

# The Office of Procurement Services



invites you to join them at the State Procurement User Group Meeting

When: March 12<sup>th</sup>, 2009, Registration begins at 8:30

Where: [4200 Surface Road, Columbus, Ohio 43228](#)  
Willow/Walnut Conference Center

## Topics of Discussion:

9:00 Welcome and Introductions

Mark Hutchison, Office of Procurement Services Contracts Manager

Managed Services - Bob Jonassen, OAKS Financial Applications Administrator

Check Ohio First - Wendy Boortz, Department of Development, Collaborations Coordinator  
Entrepreneurship and Small Business Division

Fatou Ndiaye, Procurement Technical Assistance Centers, Statewide Program Manager

Cost Per Copy- Diane Ford, Office of Procurement Services Copier Program Manager

Discount Payment Terms - Steve Hunter, Office of Procurement Services Administrator  
Gretchen Adkins, Office of Procurement Services, eProcurement Manager

Recycling - Steve Morbitzer, Office of Procurement Services, Procurement Manager

OAKS Coding Assets - Fred Zabonik, Asset Management Services, Assistant Program Manager

Using Contract to Create Requisitions in OAKS - Angie Stasiak, Office of Procurement Services

EOD - Requirements for IT set-aside Participation/OAKS certification

Todd McGonigle, Equal Opportunity Division

State Term Schedule - Pricing Provisions - Mo McGuire, STS Procurement Manager

IT Procurement - Requirements for Quotes and Requirements for MBE set-aside participation

Tom Hart, Office of Procurement Services, IT Procurement Services Manager

Purchasing Updates

Request to Purchase - Lauren Brown and Gretchen Adkins, Office of Procurement Services

Department of Administrative Services  
Office of Procurement Services

Welcome to SPUG

March 12<sup>th</sup>, 2009



# *Welcome and Introductions*

**Mark Hutchison**

**Procurement Services Contracts Manager**



# *OAKS Managed Services*

**Bob Jonassen**

**OAKS Financial Applications Administrator**



## What is Managed Service

Ohio is preparing for the next iteration of its Enterprise Resource Planning system – also known as an ERP -- by contracting with Accenture to operate OAKS through a managed services agreement. Day-to-day operations of the system's PeopleSoft applications, System infrastructure/hosting, application administration, reporting and technical support. Also, PeopleSoft-related system enhancements and other system development work will be performed by Accenture. The MS vendor will be managed with state leadership and business resources. The OAKS Leadership team will become the OAKS Service Assurance Team.

# The New OAKS Organization

The new OAKS Service Assurance team will be the focal point of the new Managed Service Organization. The new OAKS organization will be approximately 30 state staff

The roles of the new OAKS Org will be:

- Provide the Governance and Processes to make the new structure work
- Manage the contract and performance of the MS vendor
- Collaborate with the Business Functional teams to create business requirements based on functional needs
- Collaborate/Partner with Accenture to ensure work is done correctly and on agreed upon schedules
- Provide business procedures to ensure that work is prioritized by the business and is in alignment with the overall enterprise
- Manage UAT Testing and implementation of enhancements and fixes
- Manage Internal State SLAs

# Key Dates

- Feb 17<sup>th</sup> - Transition process begins
- Feb 17<sup>th</sup> - Accenture Transition team  
-onsite
- March 14<sup>th</sup> – Functional Team moves to  
moves back to Business (OBM/GSD)
- April 1<sup>st</sup> - New OAKS org filled out
- June 1<sup>st</sup> – Operational Readiness Testing
- July 1<sup>st</sup> - Accenture runs Application<sub>(approx)</sub>
- Sept 1<sup>st</sup> - Accenture runs Infrastructure

# Current Transition Activities

Transition Activities will include:

- Standardizing Business practices/policies/tools used by OAKS
- Updating & Forming Roles/Responsibilities
- Creating employee run Communication team
- Creating overall Communication/Change Mgmt plan
- Building Project Plan to manage all transition activities

# How it Will OAKS Service Assurance work?

- OAKS state resources in partnership with Accenture will provide governance and manage service and measure performance
- OAKS SA will collaborate with the Business to create requirements for fixes, enhancements, system changes .
- OAKS SA will work with business to prioritize approved development work and ensure that work is completed.
- OAKS SA will coordinate UAT testing and implementation schedules.

# Benefits

- Accenture MS experience
- Accenture PS experience and Expertise
- Contract includes incentives and penalties to ensure top service
- Cost Avoidance of \$6M
- System Stability
- System/Application Governance
- Structured processes for development.
- Tools that promote Transparency and performance
- Established Incident Management



Department of  
Development



**Wendy Boortz**

Team Leader

**Check Ohio First**

Entrepreneurship and Small  
Business Division

**614-466-0043**

614-466-2718

**[Wendy.Boortz@deve  
lopment.ohio.gov](mailto:Wendy.Boortz@development.ohio.gov)**

**Fatou Ndiaye**

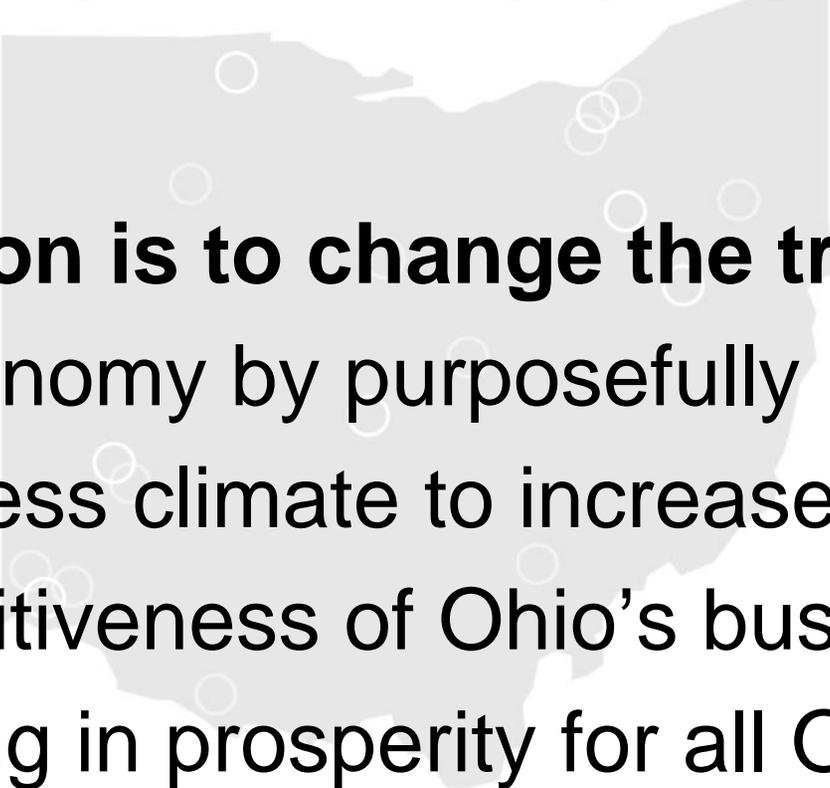
Statewide Program Manager

**Procurement Technical  
Assistance Centers**

**614.644.1637**

**[Fatou.Ndiaye@develo  
pment.ohio.gov](mailto:Fatou.Ndiaye@development.ohio.gov)**

# OUR MISSION

A light gray map of the state of Ohio is centered in the background. Overlaid on the map are several white circles of varying sizes, some of which are overlapping, suggesting a network or data points.

**Our Mission is to change the trajectory of Ohio's economy by purposefully redesigning the business climate to increase the global competitiveness of Ohio's businesses, resulting in prosperity for all Ohioans.**

## **Entrepreneurship and Small Business Division**

**Our Mission is to provide innovative programs and services to Ohio entrepreneurs and small business owners, through effective communication, collaboration, creativity and technology support, to encourage sustainable growth**

Ohio First

## Maximize the use of Ohio businesses when making purchases

- **On-line directory of Ohio businesses**

Linked to Business, State & Local Procurement Opportunities

- **Matchmaker Events**

Business to Government and Business to Business

- **Small business support**

Direct outreach to women, minority, veteran and EDGE enterprises



Department of  
Development

## 2009 Ohio Business Matchmaker



Where Government and Business  
Come Together

March 18, 2009 from 8:00 a.m. – 4:00 p.m.  
Wright State University, Nutter Center  
Dayton, Ohio 45435

- **Over 1000 small business sellers**, including veteran-, minority- and women-owned businesses.
- **More than 150 buyers** will be on hand for one-on-one meetings with small businesses. Buyers are from city, state, county, and federal agencies, as well as prime contractors and other organizations with combined purchasing budgets representing hundreds of millions of dollars worth of opportunities.

