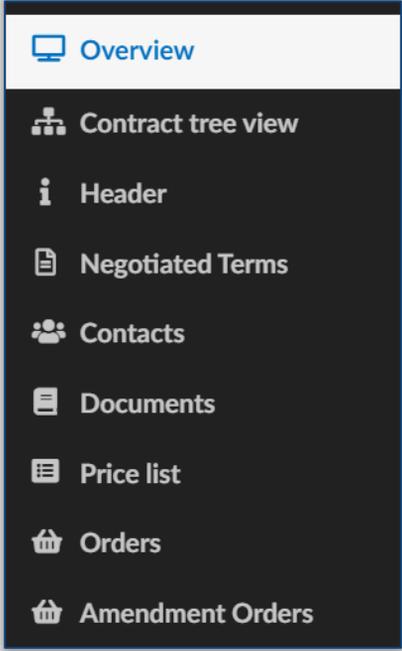


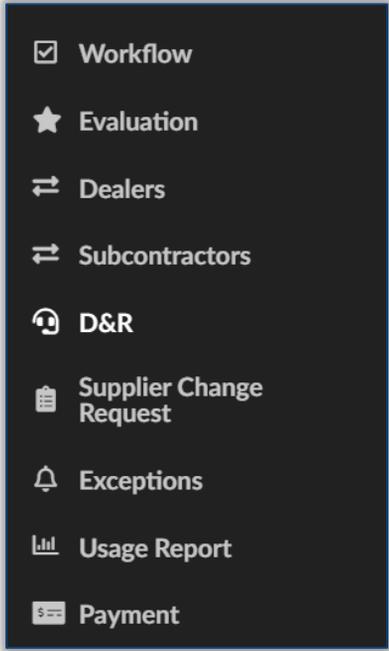
CONTRACT FIELD GUIDE

Contract Field Guide: Contract Tabs



Object	Definition	Additional Info
Overview	Displays an overview of the contract in a dashboard, including the number of orders made off the contract and the contacts associated with it	Information contained on the Overview tab may not be as detailed
Contract Tree View	Displays any related contracts and amendments	
Header	Displays information about the contract record, such as the contract number, contract status, and contracting entity	Users will input the information on this tab as part of creating a contract record. If the contract is created from a solicitation, much of this information may be pulled over directly from the solicitation
Negotiated Terms	Displays a “cheat-sheet” of contract information, including important finance-related information such as the contract not to exceed amount, payment terms, and chartfield information	Users will input the information on this tab as part of creating a contract record
Contacts	Displays State users and Suppliers associated with the contract record	Users will input the information on this tab as part of creating a contract record
Documents	Displays the documents associated with the contract, including the main contract document	Users will input this information on this tab as part of creating a contract record. Users can upload completed contract documents or begin the Contract Authoring process by creating new documents on this tab. Users can also begin a signature transaction using OneSpan sign on this tab
Price List	Displays the price list for hosted catalog items on the contract.	Note that if the contract is not a hosted catalog contract this tab will contain no items
Orders	Displays purchase orders created using the contract	
Amendment Orders	Displays purchase orders created using an amended version of the contract	

Contract Field Guide: Contract Tabs



Object	Definition	Additional Info
Workflow	Displays the contract's position in the workflow	Users can check who is currently responsible for approving the contract by navigating to the Approval History table at the bottom of the page
Evaluation	Displays any performance evaluations associated with the contract	
Dealers	Displays any dealers associated with the contract	Users with the Responsible role on the contract will enter dealers when setting up the contract
Subcontractors	Displays any subcontractors associated with the contract	Users with the Responsible role on the contract will enter subcontractors when setting up the contract
D&R	Displays the records of any D&Rs associated with the contract	Note that this tab will not display D&Rs that were created prior to OhioBuys
Supplier Change Request	Displays any requested changes made by Suppliers	The Responsible user on the contract will need to confirm or reject the changes - If the responsible user confirms the changes, they should begin the amendment process
Exceptions	Displays any exceptions created against the contract	
Usage Report	Displays any Usage Reports uploaded by Suppliers on the contract	Suppliers can obtain a Usage Report template. After completing this template, Suppliers will need to submit an OSS Help desk ticket for assistance uploading their usage reports
Payments	Displays any payments made on a contract	

