (“Legal Approver” or “Other Approver”) in your My Pending Validations box.

My Pending Validations

1. Under **My Pending Validations**, click the **object hyperlink** next to the contract that requires your review.

Workflow	Activity	Object
OH Contract Workflow	Legal Approver	CTR001377 - JTL 8/21

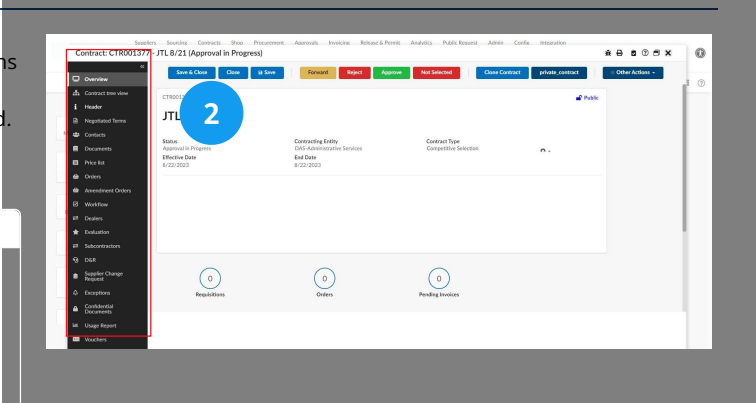


Review the Contract


2. To review the authored contract, navigate through the sections of the contract record making sure to review the Header, Negotiated Terms, and any other section that has been completed.

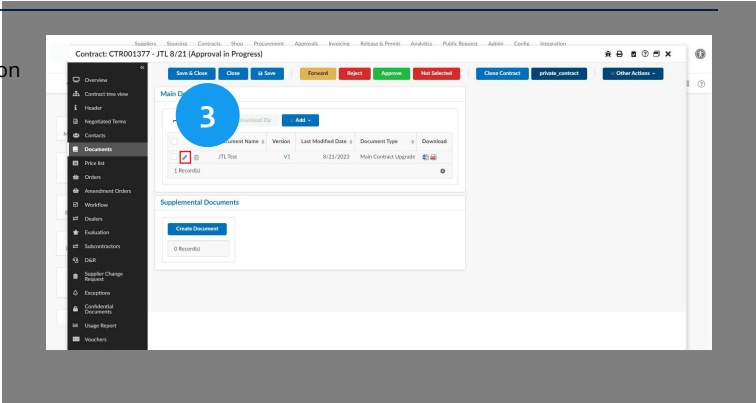
Note

The following fields will be read-only: **Contract ID, Amendment Number, Award Date, Original End Date, Bypass Negotiation, Override Contract, State Contract No., Supplier, Contract Responsible, On-hold Slider, Termination Date, Termination Justification, CB Number, and Release & Permit**



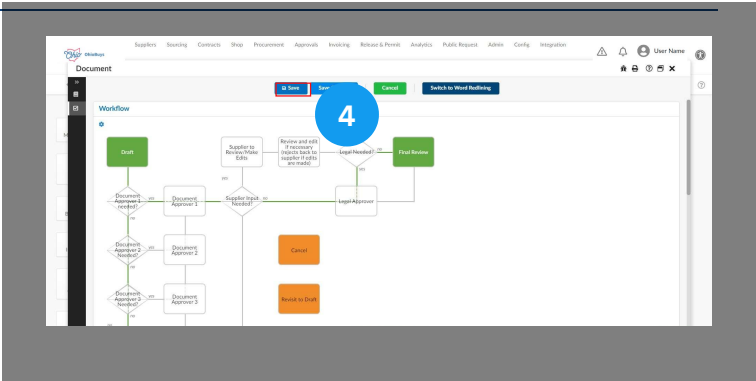
Pencil Icon

3. Navigate to the **Documents** tab and click the Pencil () icon of the contract document(s).



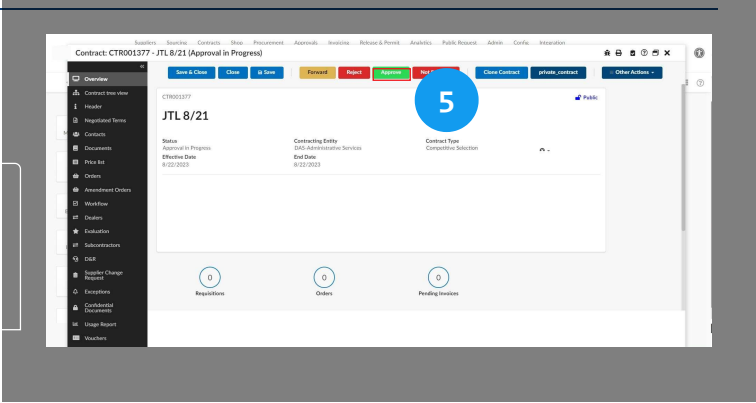
Final Review

4. Navigate to the **Workflow** tab of the document and ensure that the contract document has completed the **Final Review** step. Then, click **Save** to return back to the contract record.



Approve

5. When your review is complete, click **Approve**.



Note

IT SMEs can add additional comments in the IT SIM Peer Review step in the contract workflow. At the IT SIM Supervisor step, a comment is also **mandatory** when approving.

Note

If you would like to reject the contract, click **Reject**.



You will be required to enter a reason for your rejection. The contract will be returned to the Draft status and the Responsible team member(s).

Reason :

Cancel Confirm

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



1 Purpose & Profiles

This job aid covers the process of sending a contract for electronic signature using OneSpan Sign.

Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst

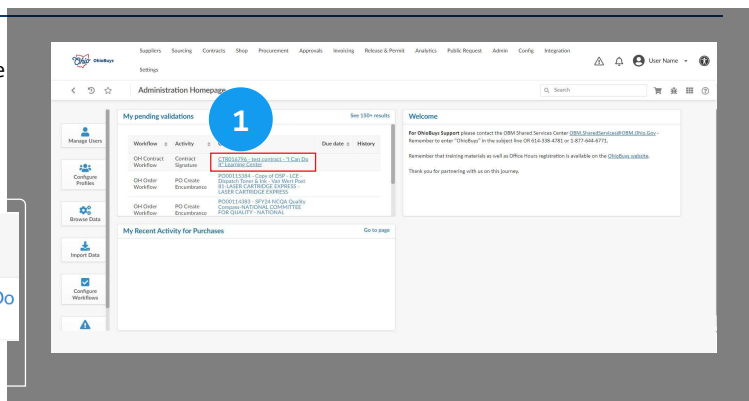
2 Used When

Reference this when a contract has been created and undergone all review and approvals and will be digitally signed.

When all of the necessary approvals for a contract have been received, the contract will enter the Contract Signature step of the workflow and appear in the **Pending Validations** for the Contract Responsible user(s).

My Pending Validations

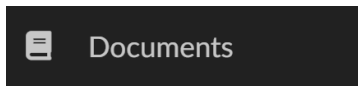
1. Log in to OhioBuys and select the name of the contract in the **Pending Validations** section.