# Procurement Technical Assistance Centers

- Department of Defense (DLA)



- Ohio Dept of Development (ODOD)

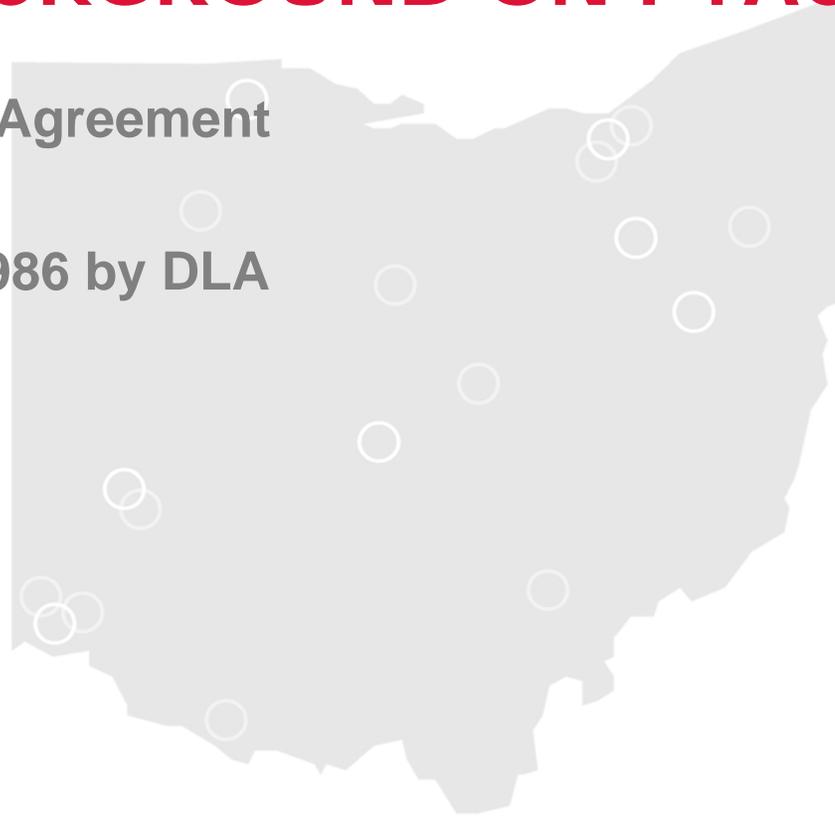
**Ohio**

Department of  
Development

Local Non Profit Organizations

## BACKGROUND ON PTAC

- Cooperative Agreement
- Initiated in 1986 by DLA



# MISSION

- Provide contracting assistance to businesses pursuing work with:



Federal Agencies  
State and Local Governments  
Educational Institutions  
Public Authorities  
Prime Contractors

- Help businesses find opportunities

## PTAC in OHIO

- There are nine (9) PTAC offices located
  - in the State of Ohio:
    - Athens
    - Cincinnati
    - Columbus
    - Cleveland
    - Dayton
    - Kent
    - **\*\*South Point\*\***
    - Toledo
    - **\*\*Youngstown\*\***

## HOW CAN SMALL BUSINESSES HELP AGENCIES?

### NOTE:

Large Prime Contractors must make an effort to meet set-aside goals as well.

- Set-Aside Laws:

- Small Business = 23%
- HUBZone SB = 3%
- 8(a) Small Business = 3%
- Service Disabled Veteran-owned Small Business = 3%

### Set-Aside Goals:

- Woman-owned SB Goal = 5%
- Veteran-owned SB Goal = 3%

## **SOME SERVICES FROM PTAC**

How we get businesses ready for work...

Review Registrations / Recommend Revisions

Daily Bid Match/Bid Review

Marketing/Sales Discussion

Government Specific Marketing Tools

Define Target Market(s)

Advanced Help: FAR, Mil-Spec, RFID, UID, Procurement Histories, etc...

# State Programs & Policy



- **Support of (Lieutenant) Governor**
- **Bring current state programs under one umbrella**
  - Check Ohio First, Buy Ohio, Think Ohio First, Ohio Proud, Ohio Knowledge Bank
- **Connect Businesses and State Agencies**
  - Post or link to state procurement opportunities
  - Facilitate connections with vendors to meet Buy Ohio and Think Ohio (set aside) goals

# Set Asides

Executive Order 2008-135 Yearly Performance Scorecard  
Fiscal Year Ending 2008

Fiscal Year - 2008	State of Ohio MBE Program Results (Goal 15%)						
	Eligible Exp.	Set Aside Exp.	Set Aside %	Participation Expenditures	Participation Expenditures %	MBE Total Exp.	Total Exp. %
<b>Cabinet Agencies</b>							
Board of Regents	\$2,037,451	\$0,000	1.74%	\$24,509	0.65%	\$75,695	2.39%
Bureau of Workers' Compensation	\$56,662,895	\$87,705	0.15%	\$192,423	0.33%	\$283,221	0.48%
Department of Administrative Services	\$61,500,603	\$260,516	0.42%	\$380,337	0.67%	\$741,383	1.21%
Department of Agms	\$3,204,000	\$229	0.01%	\$0	0.00%	\$229	0.01%
Department of Agriculture	\$7,375,669	\$35,046	0.46%	\$5,472	0.07%	\$40,518	0.55%
Department of Alcohol and Drug Addiction Services	\$1,910,931	\$600	0.04%	\$8,217	0.43%	\$8,607	0.47%
Department of Commerce	\$14,301,673	\$703,410	4.89%	\$47,167	0.33%	\$750,577	5.23%
Department of Development	\$11,140,514	\$88,434	0.78%	\$0	0.00%	\$88,434	0.78%
Department of Health	\$80,141,050	\$465,741	0.58%	\$611,732	0.76%	\$808,964	1.01%
Department of Insurance	\$4,086,194	\$2,734	0.07%	\$64	0.02%	\$3,598	0.09%
Department of Job and Family Services	\$195,548,635	\$520,413	0.42%	\$1,860,216	0.95%	\$7,089,889	3.58%
Department of Mental Health	\$36,257,262	\$237,277	0.64%	\$149,754	0.41%	\$381,031	1.04%
Department of Mental Retardation and Developmental Disabilities	\$30,021,854	\$870,733	2.88%	\$95,123	0.33%	\$1,066,856	3.53%
Department of Natural Resources	\$30,114,194	\$229,354	0.74%	\$73,306	0.24%	\$302,660	0.99%
Department of Public Safety	\$74,084,275	\$44,138	0.06%	\$919,474	1.23%	\$1,363,612	1.83%
Department of Rehabilitation and Correction	\$162,504,378	\$820,472	0.51%	\$1,383,705	0.85%	\$2,216,770	1.34%
Department of Taxation	\$15,575,190	\$90,540	0.54%	\$397,532	2.50%	\$417,072	2.65%
Department of Transportation	\$132,526,055	\$5,540,065	4.17%	\$1,405,643	1.06%	\$6,787,386	5.10%
Department of Youth Services	\$23,072,835	\$102,852	0.45%	\$30,245	1.35%	\$483,307	2.10%
Environmental Protection Agency	\$27,342,460	\$19,781	0.07%	\$790,460	2.89%	\$962,241	3.50%
Lifeline Commission	\$54,583,733	\$1,147,034	2.10%	\$11,100	0.02%	\$9,168,134	16.70%
Office of Budget and Management	\$2,472,782	\$789,706	3.19%	\$226,956	9.16%	\$350,266	14.16%
<b>Cabinet Agencies Totals</b>	<b>\$1,839,316,163</b>	<b>\$16,473,692</b>	<b>0.89%</b>	<b>\$8,713,033</b>	<b>0.44%</b>	<b>\$25,186,625</b>	<b>1.36%</b>
<b>College &amp; Universities</b>							
Arcis	\$27,329,131	\$1,239,638	4.54%	\$0	0.00%	\$1,239,638	4.54%
Baylor Green	\$14,146,894	\$1,050,633	7.43%	\$0	0.00%	\$1,050,633	7.43%

## How Can We Help?

**Wendy Boortz**

Team Leader

**Check Ohio First**

Entrepreneurship and Small  
Business Division

**614-466-0043**

614-466-2718

**[Wendy.Boortz@deve  
lopment.ohio.gov](mailto:Wendy.Boortz@development.ohio.gov)**

**Fatou Ndiaye**

Statewide Program Manager

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# Diane Ford

Office of Procurement Services

Copier Program Manager

save  
~~Cost - Per - Copy~~  
Program



Check us out on the Web at:  
<http://gsdprint.das.ohio.gov/prt.html>  
or  
<http://ohio.gov/procure>



Cost-Per-Copy (CPC) Program Contact  
Diane Ford, Copier Program Manager  
614.644.6365 or [diane.ford@das.state.oh.us](mailto:diane.ford@das.state.oh.us)