Contract Field Guide: Contract Header (1/4)

The screenshot shows a web-based form for entering contract header information. At the top right, there are three buttons: "Save & Close", "Save", and "Extract all Documents to Zip File". The form is divided into four main sections:

- General information:** Includes fields for Contract ID, Status (with a dropdown menu showing "Draft"), Contract Type (dropdown), and Contract Sub-Type (dropdown). There are also checkboxes for "Bypass Negotiation?", "Override Contract", and "Public?".
- Contract Dates:** Includes date pickers for Award Date, Effective Date, Original End Date, Current End Date, Max. End Date, and Min. Renewal Interval (in months).
- Contract Header:** Includes fields for State Contract Number, Index Number, and Name.
- Contract Scope:** Includes dropdown menus for Participating Organizations and Commodities.

Object	Definition	Additional Info
Current End Date	The date that the contract ends	May reflect termination date or modified end date due to renegotiation. Optional
Code	A unique system identifier for the contract	Automatically assigned by OhioBuys
Confidential	Indicates if the contract is confidential	If checked, this contract will be hidden from all State users. The only users that will be able to these documents are those listed as internal team members and users with the Confidential Documents role
Contract Sub-Type	Sub-category for contracts	Example: Single Agency Contract. Full list available in the Creating a Contract section.
Contract Type	Main category for contracts	Example: Competitive Selection. Full list available in the Creating a Contract section.
Effective Date	The start date for the contract	Can be after the signature date and must be dated prior to the Original End Date and Actual End Date
Original End Date	The end date for the contract at the time the record is created	Must be dated after the Effective Date; optional for OFCC contracts where the Contract Owner field is set to CNS.
Signature Date	The date the contract was signed	If multiple signatories have different dates, it is the latest date listed
Status	Indicates the status of the contract	Statuses include: Draft, Signed, Signature In Progress, Approval In Progress, Approved, Negotiation In Progress, Deleted, Cancelled by Amendment
Termination Comments	Additional detail on why contract was terminated early	
Termination Date	Termination date if contract terminated early	

Contract Field Guide: Contract Header (2/4)

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*
DPS200000 - OHIO STATE HIGHWAY PATROL	<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"/> Staff Aug Contract <input type="radio"/> On Hold	Internal Contract Notes <input type="text"/> Order Supplier ⓘ <input type="text"/>

Object	Definition	Additional Info
Commodities	The commodity codes for the items included in the contract	Codes follow UNSPSC code structure
Contracting Entity	The agency or group responsible for initiating the contract.	
Contract Owner	The organizational entity that functions as the lead/point of contact for the contract	OIT contracts influence purchase requisition workflow for IT related purchases
Index Number	Internal Contract Number	State's internal contract number
Internal Contract Notes	A field for agencies to capture notes and working details about their contracts.	Notes will be copied over on contract amendments to the new version of the contract.
Market Type	This field indicates the type of Suppliers that are on the contract (e.g. MBE, EDGE, CRP)	Example: Minority Business Enterprise "3" Contract
Minimum Contract Purchase Amount	Indicates that a single request must contain a minimum total value related to this contract in order to become a purchase order	The minimum total value could be the sum of different lines within the same request. Will trigger a blocking alert for all requests containing items from this contract
Name	The name or label for the contract	
Order Supplier	The Order Supplier that will be used for all purchases referencing this contract	
Participating Organizations	The organizations that are allowed to access and purchase items from this contract	These values will limit who can see items related to this contract while shopping

Contract Field Guide: Contract Header (3/4)