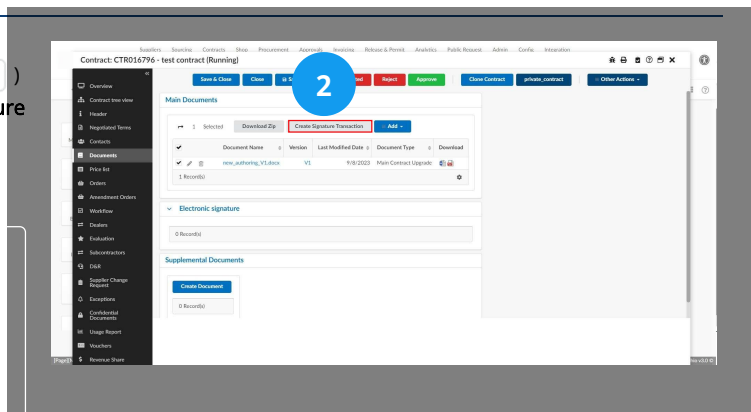
Workflow	Activity	Object
OH Contract Workflow	Contract Signature	CTR016796 - test contract - "I Can Do It" Learning Center

Create Signature Transaction

2. Navigate to the **Documents** tab and select the **Checkbox** () next to the final version of the contract. Then, click **Create Signature Transaction**.



Create Signature Transaction

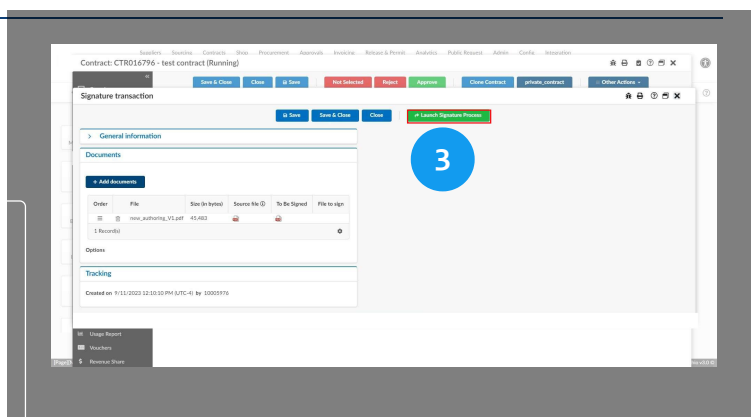


Launch Signature Process

3. Click **+Add Documents** if there are any additional documents that need to be signed. If not, click **Launch Signature Process**.

+ Add documents

Launch Signature Process



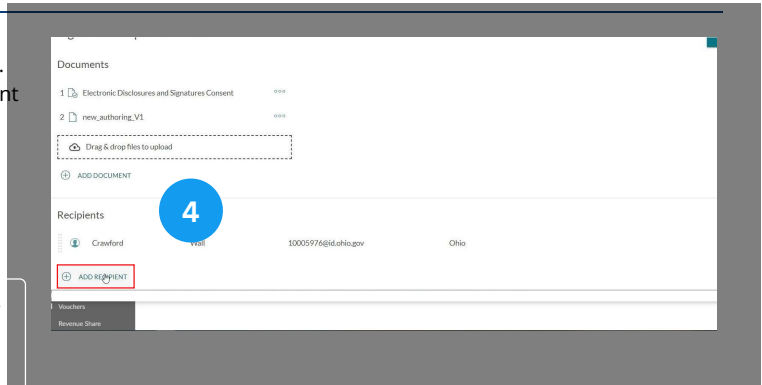
▲ Note

You will automatically be redirected to OneSpan Sign.

- If your internet browser is configured to block pop-ups, then you will need to turn off your pop-up blocker and perform this step again
- There is a limit of 16 MB for files being packaged in a OneSpan signature transaction; if users have multiple files that total more than 16 MB, the documents should be sent in separate individual signature transactions

+ Add Recipient

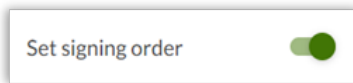
4. Once inside of OneSpan Sign, you will need to add recipients. These individuals will be everyone that needs to sign the document within the State and on the Supplier side. By default, you will be added as the first recipient. To add additional recipients, click **+ Add Recipient**.



Enter the recipient's First Name, Last Name, Email Address, Title, and Company. All recipients will receive access to complete their signatures via email.

Jordan Landsberg jordanlandsberg@kpmg.com KPMG Company

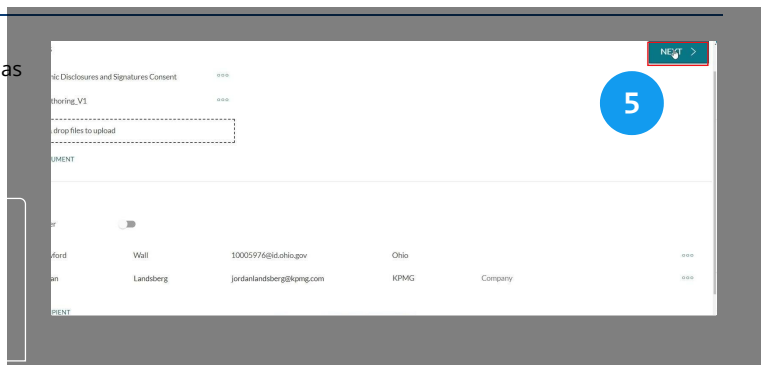
- To add additional recipient details, or to remove a recipient, click the **Ellipses** (**⋮**) icon
- To manually assign the signature order on the contract, toggle the Set signing order radio button



- If the Set signing order button is engaged, users can click and drag to the left of users' names to move them up or down in the signing order; note that the contract will not go to the second user until the first user has signed, and will not go to the third user until the second user has signed, etc.

Next

5. Once all recipients have been added, and the signing order has been documented as applicable, click **Next**.



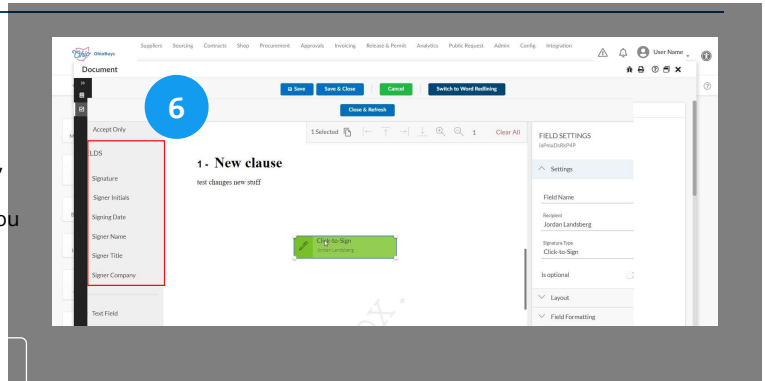
Signature Fields

6. After adding all of your recipients, you will need to add the signature fields. To add a signature field:

Select the name of the recipient that should sign

Select the type of field you would like to add (e.g., Signature, Signer Initials, Signing Date, etc.)