## Multi-Function Print Devices

CATEGORY	TYPE	MINIMUM SPEED	MONTHLY VOLUME RANGE	MONTHLY MINIMUM
1	b/w	25	1,000 – 4,999	1,000
2	b/w	30	5,000 – 9,999	5,000
3	b/w	35	10,000 – 14,999	10,000
4	b/w	40	15,000 -19,999	15,000
5	b/w	45	20,000 – 24,999	20,000
6	b/w	50	25,000 – 49,999	25,000
7	b/w	55	50,000 – 74,999	50,000
8	b/w	60 - max. 65	75,000 – 100,000	75,000
9	color	25 Color / 20 B/W	Color: 1,000 – up B/W: 1,000 – up	Color: 1,000 B/W: 1,000
10	color	35 Color, 20 B/W	Color: 1,000 – up B/W: 10,000 – up	Color: 1,000 B/W: 10,000
11	color	35 Color, 20 B/W	Color: 1,000 – up B/W: 20,000 - up	Color: 1,000 B/W: 20,000

## Single-Function Print Devices

CATEGORY	TYPE	MINIMUM SPEED	MONTHLY VOLUME RANGE	MONTHLY MINIMUM
12	b/w	25	1,000 – 4,999	1,000
13	b/w	30	5,000 – 9,999	5,000
14	b/w	35	10,000 – 14,999	10,000
15	b/w	40	15,000 -19,999	15,000
16	b/w	45 - max. 55	20,000 – 24,999	20,000
17	color	25 Color / 20 B/W	Color: 1,000 – 2,499 B/W: 1,000 -2,499	Color: 1,000 B/W: 1,000
18	color	35 Color, 20 B/W	Color: 2,500 – 4,999 B/W: 2,500 – 4,999	Color: 2,500 B/W: 2,500

<b>Contractor</b>	<b>Brand</b>	<b>Categories List</b>
Cannon IV	HP	13,14,15,16,17,18
Canon USA	Canon	1,2,3,4,5,7,10,11 12,13,14,15,16,17,18
ComDoc	Lexmark	12,17,18
ComDoc	Sharp	1,2,3,4,5,6,7,8,9,10
Konica Minolta	Konica Minolta	1,3,8,9,10,11
Kyocera Mita	Kyocera	6,12,13,14,15,16
Oce	Oce	1,2,3,4,5,6,7,8,9,10,11
Resource One	LaserJet	2,12
Sharp	Sharp	11,13,14,15,16
Xerox	Xerox	4,5,6,7,8,9,12,13 14,15,16,17,18

# *Discount Payment Terms*

**Steve Hunter**

**Office of Procurement Services  
Administrator**

**Gretchen Adkins**

**Office of Procurement Services  
eProcurement Manager**



# DAS Term Contracts

# Payment Terms

**Gretchen Adkins, CPPO**  
**Procurement Manager**  
**State Purchasing**



**Steve Hunter, CPPO**  
**Administrator**  
**State Purchasing**

## **LATE BILL PAYMENTS COST STATE**

“Even as the state was closing mental hospitals and slashing state spending last year to keep the budget balanced, it paid **\$121,585** in interest to vendors because state agencies didn’t pay their bills on time, records show”.

The Columbus Dispatch  
February 22, 2009  
By Mark Niquette



# Payment Terms



**1% - 10 Days, Net 30**

**3% - 25 Days, Net 30**

**2% - 10 Days, Net 30**

**2% - 10 Days, Net 31**

**3% - 10 Days, Net 30**

**3% - 15 Days, Net 30**

# First Aid Kits & Medical Supplies

2% - 10 Days, Net 30

\$236,743.83	(\$4,734.88)
<u>\$ 4,438.92</u>	<u>(\$ 88.79)</u>
\$241,182.75	(\$4,867.67)

# Distribution of Liquor & Bags

2% - 10 Days, Net 30

\$433,852.34	(\$ 8,677.05)
\$689,830.22	(\$13,796.60)
<hr/>	<hr/>
\$241,182.75	(\$22,473.65)

# Review Contract Supplier Page Special Payment Terms

Index No. GDC102V  
Rev. 05/28/08  
Page 46

## CONTRACTOR INDEX

### CONTRACTOR AND TERMS:

72270  
Seneca Medical Inc.  
85 Shaffer Park Dr.  
Tiffin, OH 44883

CONTRACTOR'S CONTACT: Jeff Shuey , ext. 228

CONTRACTOR'S IT/MIS CONTACT: Keith Price,

ITEM ID NO.: 72270, Freight charges on orders totaling less than \$100.00.

BID CONTRACT NO.: OT900305-3 (06/30/09) \*

DELIVERY: 14-30 Days A.R.O., as specified

TERMS: 2% 10 Days, Net 30

Toll Free: (800) 447-0225  
Telephone: (419) 447-0222  
FAX: (419) 447-7202

E-mail: jshuey@senecamedical.com

Telephone: (419) 447-0222, ext 215

87284  
Tetra Medical Supply Corp.  
6364 W. Gross Point Rd.  
Niles, IL 607141-3916

CONTRACTOR'S CONTACT: Barbara Hoffman

BID CONTRACT NO.: OT900305-5 (06/30/09) \*

DELIVERY: 14-30 Days A.R.O., as specified

TERMS: 2% 10 Days, Net 30

Toll Free: (800) 621-4041

# Change Payment Terms = 2% - 10 Days, Net 30 (based on terms on contract)

[Comments](#)

[Advanced Vendor Search](#)

\*Pay Terms: **Net 30** 

Control Group:  

Copy from a Source:

PO Unit:

Invoice Lines

Line \*Distribu

1 Amount  

Ship To  SpeedChart  Use On Account

Basis Dt Type: Invoice Date

Accounting Date:  

\*Currency:  

Purchase Order:    Worksheet Copy Option:

Line	*Distribu	Description	Quantity	UOM	Unit Price	Extended Amount
1	Amount	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	400.00

# Next Steps

- ✓ **DAS Standard Payment Terms = 2% - 10 Days, Net 30**
- ✓ **Review DAS Contracts for Payment Terms**
- ✓ **Take Advantage of Discounts – Communicate the Contract Terms to Accounts Payable staff.**

# Recycle

reclaimable: capable  
of being used again



**Steve Morbitzer**  
**Procurement Manager**

Office of Procurement Services

# Why Recycle?

Save landfills  
Conserve natural resources  
Conserve energy  
Reduce pollution  
Add/Retain jobs

*Recycling one aluminum can saves enough energy to power a computer for 3 hours.*

*Keeping recyclable items out of our landfills keeps air and water cleaner*

*Americans throw away enough aluminum every month to rebuild our entire commercial air fleet*

As of 2000, almost 100,000 jobs in Ohio were directly dependent on recycling; Ohio recycling resulted in \$22.5 billion in sales and an annual payroll of \$3.6 billion. (Ohio ODNR/DRLP)



# Facts and Figures

*A full bath tub requires about 70 gallons of water, while taking a five-minute shower uses only 10 to 25 gallons.*

*Recycling 1 ton of paper saves 17 mature trees, 7,000 gallons of water, 3 cubic yards of landfill space, 2 barrels of oil, and 4,100 kilowatt-hours of electricity — enough energy to power the average American home for five months.*



In 2007, 254 million tons of municipal solid waste was generated. Commercial solid waste, which includes public entities, makes up about 40% of that number; or 102 million tons.

Out of the 102 million tons, approximately 33 million tons is paper.

Americans are currently recycling about 54% of that paper.

Our landfills are running out of space. In 2003 more than 39 million tons of trash was exported to another state for disposal. At that time this number was increasing by about 11% per year.

# Facts and Figures

Example:

Franklin County facility with a 42 cubic yard compactor disposing of 6 cubic yards once per week in a self-contained compactor---

Combining cost per pull, monthly rental and landfill cost, one facility can save as little as \$ 8130.00 per year by recycling just paper products. Consider the savings if other commodities are recycled as well.

Monthly Rental = \$564.15 times  
12=\$6769

Cost Per Pull \$135.00 times 52  
pulls = \$7020

6 tons times 52 weeks = 312 tons  
per year times \$35.50 per ton =  
\$11076

$6769+7020+11076=24,865$

$24,865*32.7%=\$8130$  potential  
savings



## History

In 2008 OSP issued a statewide bid for various commodities. Only 8 bids received for a total of 9 commodities. Only 34% of all counties received bids.

Bids received were not acceptable and bid was cancelled. Follow-up with the Bidders revealed that the Bid was too complicated, too many unknown variables, and the scope was too broad.