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*
DPS200000 - OHIO STATE HIGHWAY PATROL	<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"/> Staff Aug Contract <input type="radio"/> On Hold	Internal Contract Notes <input type="text"/> Order Supplier
	<input type="text"/>

Object	Definition	Additional Info
Pre Governance Contract		
State Contract Number	The contract number assigned by the State (e.g., CTR002226)	This does auto-populates with the CTR number generated by OhioBuys but can be modified as needed.
Supplier	This is the Contractor or organization that is entering into the agreement with the State	Supplier must already have a record in OhioBuys in order to be selected

Contract Field Guide: Contract Header (4/4)

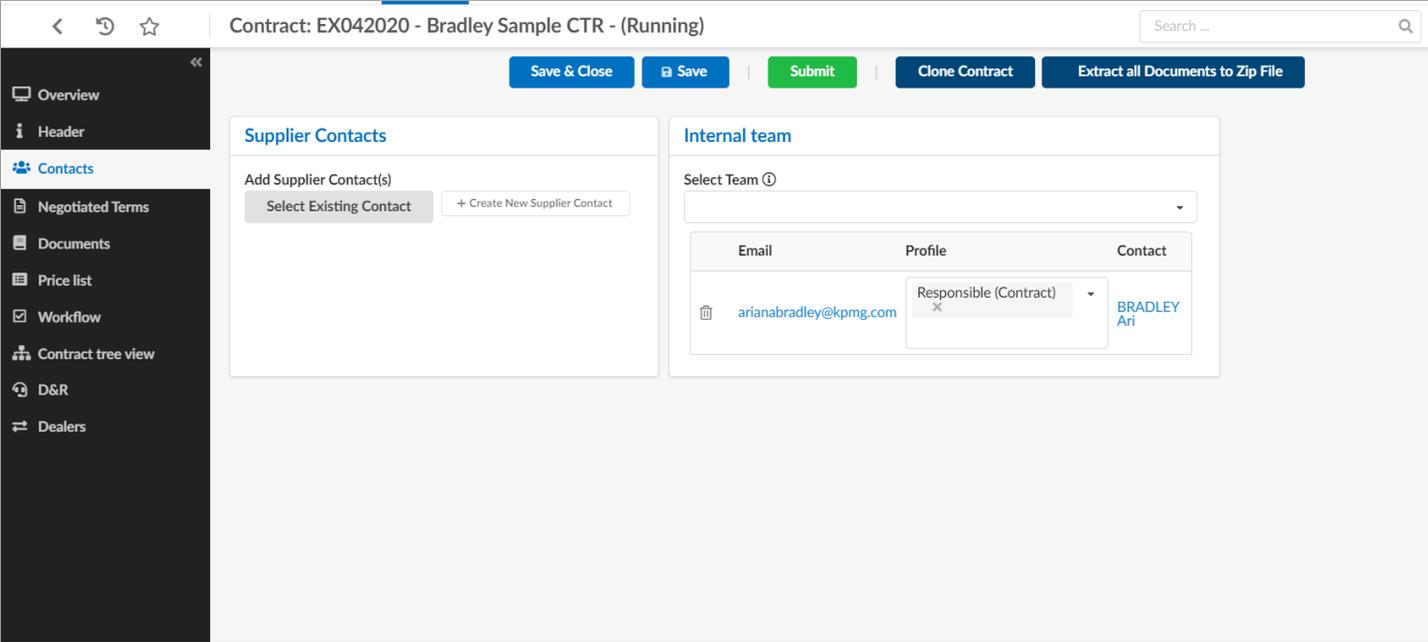
Contract Dates

<p>Award Date ⓘ</p> <input type="text"/>	<p>Effective Date *</p> <input type="text"/>
<p>Original End Date *</p> <input type="text"/>	<p>Current End Date</p> <input type="text"/>
<p>Max. End Date ⓘ</p> <input type="text"/>	<p>Min. Renewal Interval (in months) ⓘ</p> <input type="text"/>