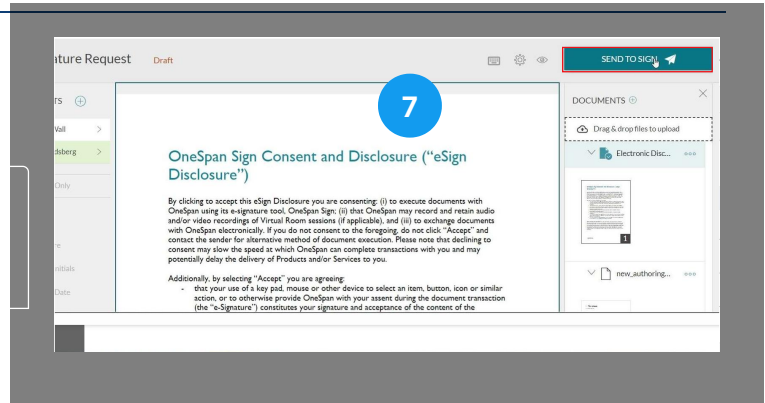
Drag and drop the field on the area of the contract where you would like the user to add this information



- Each field will be color coded to match the color for each recipient.
- Fields can be re-sized to fit the area allotted within the contract document.

Send to Sign

7. After inserting all of the correct fields, click **Send to Sign**.



▲ Note

An email will be sent to each recipient with a link to the contract, and the order of these emails will be based on the recipient order that was established for the contract

▲ Note

Active signature transactions can be tracked in the Electronic Signature section of the Documents tab.

Electronic signature								
Created on (UTC-4)	Documents	Signers	Status	Submission Date (UTC-4)	Created by	Launched by	Remote Status	Completed on
9/11/2023 12:10:10 PM			In progress	9/11/2023 12:10:20 PM	Wall Crawford	Wall Crawford	DRAFT	
1 Record(s)								

Please note, the Electronic Signature section does not update automatically. To check the status of a contract signature, click the **Refresh** () icon.

After signing through OneSpan Sign is complete, you may wish to store a copy of the signed contract on the Supplier Confidential Documents tab. To download the signed contract, click the **PDF** () icon.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.

Ohio OhioBuys Uploading a Signed Contract

Updated: 10/07/2025 04:11 PM

Version: 6.0

1 Purpose & Profiles

This job aid covers the process of signing a contract document outside of OhioBuys then uploading the signed document.

Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst

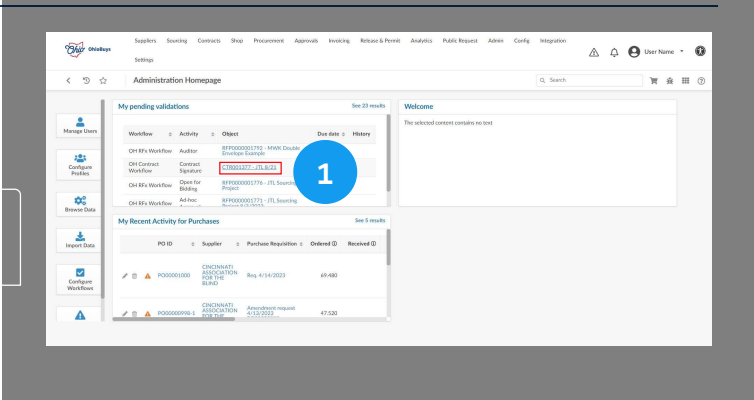
2 Used When

Reference this when a contract has been created and undergone all review and approvals outside of OhioBuys.

When all required reviewers and approvers have approved a contract, the contract will enter the Contract Signature step in the workflow and appear in the **My Pending Validations** section for the Contract Creator.

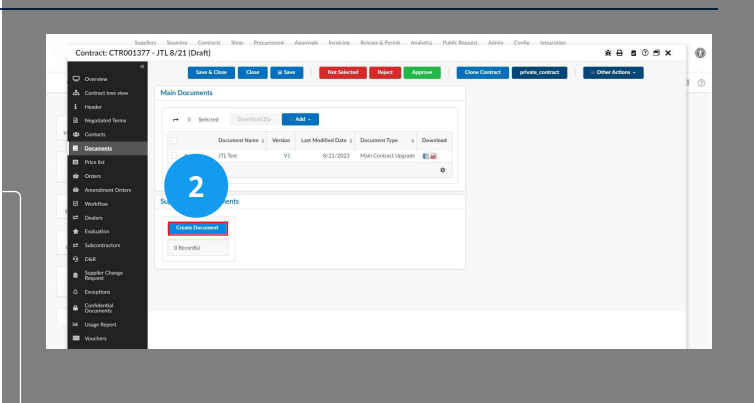
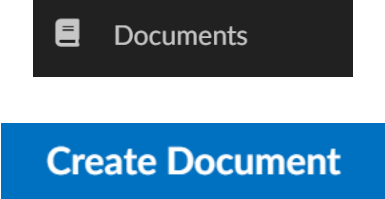
My Pending Validations

1. In the **My Pending Validations** section, select the name of the contract.



Create Document

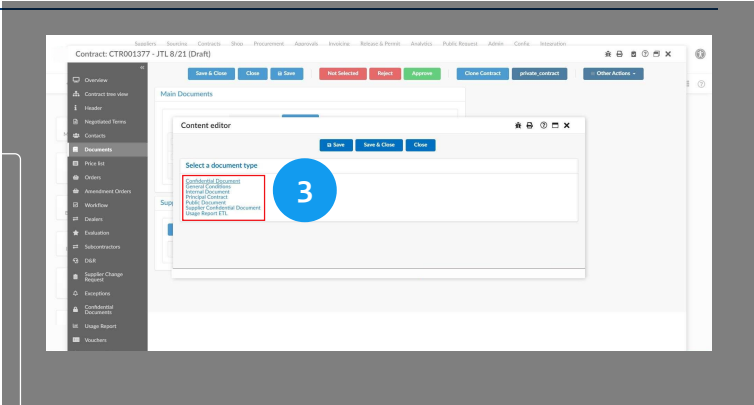
2. Navigate to the Documents tab. Under the Supplemental Documents section, click Create Document.



Document Type

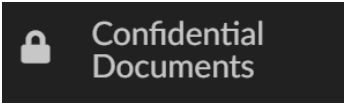
3. Select your document type.

- Select a document type
- Confidential Document
 - General Conditions
 - Internal Document
 - Principal Contract
 - Public Document
 - Supplier Confidential Document
 - Usage Report ETL



▲ Note

Signed contracts should be uploaded as **Supplier Confidential Documents**. This allows both internal and Supplier teams to see the contract. These documents will also be visible to users with the Confidential Documents role. These documents will also be visible to users in the contracting organization with the Confidential Documents role. For more information on the different security restrictions and uses for each document type, refer to the training materials with instructions for Uploading Documents.



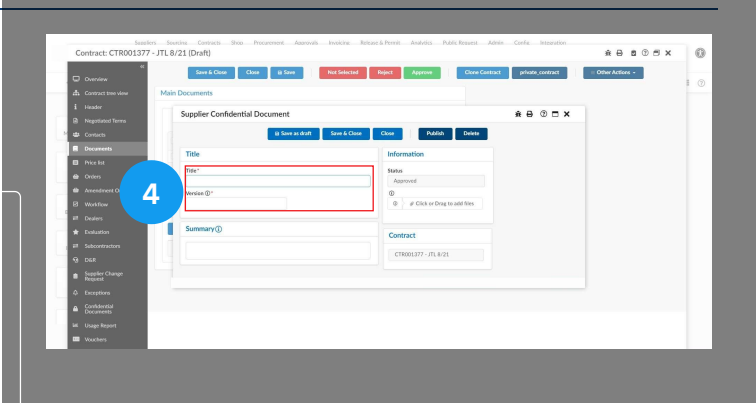
Title and Version

4. Complete the mandatory fields; insert the **Title** of the document and insert the **Version** number of the contract.