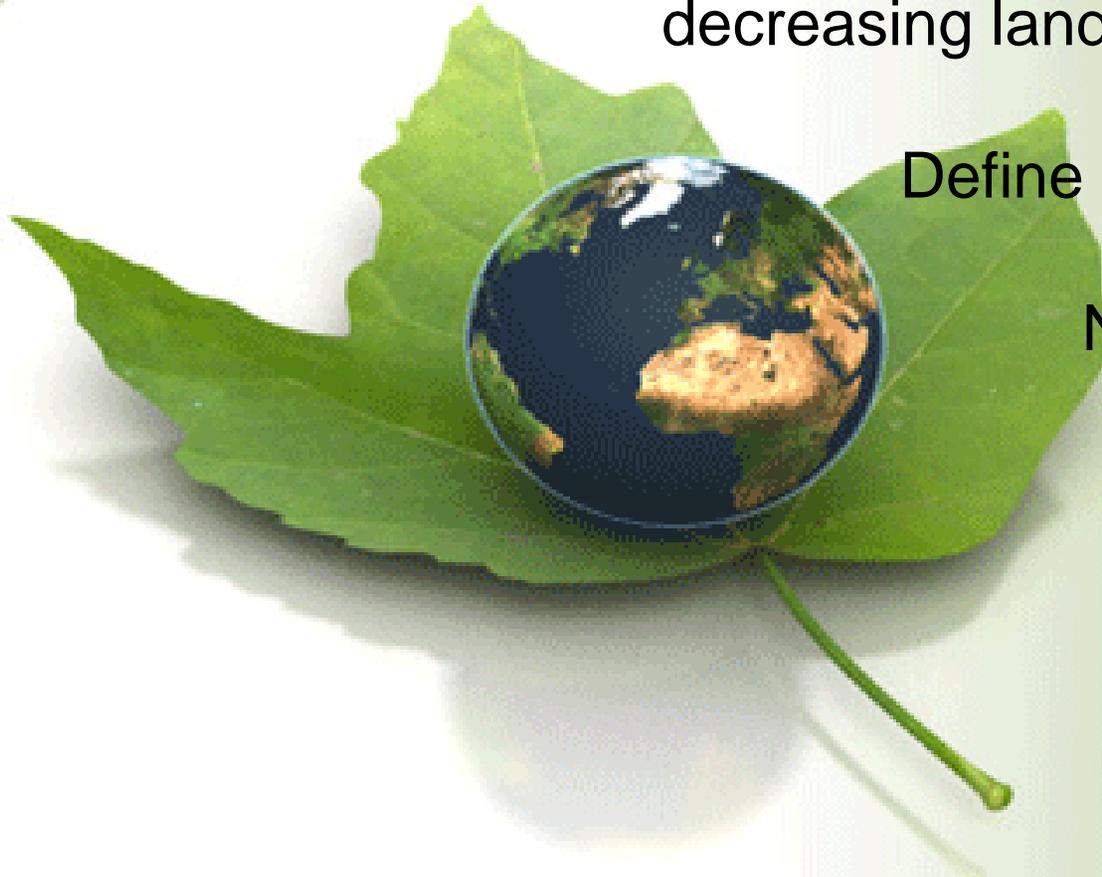
# Lessons Learned

Have accurate data and statistics

Know the market-revenue generating vs. decreasing landfill

Define the scope

Narrow the commodities



# Where do we go from here?

New ODOT Bid for universal waste only being issued this month.

Bid is structured to add more commodities and agencies as needed/desired.

Agencies will have to provide data of estimated usage and pickup locations prior to issuing a bid for their facilities. Once data is received, specifications will be written and then Bid.

Our intent is to look at paper and cardboard during 2009.

To make this a success, we need to gather as much information that is available. We need your help.

# Survey

Please complete the attached survey and return to Gayle Blankenship. As soon as the information is gathered we will begin working towards a bid for this commodity.

Timing and success will depend largely on the quality of the data received.



# Survey

Return to: Gayle Blankenship Office of Procurement Services 4200 Surface Road, Columbus, OH 43228  
(614) 644-1785 fax

Agency: \_\_\_\_\_ Name: \_\_\_\_\_

Does your agency currently recycle? \_\_\_\_\_ If no, is there any interest and if so, which commodities? \_\_\_\_\_

If yes, which commodities? \_\_\_\_\_

Are you currently receiving reimbursement for these items or cost savings through a reduction in disposal cost?

How much solid waste (in tons) is currently disposed of from your facility in one month? \_\_\_\_\_

Are you in a secure gated area? \_\_\_\_\_

Do you have building restrictions which limit your ability to recycle? \_\_\_\_\_

If available, would you be interested in free disposal of these materials if you delivered all items to a centralized point?

What prohibits you from recycling today if you are not currently doing so?

Comments?

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# *OAKS Coding Assets*

**Fred Zabonik**

**Asset Management Services  
Assistant Program Manager**



## Adding a Category Code:

When making a requisition either by catalogue or special request, make sure to update the asset information. When purchasing equipment, the Profile ID must be populated for the record to be integrated to the Asset Management module.

**OAKS Financials**

Home | Worklist | Add to Favorites | Sign out

**Menu**

- Vendors
- Purchasing
- eProcurement
  - Create Requisition**
  - Manage Requisitions
  - My Profile
- Services Procurement
- Accounts Receivable

**Create Requisition**

Settings → Find Items → Modify Shipping → Modify Accounting → Review and Submit

Search:

Catalog | Favorites | Templates | Forms | Web | **Special Request**

**Special Request - Order Goods and Services Not Available in Item Catalogs**

\*Description:

\*Category:

\*Price:

\*Qty:

Vendor ID:

Mfg ID:

Due Date:

\*Currency:

\*Unit of Measure:

Additional Information:

Send to Vendor

**Requisition Summary**  
There are no lines on this request.  
Please add new line in order to save this requisition.  
Total Lines: 0  
Total Cost (USD): 0

## Adding AM information on a requisition:

To get to this screen go to: eProcurement > Create Requisition  
Once you enter the items to purchase, go to the Review & Submit page, scroll to the right, click the truck icon, then click the split distribution icon. Open the Asset Information tab and check here to see if the Business Unit and Profile ID are populated.

**OAKS Financials**

Home | Worklist | Add to Favorites | Sign out

[New Window](#) | [Help](#)

**Menu**

- eProcurement
  - Create Requisition
  - Manage Requisitions
  - My Profile
- Services Procurement
- Accounts Receivable
- Accounts Payable
- Asset Management
- Commitment Control

**Edit Requisition**

[Settings](#) → [Find Items](#) → [Modify Shipping](#) → [Modify Accounting](#) → [Review and Submit](#)

**Requisition Line Number 1**

Description: 30,000 AGR 0259 SMALL ANIMAL CERIFICATE OF VETERINARY INSPECTION      Quantity: 1.0000      Price: 1,825.32000 USD

**Schedule Number 1**

Ship To: AGR ANIMAL      \*Distribute by: Qty      Quantity: 1.0000  
Due Date: 03/25/2009      Speedchart      Open Quantity: 1.0000  
\*Liquidate by: Qty      Total: 1,825.32 USD

**Requisition Summary**

Description	Qty	UOM
30,000 AGR 0259 SMALL ANIM...	1	AMT

Total Lines: 1  
Total Cost (USD): 1,825.32

**Distribution Details**      [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

**Asset Information**

Business Unit	Profile ID	Tag Number	CAP #	Sequence	EmplID	Capitalize Activity	Cost Type
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>					

OK      Cancel

## Adding AM information on a PO:

To get to this screen go to: Purchasing > Purchase Orders > Maintain Distributions

Use the search fields to look up the PO. Open the Asset Information tab and check here to see if the Business Unit and Profile ID are populated.

The screenshot shows the OAKS Financials interface. On the left is a navigation menu with 'Purchase Orders' expanded to 'Maintain Distributions'. The main content area displays details for a purchase order line item. The 'Asset Information' tab is active, showing search fields for 'AM Unit' and 'Profile ID', which are circled in red. Below the search fields are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

Dist	Status	AM Unit	Profile ID	CAP #	Sequence	Taq Number	EmplID	Capitalize	Cost Type	Desc
1	Open	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>						

**Time for a Break...**



**Please Return in 10 Minutes**

# *OAKS Updates*

**James Yagodich**  
**Management Analyst and Trainer**



# *Using Contracts to Create Requisitions in OAKS*

**Angie Stasiak**  
Office of Procurement Services



# State Procurement Website

## www.ohio.gov/procure

The screenshot shows the Ohio State Procurement website in a Windows Internet Explorer browser window. The browser's address bar displays the URL <http://www.procure.ohio.gov/proc/index.asp>. The website header features the Ohio.gov logo with the tagline "So much to Discover!" and the text "State Procurement". Below the header, there are four navigation tabs: "for Contractors/Vendors", "for Government Entities", "for State Employees", and "for the Public". The main content area is titled "State Procurement" and features a large red "P" logo. To the right of the logo are three buttons: "What's New HELP", "Selling to the State HELP", and "Current Contracts HELP". Below the logo, a paragraph of text reads: "The State of Ohio Procurement Web site displays all procurement opportunities and supplies and services contract information administered by the Ohio Department of Administrative Services (DAS). These agencies issue all major procurement opportunities and negotiate all contracts displayed unless otherwise noted." On the left side, there is a vertical menu with the following items: "OAKS Information", "What's New", "Selling to the State", "Current Contracts", "Find It Fast", "Procurement Contacts", "Help & Reference Materials", "FAQ", "Forms", "Web Links", "Comments/Questions", and "Training/Tutorials". At the bottom of the page, there is a footer with links: "state home", "OIT home", "DAS home", "site map", "contact DAS", "search Ohio.gov", and "privacy policy". The browser's taskbar at the bottom shows the Windows start button, several open applications, and the system clock displaying 8:53 AM.