<p>Expiration Notification</p> <p>Notification Date ⓘ <input type="text"/></p> <p>Notification Period (in months) ⓘ <input type="text"/></p>	<p>Termination</p> <p>Termination Date <input type="text"/></p> <p>Termination Justification <input style="width: 100%; height: 30px;" type="text"/></p>
---	---

Object	Definition	Additional Info
Notification Date	This is the date that a notification goes out to the Contractor or Supplier indicating that the contract is about to expire	If left blank, it will default with a date that is 6 months before the Original End Date or Current End Date
Notification Duration (months)	Minimum number of months notice that is required prior to termination or end of contract	This will be outlined within the contract terms. The notification will go out based upon the Original End Date or Current End Date , whichever is later.
Renegotiation Date	Date the contract terms were renegotiated	
Renegotiation Period (months)	Time period prior to the notice period set aside to renegotiate contract terms	
Renewal History	Outlines any actions taken on the contract (with dates and actors) where the agreement was renewed	
Renewal Period (months)	Number of months a contract is to be extended upon renewal	
Renewal Types	Indicates if a contract is eligible for renewal and, if so, whether that renewal can be automatic	

Contract Field Guide: Contract Contacts (1/1)



Object	Definition	Additional Info
Add Supplier Contacts	This section lists Supplier Contacts that are responsible for all activities related to this contract (e.g. renegotiation, renewal, notifications)	Contacts must be in entered into OhioBuys by the Supplier and must be assigned a role of "Contract Contact"
Select Team	This section lists internal contacts or State users responsible for all activities related to this contract	Each user is assigned a role or this particular contract: Responsible (Contract), Contributor/SME (Contract), Legal (Contract), Other Approver (Contractor), or Reviewer (Contract). There must always be one user listed as Responsible. Users with the Contributor/SME and Legal local profiles have editing rights, approvers can review and approve/reject, and reviewers can only view the contract. If multiple Other Approvers at a given level, or multiple Legal Approvers are assigned to the contract, all assigned approvers at that level must approve for the contract to advance.

Contract Field Guide: Negotiated Terms (1/2)

The screenshot shows a contract negotiation form with the following sections:

- Top Row:** Total Amount Incl. Tax, Estimated Contract Value, Currency (USD), Contract Not To Exceed.
- Second Row:** Revenue Share %, Fund Code, Only Accept Pcard Orders (checkbox), Contract Not to Exceed 2.
- Text Areas:** Delivery Terms, Warranty Terms, Complaint Process, Return Process, Choice Criteria.
- Payment Terms Section:** Payment Terms, Additional Payment Terms, Payment Type, Renegotiation Threshold, Price Terms, Invoicing Terms, Penalties, Payment Terms.
- Chart of Account Values Section:** Fund Code, Account, ALI, Department, Program, Grant/Project, Project, Reporting, Save Chart Account Values button.

Object	Definition	Additional Info
Additional Payment Terms	Outlines additional details related to the payment terms within the contract	Would correspond to a section within the signed contract. Example: Standard payment terms are Net60 except when the total order value is under a minimum threshold in which case the terms would be Net30
Payment Type	Outlines additional payment types if there are circumstances in which standard payment type would not apply	Would correspond to a section within the signed contract
Estimated Contract Value	Calculated total of contract based on contracted quantity x individual price point of items listed in Price List	Would correspond to a section within the signed contract
Choice Criteria	Any criteria outlined in the contract	Would correspond to a section within the signed contract
Complaint Process	Details how to process a complaint for the Supplier's overall performance or a specific order from the vendor	Would correspond to a section within the signed contract
Currency	Lists the currency the contract was negotiated in	Would correspond to a section within the signed contract
Delivery Terms	Lists any terms related to the delivery of goods on purchase orders	Would correspond to a section within the signed contract
Invoicing Terms	Lists any terms related to the billing of goods or services on purchase orders	Would correspond to a section within the signed contract
Payment Terms (drop down)	Lists the terms in which payments for invoices are to be remitted	Would correspond to a section within the signed contract. Example: Net30, Net45, Net60