Title

Title*

Version ⓘ*

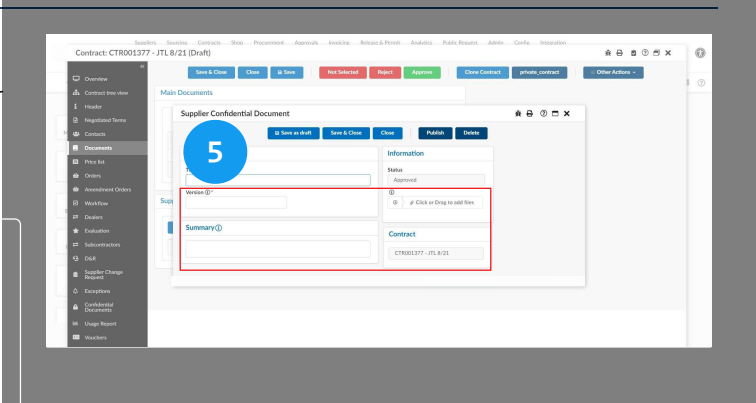


Summary and Attachments

5. Complete the non-mandatory fields as necessary; insert a thorough description of the document in the **Summary** tab and/or add attachments by clicking **Click or Drag to add files**.

Summary ⓘ

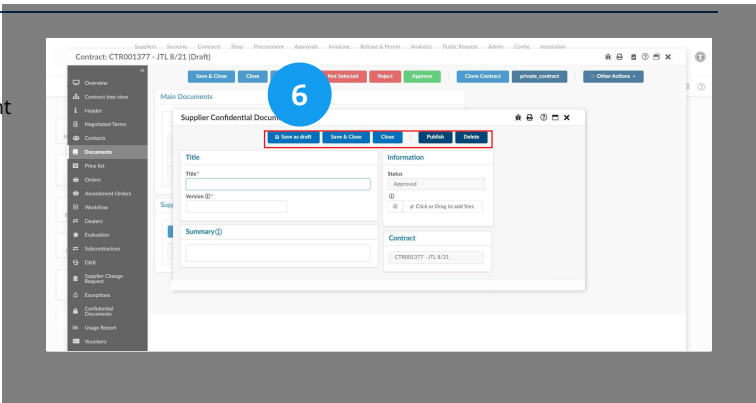
 Click or Drag to add files



Save, Close, Publish, Delete

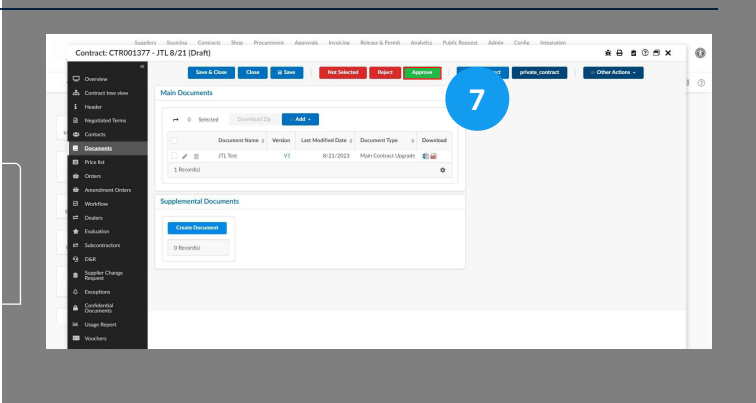
6. After completing the document fields and uploading the document as an attachment:

- To save as a draft and finish later, click **Save & Draft**
- To save as a draft and close the window, click **Save & Close**
- To close the document without saving, click **Close**
- To publish the final version, click **Publish**
- If you have a saved draft, but wish to cancel the document click **Delete**



Approve

7. After uploading the signed contract, click **Approve**.



You have now completed the steps for uploading a signed contract in OhioBuys. To manage a contract during its lifecycle, refer to Managing Contracts for instructions on processing contract change requests, creating amendments, suspending contracts, and terminating contracts.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.

Managing Contracts

Topics

- Process a Change Request
- Create an Amendment
- Suspend a Contract
- Clone a Contract
- Terminate a Contract



OhioBuys Processing a Change Request

Updated: 10/07/2025 04:11 PM

Version: 7.0

Purpose & Profiles

This job aid covers the process of fielding a change request for a contract from a Supplier in OhioBuys.

Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst

Used When

Reference this when a change request is submitted in OhioBuys by a Supplier.

Note

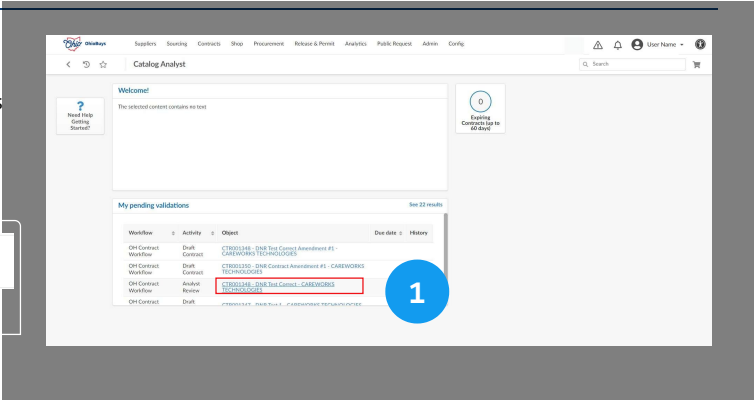
Suppliers can submit a change request for various reasons. When a change request is submitted, the contract will appear in the **Pending Validations** for the Contract Responsible user(s).

You will receive an email notification when you have a contract change request to review and it will also be visible on the OhioBuys homepage as an open workflow task ("Analyst Review") in your **My Pending Validations** box.

My Pending Validations

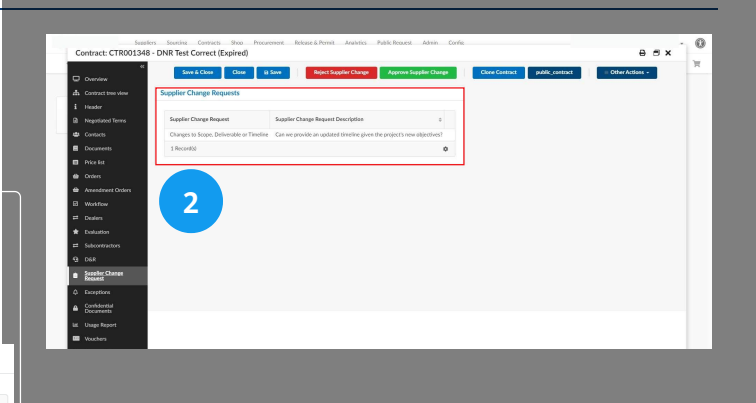
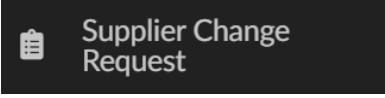
1. Log in to OhioBuys. Under **My Pending Validations**, click the object hyperlink next to the contract change request that requires your review.