# Find it Fast

The screenshot shows a web browser window displaying the Ohio.gov Procurement website. The browser's address bar shows the URL <http://www.procure.ohio.gov/proc/findItFast.asp>. The website header features the Ohio.gov logo with the tagline "So much to Discover!" and the text "State Procurement". Below the header, there are four navigation tabs: "for Contractors/Vendors", "for Government Entities", "for State Employees", and "for the Public".

The main content area is titled "Find It Fast" and includes a large red "P" logo. A text block explains: "Find it Fast is a quick way to find an opportunity or contract. To find an opportunity or contract choose a Type and enter a complete or partial number. Use the [Current Contracts](#) or [Procurement Opportunities](#) functions for a more detailed search."

The "Find It Fast:" section contains three steps:

- Step 1: Select the Type** with radio button options for "Doc/Bid/Schedule #" and "Index Number".
- Step 2: Enter the Number** with a text input field containing "GDC004".
- Step 3: Press the Button** with a "Find It Fast" button.

A blue box highlights the "Find It Fast" link in the left-hand navigation menu. At the bottom of the page, there is a footer with links for "state home", "OIT home", "DAS home", "site map", "contact DAS", "search Ohio.gov", and "privacy policy". The Windows taskbar at the bottom shows the Start button, several open applications, and the system clock at 12:11 PM.

# Keyword Search for Contracts

The screenshot displays a Windows Internet Explorer browser window with the URL <http://www.procure.ohio.gov/proc/currentContracts.asp>. The page features the Ohio.gov logo and navigation tabs for Contractors/Vendors, Government Entities, State Employees, and the Public. A sidebar on the left lists various procurement-related links. The main content area is titled "Current Contracts" and includes three search options: "Search Using the Alpha List", "Search by Contract Type", and "Search Using a Keyword". The "Search Using a Keyword" option is highlighted with a blue box and contains the following steps:

**Search Using a Keyword** [HELP](#)

**Step 1 - Enter contract specific keywords**  
Temporary Personnel Services

**Step 2 - Select a keyword search method**

- Matches on ANY word
- Matches on ALL words
- Match these words as an "exact phrase"

The Windows taskbar at the bottom shows the Start button, several open applications (Inbox, State Pr..., G:\STAF..., SPUG C...), and the system clock at 12:20 PM.

# Revised Contract Link Contains All The Amendment Changes

The screenshot shows a Windows Internet Explorer browser window displaying the Ohio State Procurement website. The address bar shows the URL: <http://www.procure.ohio.gov/proc/viewContractsAwards.asp?contractID=10649>. The page header includes the Ohio.gov logo and the text 'State Procurement'. Below the header, there are navigation links for 'Contractors/Vendors', 'Government Entities', 'State Employees', and 'the Public'. The main content area is titled 'Details for: Temporary Personnel Services'. It includes sections for 'General Information', 'Dates', 'Procurement Program', and 'Associated PDF Files'. The 'Associated PDF Files' section contains links for 'Original Contract', 'Revised Contract', and 'Terms and Conditions'. The 'Revised Contract' link is highlighted, indicating it contains all amendment changes. The browser's taskbar at the bottom shows the start button and several open applications, including an email client and a file explorer.

**View Contract Details - Windows Internet Explorer**

http://www.procure.ohio.gov/proc/viewContractsAwards.asp?contractID=10649

File Edit View Favorites Tools Help

View Contract Details

**Ohio.gov**  
So much to Discover!

**State Procurement**

for Contractors/Vendors for Government Entities for State Employees for the Public

**Details for: Temporary Personnel Services**

**General Information**

**Contract Type:** Awarded Invitation to Bid  
**Contract Status:** Amended  
**Commodity Category:** Administrative, Financial, Managerial, Courier, Insurance & Temp Svcs  
**Contract#:** OT903309  
**Index Number:** GDC004G  
**Vendor(s):** [Click to View](#)

**Dates**

**Effective Date:** 11/1/2008  
**Expiration Date:** 10/31/2011

**Procurement Program**

**Open Solicitation:** Yes  
**Open to Co-op:** Yes

**Associated PDF Files**

**Amendment/Addenda:**  Select a number to view the information  
**Original Contract:** [Click to View ORIGINAL CONTRACT](#)  
**Revised Contract:** [Click to View REVISED CONTRACT](#)  
**Terms and Conditions:** [Click to View TERMS & CONDITIONS](#)

[Back to Previous Page](#)

state home OIT home DAS home cito map contact DAS search Ohio.gov privacy policy

start | Inbo... | State... | G:\ST... | SPUG... | SPUG... | View ... | Search Desktop | 11:37 AM

# Review the Contract

OT904406 DMH017 Rev.doc - MICROSOFT WORD

File Edit View Insert Format Tools Table Window Help Adobe PDF Acrobat Comments

Normal + Justif Arial 9 B I U

Index No.: DMH017S  
Rev.: 07/01/08  
Page No.: 1

STATE OF OHIO  
DEPARTMENT OF ADMINISTRATIVE SERVICES  
GENERAL SERVICES DIVISION  
OFFICE OF PROCUREMENT SERVICES  
4200 SURFACE ROAD, COLUMBUS, OH 43228-1395

**REQUIREMENTS CONTRACT: GERMICIDAL DISINFECTANT AND SANITIZER DETERGENTS**

CONTRACT No.: OT904406

EFFECTIVE DATES: 10/01/05 to 09/30/08  
Renewal through 09/30/09

The Department of Administrative Services has accepted bids submitted in response to Invitation to Bid No. OT904406 that opened on 09/07/05. The evaluation of the bid response(s) has been completed. The bidder(s) listed herein have been determined to be the lowest responsive and responsible bidder(s) and have been awarded a contract for the item(s) listed. The respective bid response, including the [Terms and Conditions for Bidding](#), [Standard Contract Terms and Conditions](#) and [Supplemental Contract Terms and Conditions](#), special contract terms & conditions, any bid addenda, specifications, pricing schedules and any attachments incorporated by reference and accepted by DAS become a part of this Requirements Contract.

This Requirements Contract is effective beginning and ending on the dates noted above unless, prior to the expiration date, the Contract is renewed, terminated or cancelled in accordance with the Contract Terms and Conditions.

This Requirements Contract is available to DEPARTMENT OF MENTAL HEALTH, CENTRAL WAREHOUSE, 3201 ALBERTA STREET, COLUMBUS, OH 43204, as applicable.

Agencies are eligible to make purchases of the listed supplies and/or services in any amount and at any time as determined by the agency. The State makes no representation or guarantee that agencies will purchase the volume of supplies and/or

start

AutoShapes

G:\C... Inbox... G:\ST... Micro... G:\C... OT90... Search Desktop

# Locate the Item & Pricing

OT904406 DMH017 Rev.doc - Microsoft Word

File Edit View Insert Format Tools Table Window Help Adobe PDF Acrobat Comments Type a question for help

Footer Arial 9 B I U

Section Break (Next Page)

Index No. DMH017S  
Rev. 07/01/08  
Page 10

PRICE SCHEDULE

* ITEM ID NUMBER	ITEM	MINIMUM ORDER	PACKAGING	CASE PRICE	MANUFACTURER AND BRAND NAME	CONTRACTOR
2566	<u>QUATERNARY AMMONIUM TYPE DISINFECTANT - DETERGENT</u> 1 gallon bottles with one (1) no less than 1 oz. measuring device packed in each case	1,000 gal.	4/1 gal./cs.	\$29.27	<u>Manufacturer:</u> State Cleaning Solutions * <u>Brand Name:</u> Quartermgent	DIRECT RESOURCE INC.
8190	<u>QUATERNARY AMMONIUM TYPE SANITIZER - DETERGENT</u> <u>Concentration Test Strips</u> Manufacturer: Micro Essentials Laboratory Brand Name: pHdrion Papers Stock No. QT-10	1,000 gal.	4/1 gal./cs.	\$22.27	<u>Manufacturer:</u> State Cleaning Solutions * <u>Brand Name:</u> Sani Quat *	DIRECT RESOURCE INC.

Draw AutoShapes

start G:\C... Inbox... G:\ST... Micro... G:\C... OT90... Search Desktop 3:30 PM

# Review Contractor Index

http://www.procure.ohio.gov/RevisedContract/OT904406\_RC.pdf - Windows Internet Explorer

http://www.procure.ohio.gov/RevisedContract/OT904406\_RC.pdf

File Edit Go To Favorites Help

http://www.procure.ohio.gov/RevisedContract/OT90...