Contract Field Guide: Negotiated Terms (2/2)

The screenshot shows a complex form for negotiating contract terms. It is organized into several sections:

- Top Row:** Total Amount Incl. Tax, Estimated Contract Value, Currency (set to USD), and Contract Not To Exceed.
- Second Row:** Revenue Share %, Fund Code (with a help icon), Only Accept Pcard Orders (checkbox), and Contract Not to Exceed 2.
- Text Areas:** Delivery Terms, Warranty Terms, Complaint Process, Return Process, and Choice Criteria.
- Payment Terms Section:** Includes dropdowns for Payment Terms and Additional Payment Terms, a dropdown for Payment Type, a text area for Renegotiation Threshold, a text area for Price Terms, a text area for Invoicing Terms, a text area for Penalties, and another text area for Payment Terms.
- Chart of Account Values Section:** A vertical list of dropdown menus for Fund Code, Account, ALI, Department, Program, Grant/Project, Project, and Reporting. A "Save Chart Account Values" button is located at the bottom of this section.

Object	Definition	Additional Info
Payment Type	Indicates the preferred method of remitting payment for this agreement	Would correspond to a section within the signed contract. Example: Cash, EFT, P-Card
Penalties	Outlines any penalties for violating the contract terms	Would correspond to a section within the signed contract
Price Terms	Outlines any stipulations to the agreed upon price(s) within the contract	Would correspond to a section within the signed contract
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	Would correspond to a section within the signed contract
Return Process	Outlines the terms of returning delivered goods in order to receive a reimbursement for the purchase	Would correspond to a section within the signed contract
Warranty Terms	Any warranties for the products in the contract	Would correspond to a section within the signed contract

Contract Field Guide: Contract Documents (1/1)

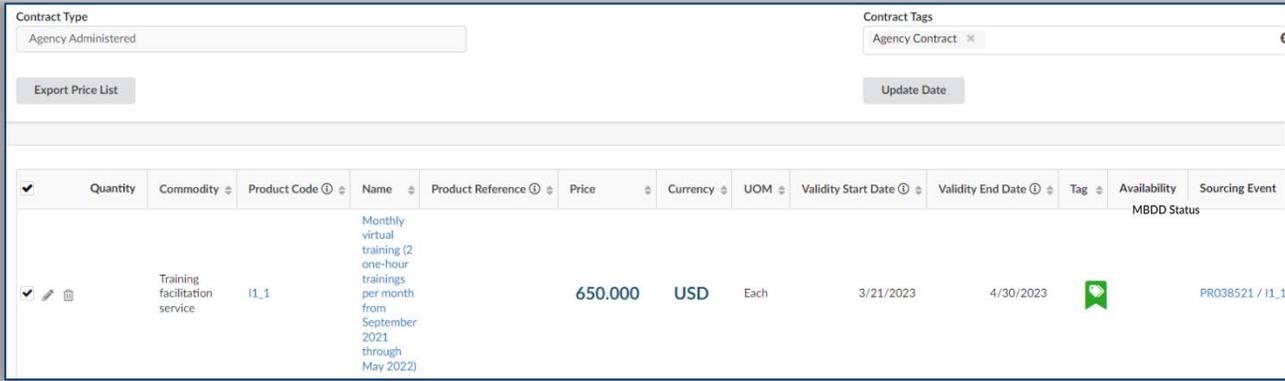
The screenshot shows a web interface for managing contract documents. At the top, there are action buttons: "Download Zip", "Create Signature Transaction", and a blue "Add" button with a dropdown arrow. Below this is a table with the following columns: Document Name, Version, Last Modified Date, Document Type, and Download. One record is visible with the following details:

Document Name	Version	Last Modified Date	Document Type	Download
Doc WFL Test- MJ	V1	3/27/2023	Main Contract Upgrade	

Below the table, there is a summary bar indicating "1 Record(s)" and a settings gear icon. The interface also features two expandable sections: "Electronic signature" and "Supplemental Documents". The "Supplemental Documents" section contains a "Create Document" button and a summary bar showing "0 Record(s)".