OH Contract Workflow	Analyst Review	CTR001348 - DNR Test Correct - CAREWORKS TECHNOLOGIES
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Supplier Change Request

2. Navigate to the **Supplier Change Request** tab to view the request details.

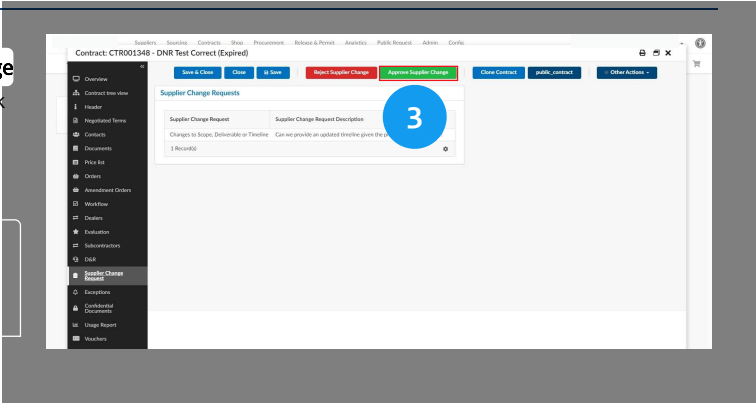


Supplier Change Requests

Supplier Change Request	Supplier Change Request Description
Changes to Scope, Deliverable or Timeline	Can we provide an updated timeline given the project's new objectives?
1 Record(s)	

Approve Supplier Change

3. To approve the change request, click **Approve Supplier Change** and an amendment will be created. If not approving, you can click **Reject Supplier Change** and provide a reason.



To reject, click **Reject Supplier Change**. You will be required to enter a reason for the rejection, and the contract will remain in Signed status.



If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



Updated: 10/08/2025 04:51 PM

Version: 9.0

📌 Purpose & Profiles

This job aid covers the process of creating an amendment to an existing contract in OhioBuys.

Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Real Estate Contract Analyst, Agency Contract Analyst

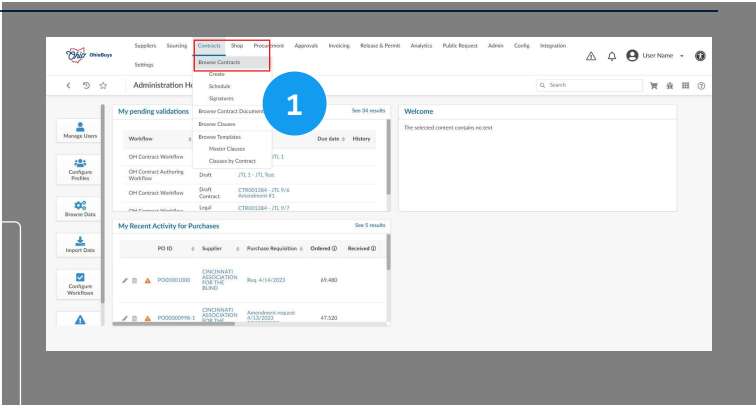
📖 Used When


Reference this when a change to a contract or its details needs to be made and reviewed/approved in OhioBuys.

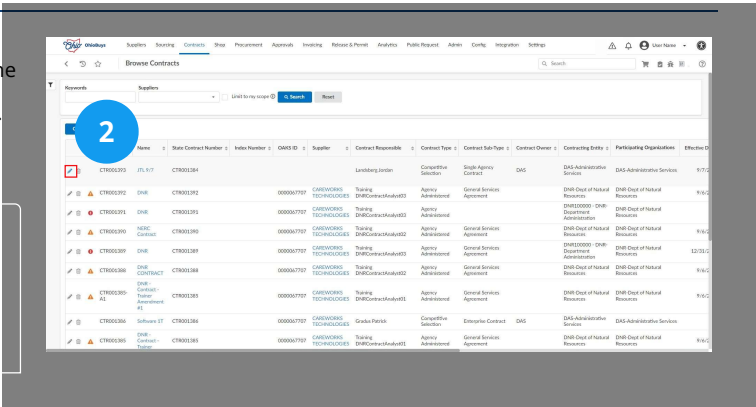
▲ Note

- Amendments can be created after a need arises internally within the State or Agency, or at the request of a Supplier. The change request must be fully approved first.
- Amendments can also be future dated meaning the **Effective Date** can be set for a date that is after the date the amendment was created. The amendment won't supersede the original contract until the effective date occurs. The original contract will no longer be active once the amendment is effective.
- If needed, the **Contract Responsible** field can be edited / updated as part of an amendment process. Please note, this field is only present on contracts that interface to OAKS and is not present on Agency Administered contracts.
- As increases in the contract value are needed, agencies can create an amendment and increase the **Contract Not to Exceed** field. If the contract is not an Agency Competitive Selection contract, OhioBuys will check the updated value against the cumulative balance of the **Controlling Board Number** referenced.
- If an IT Contract is amended and the value of the contract is increased, the associated **Release & Permit** value will automatically increase accordingly, unless the value of the contract and amended contract are less than \$25,000 in which case the agency's IT Blanket Release & Permit will be applied. In the event that a contract was originally for less than \$25,000 and the amendment causes the value to exceed \$25,000, a standard IT Release & Permit will be issued for the difference between the amendment's **Not to Exceed** value and the original contract's **Not to Exceed** value.
- A user can create an amendment on a contract with an "awaiting effective date" status. These amendments will allow the user(s) responsible for the contract to make updates to the contract and carryover the edits in the contract awaiting effective date. Please note that this functionality is not available on agency-administered contracts.

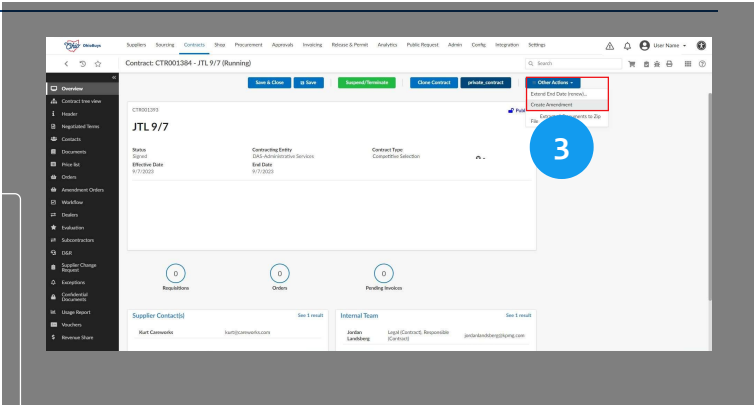
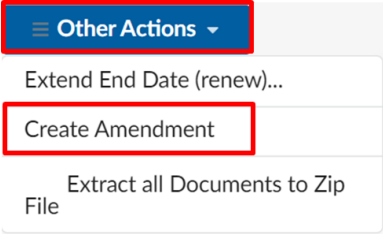
1. To create an amendment, log in to OhioBuys. From the Main Menu Navigation Bar, click **Contracts** and then select **Browse Contracts** from the drop-down menu.