Save a Copy Print Search Select Sign Find: Previous Next

Pages

Index No. DMH017S  
Rev. 07/01/08  
Page 11

CONTRACTOR INDEX

CONTRACTOR AND TERMS: BID/CONTRACT NO.: OT904406 (9/30/09) \*

75912  
Direct Resource Inc.  
2121 Citygate Drive  
Columbus, OH 43219

DELIVERY: 21 Days ARO

TERMS: Net 30 Days

CONTRACTOR'S CONTACT: Alvin C. Lai,  
Telephone: (614) 337-0300  
Toll Free: (800) 888-1928  
FAX: (614) 337-1313  
E-mail: [cs@directresourceinc.com](mailto:cs@directresourceinc.com)

ITEM ID CODE NO.: 9201 - Freight charges on orders totaling less than Minimum Order Quantities.

Attachments

# Check Contract in OAKS

**Contract Entry**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value  Add a New Value

SetID: = STATE

Contract ID: begins with OT904406-1

Contract Process Option: =

Short Vendor Name: begins with

Correct History

[Basic Search](#)

**Search Results**  
View All First 1-2 of 2 Last

SetID	Contract ID	Contract Process Option	Vendor ID	Short Vendor Name	Expire Date	Contract Status
STATE	OT904406-2	Order	0000101061	US BANK NA_3	10/31/2009	Approved
STATE	OT904406-1	Order	0000075912	DIRECT.RES_2	09/30/2009	Approved

[Find an Existing Value](#) [Add a New Value](#)

# Reviewing the OAKS Contract

The screenshot displays the OAKS Financials web application interface. The browser window title is "Add/Update Contracts - Windows Internet Explorer". The address bar shows the URL: [https://fin.oaks.ohio.gov/psp/fnprd\\_internal/EMPLOYEE/ERP/c/ADMINISTER\\_CONTRACTS.CNTRCT\\_ENTRY.GBL?PORT](https://fin.oaks.ohio.gov/psp/fnprd_internal/EMPLOYEE/ERP/c/ADMINISTER_CONTRACTS.CNTRCT_ENTRY.GBL?PORT). The page features a navigation menu on the left and a main content area with tabs for "Contract", "Create Releases", and "Review Releases".

**Contract Details:**

- SetID: STATE
- Contract ID: OT904406-1
- \*Status: Approved

**Header Information:**

- Contract Owner: DAS
- Contract Index Number: DMH017
- Contract Bill Type: BillAgency
- MBE Flag: M

**Vendor Information:**

- Process Option: Purchase Order
- Vendor: DIRECT RES\_2
- Vendor ID: 0000075912
- Company: DIRECT RESOURCE INC

**Dates and Currency:**

- Begin Date: 10/01/2005
- Expire Date: 09/30/2009
- Currency: USD CRRNT

**Amount Summary:**

Maximum Amount:	0.00 USD
Total Line Released Amount:	111,122.30
Open Item Amount Released:	0.00
<b>Total Released Amount:</b>	<b>111,122.30</b>

**Order Contract Options:**

- Allow Multicurrency PO
- Allow Open Item Reference
- Must Use Contract Rate Date
- Corporate Contract
- Adjust Vendor Pricing First
- Rate Date: 10/01/2005
- Price Can Be Changed on Order
- Lock Chartfields

The Windows taskbar at the bottom shows the Start button, several open applications (G:\CONTRACT..., Inbox - Micros..., Microsoft Pow..., Add/Update C...), and the system clock indicating 3:38 PM on 10/01/2005.

# OAKS Contract with Items

Windows Internet Explorer browser window showing the OAKS Financials application. The address bar displays: [https://fin.oaks.ohio.gov/psp/fnprd\\_internal/EMPLOYEE/ERP/c/ADMINISTER\\_CONTRACTS.CNTRCT\\_ENTRY.GBL?PORT](https://fin.oaks.ohio.gov/psp/fnprd_internal/EMPLOYEE/ERP/c/ADMINISTER_CONTRACTS.CNTRCT_ENTRY.GBL?PORT)

The page title is "Add/Update Contracts". The OAKS Financials logo is visible in the top left corner. A navigation menu is located on the left side of the page.

The main content area is titled "Add Items From" and includes a "Catalog" and "Item Search" link. Below this is a table of contract items.

Line	Item	Description	UOM	Category	Include Releas
1	00000000000002566	LIQUID QUATERNARY AMMONIUM TYPE DISINFECTANT DETERGENT PKG.: 4/1 GAL./CS. MFG.: QUALITY CHEMICAL, INC. BRAND NAME: QUARTERGENT	CS	47131800	<input type="checkbox"/>
2	00000000000008190	LIQUID QUATERNARY AMMONIUM TYPE SANITIZER DETERGENT PKG.: 4/1 GAL./CS. MFG.: QUALITY CHEMICAL, INC. BRAND: QUANTINIZER	CS	47131800	<input type="checkbox"/>
3	00000000000009201	FREIGHT CHARGES ON ORDERS TOTALING LESS THAN MINIMUM ORDER QUANTITIES. .	EA	78121600	<input type="checkbox"/>

Below the table, there are buttons for "Save", "Return to Search", "Previous in List", "Next in List", "Notify", "Refresh", "Add", and "Update/Disp".

At the bottom of the page, there are links for "Contract | Create Releases | Review Releases".

The Windows taskbar at the bottom shows the Start button, several open applications (G:\CONTRACT..., Inbox - Micros..., Microsoft Pow..., Add/Update C...), a search bar, and the system clock showing 3:41 PM on 3/10/2010.

# Create Requisition

The screenshot displays the 'Create Requisition' web application within a Windows Internet Explorer browser window. The browser's address bar shows the URL: `https://fin.oaks.ohio.gov/psp/fnprd_internal/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_ENTRY.GBL?FolderPath=POF`. The application header includes the 'OAKS Financials' logo and navigation links for Home, Worklist, Add to Favorites, and Sign out. A left-hand menu lists various procurement options, with 'Create Requisition' selected. Below the menu is a 'Requisition Summary' box indicating that there are no lines on the request and providing instructions to add new lines. The main content area, titled 'Create Requisition', features a workflow navigation bar with steps: Settings, Find Items, Modify Shipping, Modify Accounting, and Review and Submit. Below this is a 'Request Defaults' form with the following fields: Business Unit (DAS01, Dept of Admin Services), Requester (10027966, ANGELITA STASIAK), Requisition Name (Catalog Requisition Example), and Currency (USD). 'Continue' and 'Cancel' buttons are located at the bottom of the form. The Windows taskbar at the bottom shows the Start button, several open applications, and the system clock at 3:50 PM.

**Menu**

- eProcurement
  - Buyer Center
  - Create Requisition**
  - Manage Requisitions
  - My Profile
- Services Procurement
- Accounts Receivable
- Accounts Payable
- Commitment Control

**Requisition Summary**

There are no lines on this request.

Please add new line in order to save this requisition.

Total Lines: 0  
Total Cost (USD): 0

**Create Requisition**

Settings → Find Items → Modify Shipping → Modify Accounting → Review and Submit

**Request Defaults**

\*Business Unit: DAS01 Dept of Admin Services  
\*Requester: 10027966 ANGELITA STASIAK  
Requisition Name: Catalog Requisition Example Currency: USD

Continue Cancel

# Create Catalog Requisition when Purchasing Items from a Contract

Windows Internet Explorer

https://fin.oaks.ohio.gov/psp/fnprd\_internal/EMPLOYEE/ERP/c/PV\_MAIN\_MENU.PV\_REQ\_ENTRY.GBL?FolderPath=POF

Create Requisition

OAKS Financials

Home | Worklist | Add to Favorites | Sign out

Menu

- eProcurement
  - Buyer Center
    - Create Requisition
    - Manage Requisitions
    - My Profile
  - Services Procurement
  - Accounts Receivable
  - Accounts Payable
  - Commitment Control

Requisition Summary

There are no lines on this request.

Please add new line in order to save this requisition.