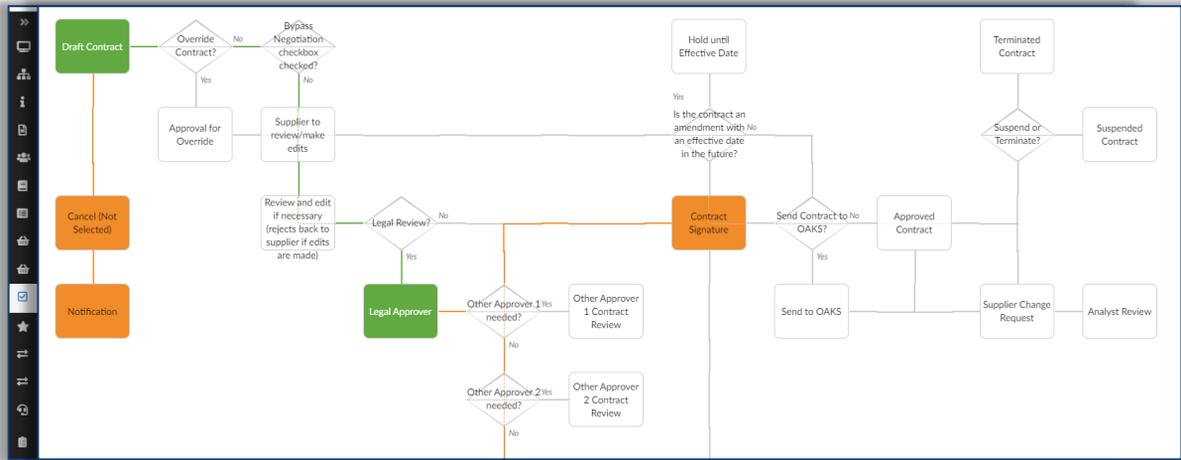
Object	Definition	Additional Info
Main Documents	This list contains various versions of the main contract document	Example: A natively authored contract document
Electronic Signature	This list contains uploaded documents related to the contract. If e-Signature is enabled, this section will contain a copy of the document that was authored in OhioBuys and then signed electronically	
Supplemental Documents	This list contains documents related to the main contract	

Contract Field Guide: Contract Pricelist (1/1)