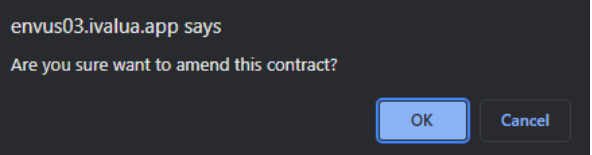
2. Search for your contract using the **Keywords** field and click the **Pencil** () icon next to the contract that needs to be amended.



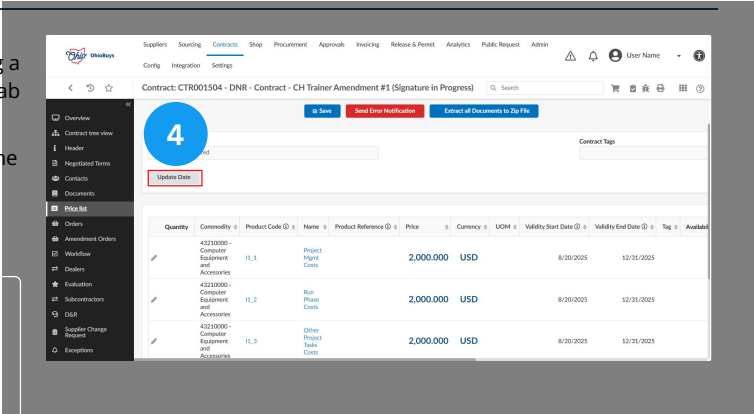
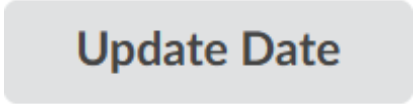
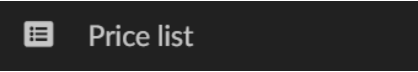
3. Click **Other Actions** and then select **Create Amendment** from the drop-down menu.



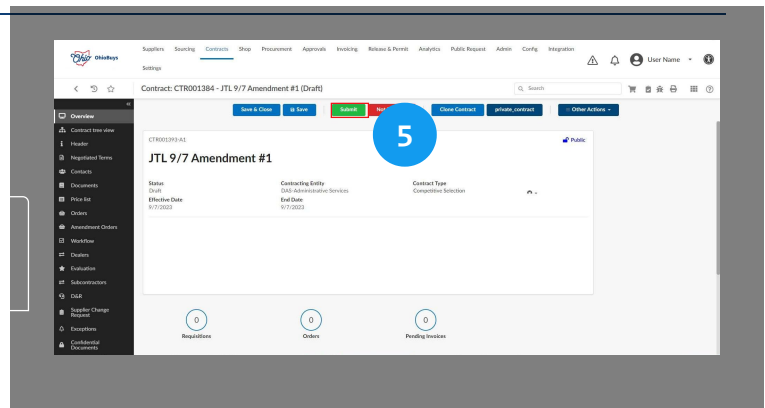
You will be asked if you are sure you want to amend the contract. Click **OK** to proceed. A new contract will be created in Draft status that will be listed as a child of the original contract.




4. Make updates to the contract as needed. If you are amending a contract that has a price list, be sure to navigate to the **Price List** tab and click the **Update Date** button to ensure that price list item validity end dates are updated to match the current end date of the contract.

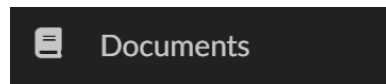


5. Click **Submit**. Amendments will go through the full approval process for contracts.



▲ **Note**

- OhioBuys will send a notification to any Requesters/Requisitioners with an in-flight requisition that references a contract currently undergoing an amendment. The notification is sent when the Draft step is completed and when the Hold Until Effective Date step of the contract workflow is completed.
- To amend a contract document, navigate to the **Documents** tab within the associated contract. In the Main Documents section, click the **Pencil** () icon next to the contract document to open it.



- Select **Create a New Version** in the pop-up window if you are creating the one new version per the amendment. Click **Edit Document** if you need to make minor changes. Never create multiple new versions of a document within the same amendment draft.
- When editing the document/new version, mark in-line changes with an asterisk (*) and use an asterisk footnote to indicate the effective date of the amendment
 - Footnote example: *Indicates update to ___ with ___, effective 02/02/25
- Update the Summary of Amendments table with the newest amendment at the top of the list of amendments. If a Summary of Amendments is not present, create a table for it as a subsection of an Amendments section.
- The new amended contract document will need to be resubmitted into the contract document workflow
- To compare versions of a contract document, navigate to the Documents tab. Within the Main Document section, click the hyperlink of a version to compare (e.g., **V1**).
 - In the pop-up window, use the drop-down to select the versions for Compare Version and With Version. Then click, See Comparison. A Word document will open with changes displayed in the Track Changes feature.
 - V0 is the template that was used to create the document for the solicitation. V1 is the original contract. Any subsequent versioning (V2, V3, etc.) denotes amendments.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.



Updated: 10/07/2025 04:21 PM

Version: 9.0

1 Purpose & Profiles

This job aid covers the process of suspending a contract or "putting it on hold" in OhioBuys.

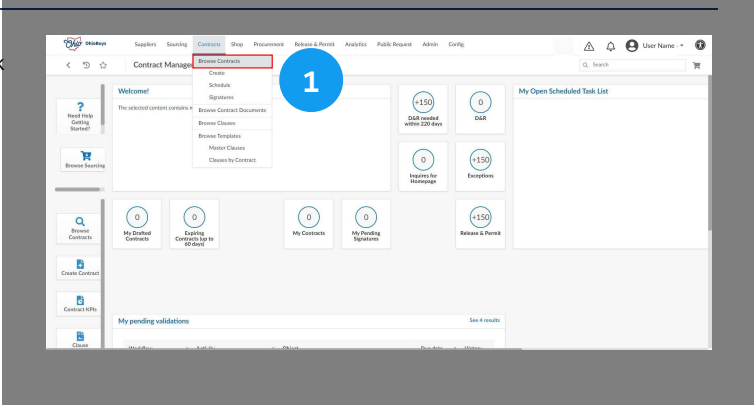
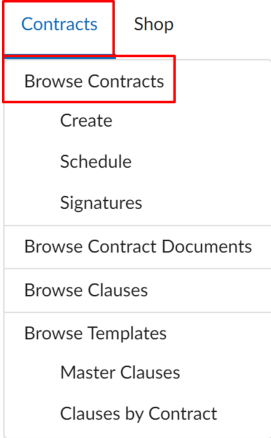
Profiles: Procurement Manager, Agency Procurement Manager, DOT Procurement Manager, Printing Procurement Manager

Used When

Reference this when a contract in OhioBuys needs to be put on hold or suspended.

Contracts: Browse Contracts

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

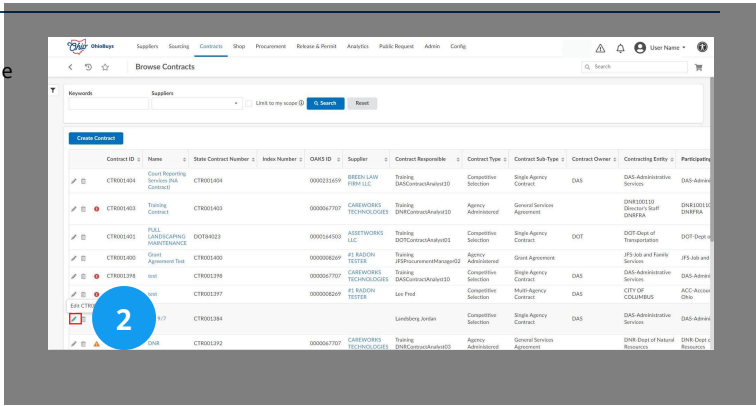


Pencil Icon

2. Search for your contract using the **Keywords** field and click the **Pencil** icon next to the contract that needs to be suspended.