Total Lines: 0  
Total Cost (USD): 0

Settings → Find Items → Shipping → Accounting → Submit

Search: [ ] Search

Catalog | Favorites | Templates | Forms | Web | Special Request

Browse Catalog

\*Select a catalog: All Items

- UNSPSC Node for OAKS Catalog

- Choose from available catalogs in the dropdown list
- Navigate categories by clicking folders
- View items in a category by clicking the category name
- Use the checkboxes to select categories to search below

Search Catalog

Search contains all of the following search fields entered:

Description: [ ]

Manufacturer: [ ]

Manufacturer's Item ID: [ ]

Vendor: [ ]

Vendor Item ID: [ ]

Item ID: %2566

UPN ID: [ ]

Search

Done

start | G:\CONTRAC... | Inbox - Micro... | Microsoft Po... | Create Requi... | Search Desktop | 3:53 PM

# Add Item(s) to Requisition

**Manufacturer's Item ID:**

**Vendor:**

**Vendor Item ID:**

**Item ID:** %2566

**UPN ID:**

Include Images

**2 Results** [Show Images](#)

Sort Items:  [First](#) [1 - 2](#) of 2 [Last](#)

Item Description	Vendor	Loc	Mfg Name	Price	Curr	UOM	Qty	
<input type="checkbox"/> 30 DAY TAG; CONTRACTOR'S ORDER	32 FORD MERCURY INC	CHK		10.500	USD	Each	1,000	
<input checked="" type="checkbox"/> LIQUID	DIRECT RESOURCE INC	CHK		29.270	USD	Case	10,000	

Select All / Deselect All

[Review and Submit](#)

**Requisition Summary**  
There are no lines on this request.  
Please add new line in order to save this requisition.  
Total Lines: 0  
Total Cost (USD): 0

# Data is Automatically Brought Into the Requisition

Create Requisition - Windows Internet Explorer

https://fin.oaks.ohio.gov/psp/fnprd\_internal/EMPLOYEE/ERP/c/PV\_MAIN\_MENU.PV\_REQ\_ENTRY.GBL?FolderPath=POF

File Edit View Favorites Tools Help

Create Requisition

OAKS Financials

Home Worklist Add to Favorites Sign out

Settings Find Items Shipping Accounting Submit

Requisition Name: Catalog Requisition Example

Requester: 10027966 ANGELITAPriority: Medium \*Bill Address: P002252 STASIAK

CB Number DAS RP Number Apply Defaults

Contract ID OIT RP Number

	Description	Vendor Name	*Qty	Unit	Price	Total	Contract ID	CB Number	DAS RP Number	OIT RP N
<input type="checkbox"/>	1 LIQUID QUATERNARY AMMONIUM TYP	DIRECT RESOURCE INC	20.0000	Case	29.270	585.40	OT904406-1			

Select All / Deselect All Total Amount: 585.40 USD

Add to favorites Shipping Accounting Delete

Justification/Comments

Send to Vendor  Show at Receipt  Show at Voucher

Check Budget

Save as Template

Save & submit Save & preview approvals Cancel requisition Find more items

javascript:submitAction\_win0(document.win0,'PV\_REQ\_WRK\_PV\_FIND\_ITEMS\$13\$');

Internet 100%

# Deliver it Where/When?

Windows Internet Explorer

https://fin.oaks.ohio.gov/psp/fnprd\_internal/EMPLOYEE/ERP/c/PV\_MAIN\_MENU.PV\_REQ\_ENTRY.GBL?FolderPath=POF

File Edit View Favorites Tools Help

Create Requisition

Home Worklist Add to Favorites Sign out

Menu

Search:

- My Favorites
- Employee Self-Service
- Supplier Contracts
- Items
- Vendors
- Purchasing
- eProcurement
  - Create Requisition
  - Manage Requisitions
  - My Profile
- Services Procurement
- Accounts Receivable
- Accounts Payable
- Commitment Control
- General Ledger
- Set Up Financials/Supply Chain
- Worklist
- Reporting Tools
- PeopleTools
- Change My Password
- My System Profile

New Window | Help

Defaults

Contract ID	CB Number	DAS RP Number	OIT RP Number	
P908306-3	<input type="text"/>	<input type="text"/>	<input type="text"/>	

View All First 1 of 1 Last

Done Internet 100%

start Calendar - Microsoft ... Create Requisition - ... Presentation1 Presentation2 1:13 PM

# Add Distribution Details then add Chartfield Information

**Create Requisition**

Settings → Find Items → Modify Shipping → Modify Accounting → Review and Submit

**Requisition Line Number 1**

Description: LIQUID QUATERNARY AMMONIUM TYPE DISINFECTANT DETERGENT PKG.: 4/1 GAL./CS. MFG.: QUALITY CHEMICAL, INC. BRAND NAME: QUARTERGEN  Consolidate with other Reqs

Quantity: 20.0000 Unit: Case  Override Suggested Vendor

Price: 29.27000 USD Lead Time:

Shipping Information						
*Ship To Location	Attention	Quantity	Due Date	Status	Total	
	ANGELITA STASIAK	20.0000		Active	585.40	

[Review and Submit](#)

# Choose Vendor Address

The screenshot displays the 'Create Requisition' web application in Internet Explorer. The browser's address bar shows the URL: [https://fin.oaks.ohio.gov/psp/fnprd\\_internal/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU.PV\\_REQ\\_ENTRY.GBL?FolderPath=POF](https://fin.oaks.ohio.gov/psp/fnprd_internal/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_ENTRY.GBL?FolderPath=POF). The application header includes the 'OAKS Financials' logo and navigation links for Home, Worklist, Add to Favorites, and Sign out. A left-hand menu is expanded to show 'eProcurement' > 'Create Requisition'. The main content area features a 'Defaults' tab and a table with the following columns: Contract ID, CB Number, DAS RP Number, and OIT RP Number. The first row contains the value 'P908306-3'. In the action column of this row, a document icon is highlighted with a red box. The Windows taskbar at the bottom shows the Start button and several open applications, including 'Calendar - Microsoft ...', 'Create Requisition - ...', 'Presentation1', and 'Presentation2'. The system clock indicates the time is 1:13 PM.

Contract ID	CB Number	DAS RP Number	OIT RP Number	Action
P908306-3	<input type="text"/>	<input type="text"/>	<input type="text"/>	

# More Than One Remit To Address

https://fin.oaks.ohio.gov/psp/fnprd\_internal/EMPLOYEE/ERP/c/PV\_MAIN\_MENU.PV\_REQ\_ENTRY.GBL?FolderPath=POF

File Edit View Favorites Tools Help

Create Requisition

OAKS Financials

Home Worklist Add to Favorites

New Window

Line: 1 [LIQUID QUATERNARY AMMONIUM TYP](#)

Item Details

Amount: 585.40 USD

Category: Janitorial Cleaning, disinfecting solutio [View Hierarchy](#)

Buyer: BUYER [Buyer Information](#)

Vendor: 0000075912 [DIRECT RESOURCE INC](#)

Vendor Location: CHK [CHK](#) Add Seq: **2**

Vendor's Catalog:

Vendor Item ID:

Manufacturer ID:

Manufacturer's Item ID: [UPN ID:](#)

Physical Nature: Goods

RFQ Required  Zero Price Indicator  Inspection Required

Device Tracking

[Configuration Info](#)

Contract

Sourcing Controls

OK Cancel

start G:\CONTRACT... Create Requist... G:\STAFF FOLD... Microsoft Powe... Search Desktop

# Choose an Address

etID: STATE  
 endor ID: 0000075912  
 Address Sequence Number: = [dropdown]  
 Address Type: = [dropdown]

Look Up Clear Cancel [Basic Lookup](#)

**Search Results**

ew All First 1-2 of 2 Last

Address Sequence Number	Address Type	Description Address Line 1	City	County	State	Country	Email ID	Phone Type	Int'l Prefix	Telephone	Phone Extension
(blank) 2		2121 CITYGATE DR	COLUMBUS	(blank)	OH	USA	orders@directresourceinc.com	Business	(blank)	800/888-1928	(blank)
(blank) 3		C/O OBM ELECTRONIC COMMERCE	COLUMBUS	(blank)	OH	USA	(blank)	(blank)	(blank)	(blank)	(blank)

# Attach Documents or More Information

The screenshot shows a web browser window displaying the 'OAKS Financials' application. The browser address bar shows the URL: [https://fin.oaks.ohio.gov/psp/fnprd\\_internal/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU.PV\\_REQ\\_ENTRY.GBL?FolderPath=POF](https://fin.oaks.ohio.gov/psp/fnprd_internal/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_ENTRY.GBL?FolderPath=POF). The page title is 'Create Requisition'. The application header includes the 'OAKS Financials' logo and navigation links for 'Home', 'Worklist', and 'Add to Favorites'. Below the header, there is a search bar with the text 'Bill Address: P002252' and an 'Apply Defaults' button. A table is displayed with the following columns: Unit, Price, Total, Contract ID, CB Number, DAS RP Number, OIT RP Number, and an action column. The table contains one row of data: Unit: Case, Price: 29.270, Total: 585.40, Contract ID: OT904406-1. The action column for this row contains several icons, including a speech bubble icon, which is highlighted by a red rectangular box. Below the table, there is a section with a 'Find more items' link. The Windows taskbar at the bottom shows the Start button and several open applications, including 'G:\CONTRACT...', 'Create Requist...', 'G:\STAFF FOLD...', and 'Microsoft Powe...'. The system tray shows the Internet Explorer icon and the date/time '10'.

Unit	Price	Total	Contract ID	CB Number	DAS RP Number	OIT RP Number	Action
Case	29.270	585.40	OT904406-1				[Icons]

# Attach Documents or Add Notes

The screenshot shows a web browser window displaying a requisition entry page. The browser's address bar shows the URL: [https://fin.oaks.ohio.gov/psp/fnprd\\_internal/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU.PV\\_REQ\\_ENTRY.GBL?FolderPath=POF](https://fin.oaks.ohio.gov/psp/fnprd_internal/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_ENTRY.GBL?FolderPath=POF). The page title is "Create Requisition".