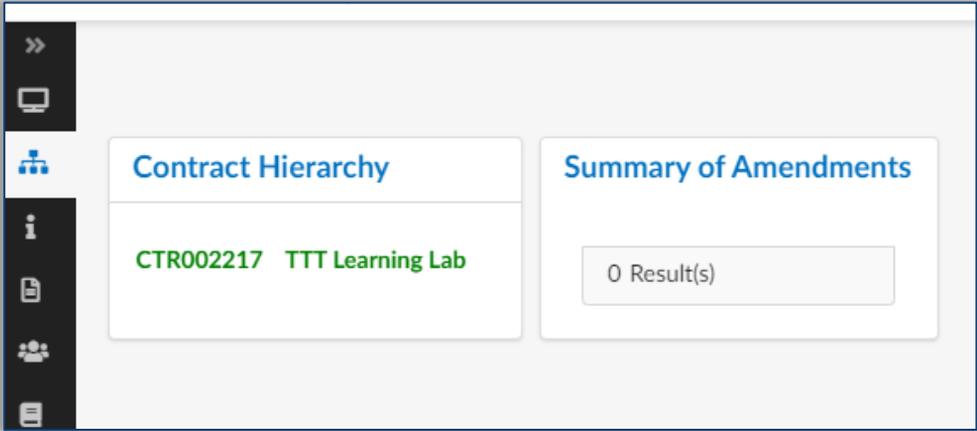
Object	Definition	Additional Info
Commodity	Indicates the commodity code for the item in the Price List	Aligns with UNSPSC naming convention
Contract Tags	Assigns a category or tag to the contract	Example: MBE Set-aside
Contract Type	Displays the contract type listed on the contract Header	
Currency	Displays the currency for the item in the Price List	
MBDD Status	Displays the status of the Supplier of the item in the Price List	
Index Number	Displays the number listed on the contract Header	
Link to Catalog	Displays a URL that links to the punchout catalog page for the item	
Name	Displays the name of the item	This name will be listed in bold when searching for the item on the Browse Items page
Price	Displays the unit price for an item	
Product Code	A unique code assigned to each item in the catalog. Product code should follow this format: take the contract number and sequentially add a number using the following format: [contract number]-[+1]. Ex. 800100-1, 800100-2, 800100-3.	If the contract number ends in a hyphen followed by a number (ex: 800100-1), use the following format [contract number]-[number]-[+1]. Ex. 800100-1-1, 800100-1-2, 800100-1-3.
Product Reference	Displays the manufacturer's part number	
State Contract Number	Displays the contract number assigned by the State vs. OhioBuys	
Tag	Displays the item tag	May or may not align with Contract Tag
UOM	Displays the unit of measure that in which the item can be purchased	
Validity End Date	Displays the date where State users will be able to purchase the item	Aligns with validity date for contract unless modified
Validity Start Date	Displays the last day State users will be able to purchase the item	Aligns with validity date for contract unless modified

Contract Field Guide: Contract Workflow (1/1)



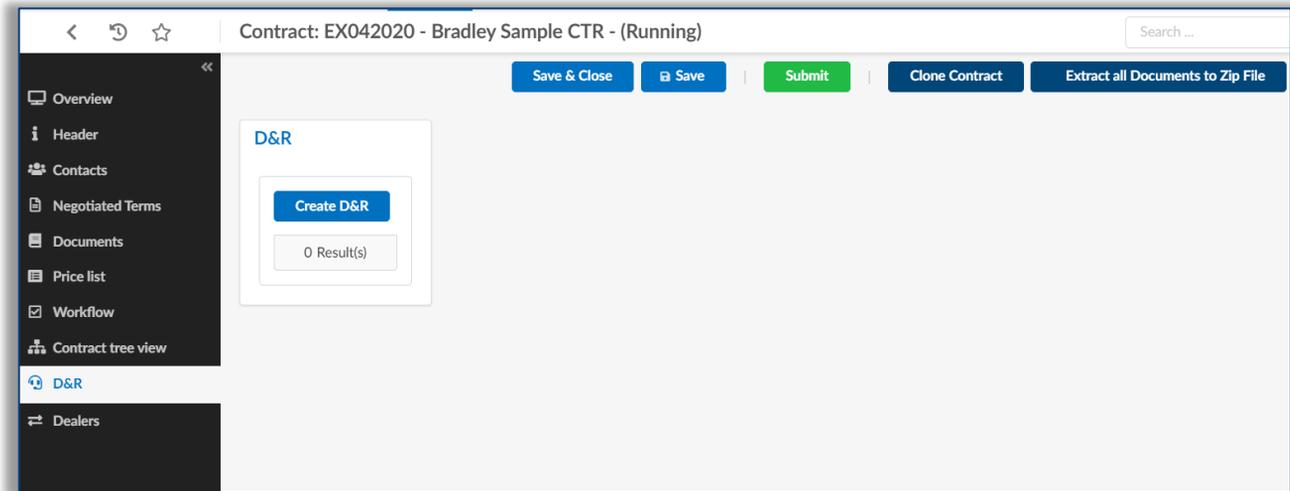
Object	Definition	Additional Info
Activity	Displays the step name within the workflow	
Click or Drag to add files	Allows user to upload attachments to be viewed by other approvers	
Comment	Allows user to enter comments prior to approval	
Created on (UTC-4)	Displays the date the contract reached a particular step within the workflow	
Delegate to	Displays the name of a State user who has had approval rights delegated to them	
Due Date (UTC-4)	Displays a due date for an approver, if applicable	
Initial performer	Displays the name of a State user that was automatically pulled into the workflow step to approve	
Mail History	Displays all communications coming out of OhioBuys for the contract	
Name	Displays the name of a State user that was automatically pulled into the workflow step to approve	
Previous Approvals & Refusal	Displays all previous approval paths taken by a document	Can give additional detail if a contract was rejected to show the path originally taken and rejection comments
Send to	Allows user to select a name to reference in conjunction with their comment in the Comments field	Does not send an email notification to the recipient of the comment
State	Displays the status of the step within the workflow	Orange = in progress, green = validated, red = rejected
Validated on (UTC-4)	Displays the date/time the step was validated	
Workflow Diagram	Displays the entire workflow for the contract	Orange = in progress, green = validated, red = rejected