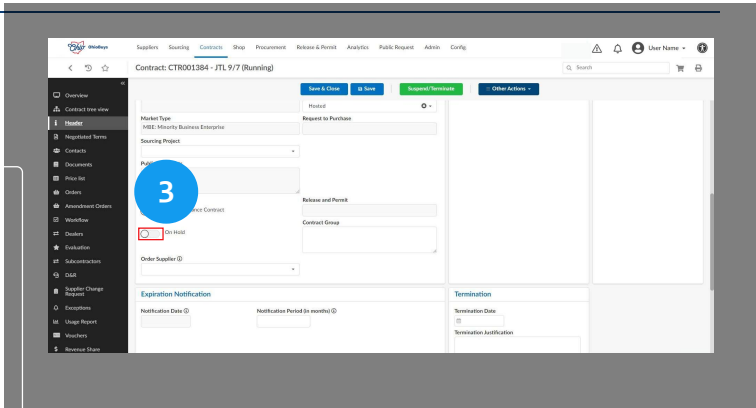
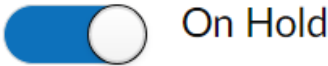
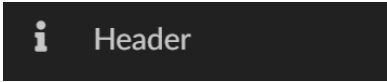
Pencil icon: 

Keywords



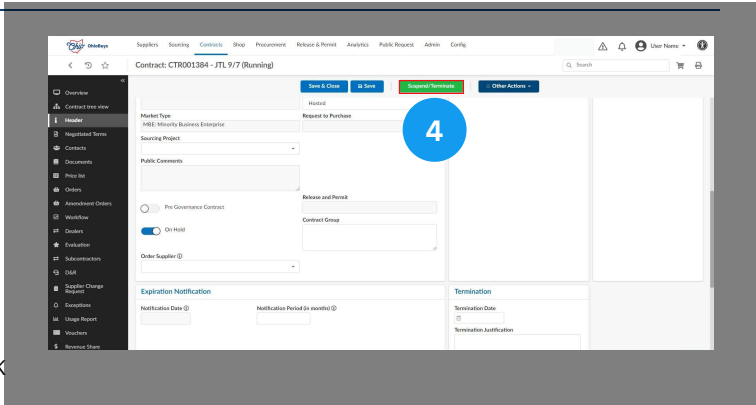
On Hold Slider

3. Navigate to the **Header** tab. Engage the **On Hold** slider.



Suspend/Terminate

4. Click **Suspend/Terminate**.



After clicking the Suspend/Terminate button, you will be asked to confirm the suspension with a browser pop-up message. Click OK to suspend the contract. If suspended, the contract status will be updated to "Terminated" and the validity will remain "Running" until the termination date is reached.

▲ **Note**

The contract is then moved to a status of Suspended and sent to the Pending Validations for individuals with the Procurement Manager profile. Other individuals are pulled in based on the contracting entity, contract sub-type, contract type, or how the contract is administered (state-wide or agency administered). DOT Procurement Managers, Printing Procurement Managers, Real Estate Contract Analysts, and Agency Contract Managers are pulled in respectively in those cases.

The users pulled in have the ability to reactivate the contract by clicking **Un-suspend** if there are no changes (i.e., contract amendments) needed. Alternatively, the Contract can remain in suspended status and the Contract Responsible user(s) can create an Amendment.



Refer to the "**Terminate a Contract**" section for instructions on terminate a contract prior to its original end date.

Terminate a Contract

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuys: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.

Ohio OhioBuys Cloning a Contract

Updated: 10/07/2025 04:12 PM

Version: 6.0

1 Purpose & Profiles

This job aid covers the process of cloning a contract in OhioBuys.

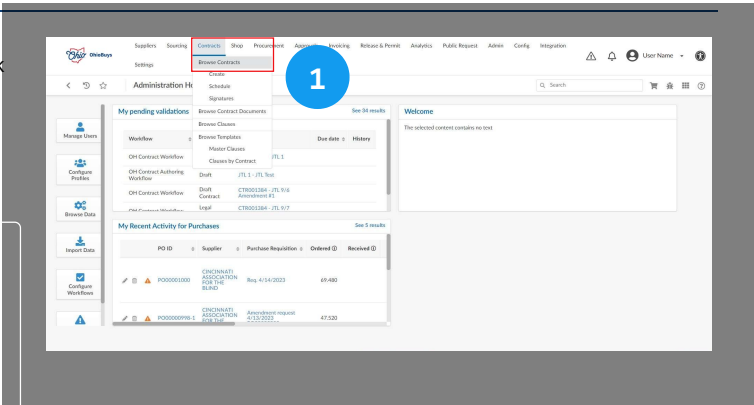
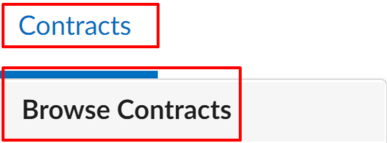
Profiles: Contract Analyst, DOT Contract Analyst, Printing Contract Analyst, Procurement Manager, Real Estate Contract Analyst, Agency Contract Analyst

Used When


Reference this when a contract in OhioBuys needs to be duplicated, but not amended.

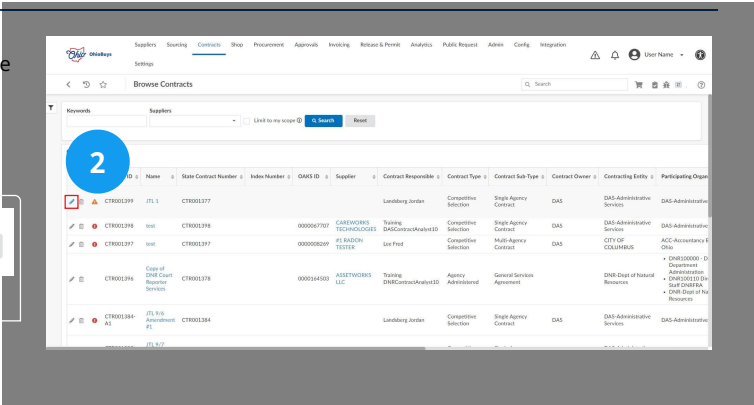
Contracts: Browse Contracts

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



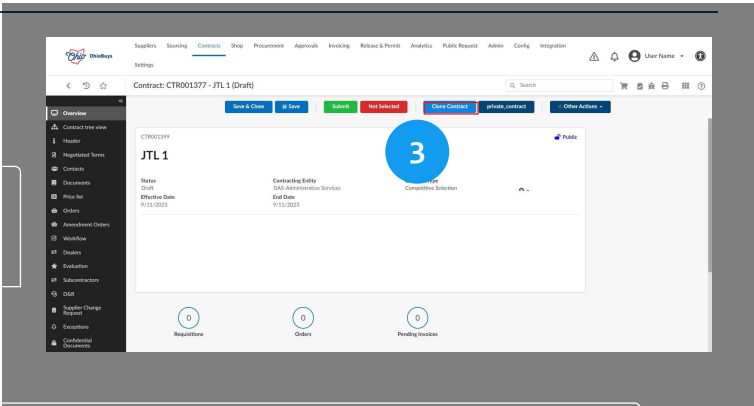
Pencil Icon

2. Search for your contract using the Keywords field and click the **Pencil** () icon next to the contract that needs to be cloned.