Contract Field Guide: Contract Tree View (1/1)



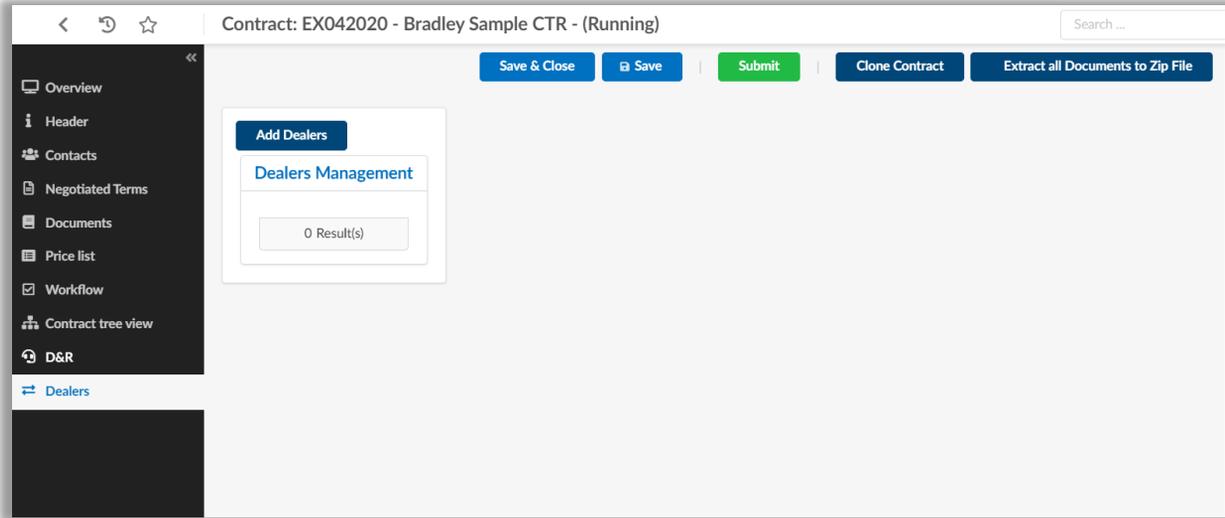
Object	Definition	Additional Info
Contract Hierarchy	Displays hyperlinks to any contract related to the current contract	Example: other sub-contracts beneath a master agreement
Summary of Amendments	Displays the history of actions taken to amend the original contract	

Contract Field Guide: Contract D&R (1/1)



Object	Definition	Additional Info
Create D&R	Lists all Determinations & Recommendations, if they exist. Allows the user to create a D&R from the contract.	All D&Rs are managed on a separate page under the “Suppliers” menu

Contract Field Guide: Contract Dealers (1/1)



Object	Definition	Additional Info
Add Dealers	Lists any Dealers that have been set up for this agreement. Allows the user to add new Dealers.	Dealers will serve as the Order Supplier during the purchase request process