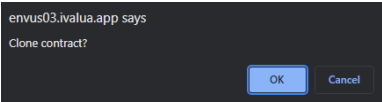


Clone Contract

3. Click **Clone Contract**.



Click **OK** in the subsequent pop-up box



To clone a contract, you must be currently set as the contract responsible.

A copy of the existing contract has been created. All of the information from the Header of the original contract will carry over to the duplicate except for the **Market Type** field. You will also need to update the **Effective Date** so that it is not back-dated.

Contacts and Negotiated Terms will also carry over to the duplicated contract, but information from other tabs will not (e.g., Documents, Price List, Dealers, etc.)

The cloned contract should be edited and set up as a new contract. It will also need to go through the appropriate approval workflow according to how the contract is set up.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuy: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.

Ohio OhioBuys Terminating a Contract

Updated: 10/07/2025 04:22 PM

Version: 7.0

1 Purpose & Profiles

This job aid covers the process of terminating an active contract in OhioBuys.

Profiles: Procurement Manager, Agency Procurement Manager, DOT Procurement Manager, Printing Procurement Manager

2 Used When

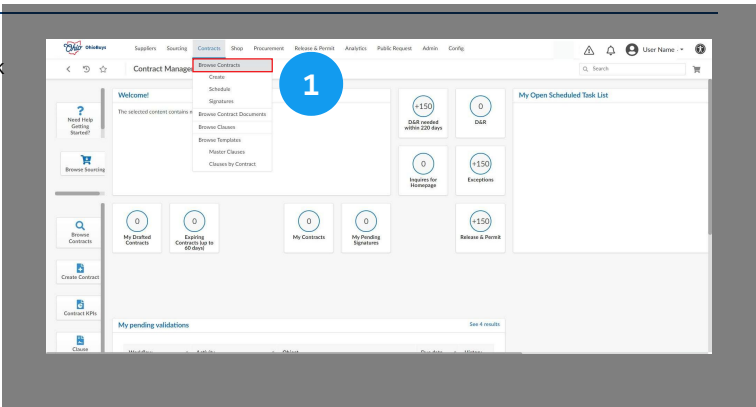
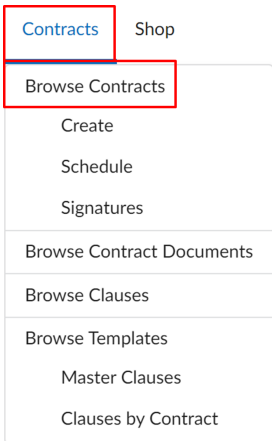
Reference this when a contract that is active needs to be terminated prior to its end date.

▲ Note

Terminating a contract is a decision that is pre-determined prior to initiating the process in OhioBuys. Contract Analysts have the capacity to initiate the termination process; however, the Procurement Manager is required to complete the termination process by entering the Termination Date and Termination Justification.

Contracts: Browse Contracts

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

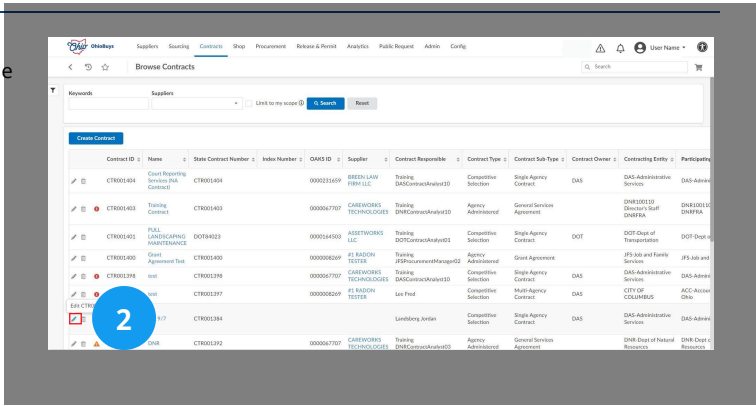


Pencil Icon

2. Search for your contract using the **Keywords** field and click the **Pencil icon** next to the contract that needs to be suspended.

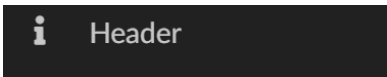
Pencil icon: 

Keywords



Termination Date and Termination Justification

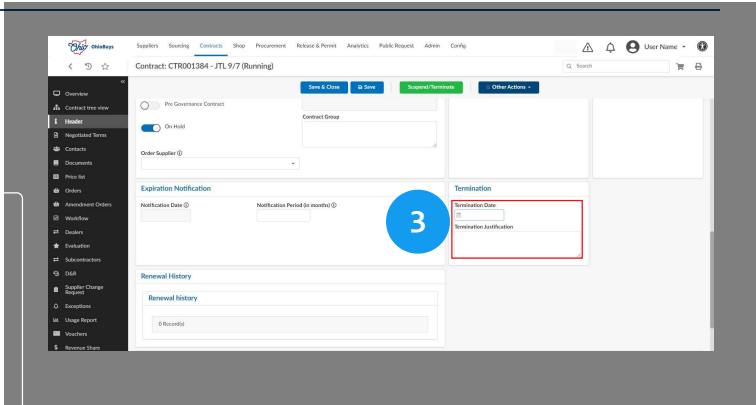
3. Navigate to the **Header** tab. Enter a **Termination Date** and **Termination Justification**.



Termination

Termination Date

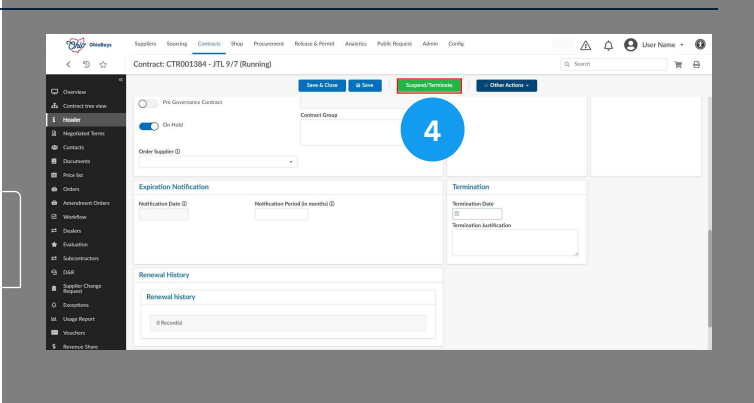
Termination Justification



Terminate

4. Click **Suspend/Terminate**. The contract will expire when the termination date is reached.

Suspend/Terminate



You will be asked to confirm the suspension with a pop-up message. Click **OK** to suspend the contract.

If you have questions or need additional assistance, please contact the OBM Financial Support Services to create a help desk ticket for OhioBuyz: 1-877-644-6771 OR OBM.ContactCenter@obm.ohio.gov.