The page header includes the "OAKS Financials" logo and navigation links: Home, Worklist, Add to Favorites, and Sign out. There are also links for "New Window" and "Help".

The main content area is titled "Line Comments" and contains a table with the following data:

Line	Description	Quantity	Unit	Price
1	LIQUID QUATERNARY AMMONIUM TYPE DISINFECTANT DETERGENT PKG.: 4/1 GAL./CS. MFG.: QUALITY CHEMICAL, INC. BRAND NAME: QUARTERGENT	20.0000	Case	29.270 USD

Below the table is a text input field for comments. To the right of the input field is an "OK" button. Below the input field is a checkbox labeled "Send Comment to Vendor". Below the checkbox is an "Add Attachment" button.

The Windows taskbar at the bottom shows the Start button, several application icons (including Internet Explorer, G:\CONTRACT..., Create Requisit..., G:\STAFF FOLD..., Microsoft Powe..., Search Desktop), and the system tray with the time 4:26 PM and 100% zoom.

# Locate the Contract—STS/MAC

The screenshot shows a Windows Internet Explorer browser window displaying the Ohio State Procurement website. The address bar shows the URL <http://www.procure.ohio.gov/proc/index.asp>. The website header features the Ohio.gov logo with the tagline "So much to Discover." and the text "State Procurement". Below the header, there are four navigation tabs: "for Contractors/Vendors", "for Government Entities", "for State Employees", and "for the Public". The main content area includes a large graphic of the state of Ohio with a red outline and the word "Procurement" in a stylized font. To the right of the graphic are three buttons: "What's New HELP", "Selling to the State HELP", and "Current Contracts HELP". Below the graphic is a paragraph of text: "The State of Ohio Procurement Web site displays all procurement opportunities and supplies and services contract information administered by the Ohio Department of Administrative Services (DAS). These agencies issue all major procurement opportunities and negotiate all contracts displayed unless otherwise noted." On the left side, there is a vertical menu with links: "OAKS Information", "What's New", "Selling to the State", "Current Contracts", "Find It Fast", "Procurement Contacts", "Help & Reference Materials", "FAQ", "Forms", "Web Links", "Comments/Questions", and "Training/Tutorials". At the bottom of the page, there is a footer with links: "state home", "OIT home", "DAS home", "site map", "contact DAS", "search Ohio.gov", and "privacy policy". The Windows taskbar at the bottom shows the Start button, several open applications (Inbox, G:\STAF..., SPUG Sp..., SPUG C..., State Pr...), and the system tray with the time 8:53 AM.

# Review the STS Contract

The screenshot displays the 'View Contract Details' page on the Ohio State Procurement website. The browser address bar shows the URL: <http://www.procure.ohio.gov/proc/viewContractsAwards.asp?contractID=9922>. The page features the Ohio.gov logo and navigation tabs for 'Contractors/Vendors', 'Government Entities', 'State Employees', and 'the Public'. The main content area is titled 'Details for: Cleaning Equipment & Supplies' and is organized into sections: 'General Information', 'Dates', 'Other', and 'Associated PDF Files'. A left sidebar contains a navigation menu with items like 'Procurement Home', 'Current Contracts', and 'Find It Fast'. A footer contains links for 'state home', 'OIT home', 'DAS home', 'site map', 'contact DAS', 'search Ohio.gov', and 'privacy policy'.

**Ohio.gov**  
*To much to Discover!*

State Procurement

for Contractors/Vendors    for Government Entities    for State Employees    for the Public

**Details for: Cleaning Equipment & Supplies**

**General Information**

- Contract Type:** State Term Schedule
- Contract Status:** Awarded
- Commodity Category:** Janitorial & Cleaning Equipment, Supplies & Services
- Schedule Number:** 7753900208
- Index Number:** STS539U
- Vendor:** Direct Resource, Inc. (EDGE)
- Vendor OAKS Contract ID:** 7753900208-1

**Dates**

- Expiration Date:** 3/31/2012

**Other**

- Open to Co-op:** Yes
- Financing Available:** No
- Leasing Available:** No

**Associated PDF Files**

- Original Contract:** [Click to View ORIGINAL CONTRACT](#)
- Terms and Conditions:** [Click to View TERMS & CONDITIONS](#)

Back to Previous Page

state home    OIT home    DAS home    site map    contact DAS    search Ohio.gov    privacy policy

Done    Internet    100%

Slide 6 of 24    Default Design

# Collect Data from the STS Contract

http://www.procure.ohio.gov/OrigContract/7753900208\_OC.pdf - Windows Internet Explorer

http://www.procure.ohio.gov/OrigContract/7753900208\_OC.pdf

File Edit Go To Favorites Help

http://www.procure.ohio.gov/OrigContract/7753900...

118%

Save a Copy Print Search Select Sign Find: Previous Next

Minimum: \$ 100.00

Maximum: \$ 100,000.00 Agencies should contact Procurement Services when they expect to exceed the Maximum Order Limitation.

Rate Schedule: [Current Price List dated January 2008.](#)

Catalog and price list Version 0612, minus 20% discount off list price.  
GSA Schedule GS-07F-0214N

There are items in the catalog that are on mandatory use contracts or available from OPCRP/OIH, DMH, RSC or OPI; all of these items are excluded from the schedule. This exclusion may not apply to local governments, please check your jurisdiction's legal requirements in using OPCRP/OIH, DMH, RSC and OPI.

PAY-DIRECT DEALER INDEX

P.O.'s To:	Remit To:	Contractor/Dealer Contact:
<b>Encouraging Diversity, Growth and Equity (EDGE)</b> Contract ID: 7753900208-1 Vendor ID: 75912 Direct Resource, Inc. 2121 CityGate Drive Columbus, OH 43219	<b>Encouraging Diversity, Growth and Equity (EDGE)</b> Contract ID: 7753900208-1 Vendor ID: 75912 Direct Resource, Inc. 2121 CityGate Drive Columbus, OH 43219	Contact: Alvin Lai Email: Alvin@directresourceinc.com Telephone: (614) 337-0300 Fax: (614) 337-1313 Web: www.directresourceinc.com 
<b>Item Description:</b> Maintenance & Cleaning Supplies	<b>OAKS Category ID:</b> 47121500	<b>Service Counties:</b> All 88 Counties

Done Unknown Zone

# Create A Special Requisition When Purchasing From A Contract With No Items

The screenshot shows the 'Create Requisition' web application in Internet Explorer. The browser address bar displays the URL: [https://fin.oaks.ohio.gov/psp/fnprd\\_internal/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU.PV\\_REQ\\_ENTRY.GBL?FolderPath=POF](https://fin.oaks.ohio.gov/psp/fnprd_internal/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_ENTRY.GBL?FolderPath=POF). The page title is 'Create Requisition - Windows Internet Explorer'. The OAKS Financials logo is in the top left corner. A navigation menu on the left lists various options, with 'eProcurement' expanded to show 'Create Requisition', 'Manage Requisitions', and 'My Profile'. The main content area is titled 'Create Requisition' and features a breadcrumb trail: Settings → Find Items → Modify Shipping → Modify Accounting → Review and Submit. Below this is a search bar and a 'Search' button. A tabbed interface at the bottom of the main area includes 'Catalog', 'Favorites', 'Templates', 'Forms', 'Web', and 'Special Request', with 'Special Request' selected and highlighted in a red box. The 'Special Request - Order Goods and Services Not Available in Item Catalogs' form contains the following fields:

- \*Description: [Text Input]
- \*Category: [Text Input]
- \*Price: [Text Input]
- \*Qty: [Text Input]
- Vendor ID: [Text Input]
- Mfg ID: [Text Input]
- Due Date: [Text Input]
- \*Currency: [Text Input, set to USD]
- \*Unit of Measure: [Text Input]
- Additional Information: [Text Area]
- Send to Vendor
- [Add Item] [Cancel]

The Windows taskbar at the bottom shows the Start button, several open applications (Inbox - Microsoft Outlook, Microsoft PowerPoint, Create Requisition), and the system clock displaying 12:38 PM on 12/31.

# Add the Contract Number

The screenshot displays the 'Create Requisition' web application. The browser window title is 'Create Requisition - Windows Internet Explorer'. The address bar shows the URL: [https://fin.oaks.ohio.gov/psp/fnprd\\_internal/EMPLOYEE/ERP/c/PV\\_MAIN\\_MENU.PV\\_REQ\\_ENTRY.GBL?PORTALPARAM](https://fin.oaks.ohio.gov/psp/fnprd_internal/EMPLOYEE/ERP/c/PV_MAIN_MENU.PV_REQ_ENTRY.GBL?PORTALPARAM). The page header includes the 'OAKS Financials' logo and navigation links: Home, Worklist, Add to Favorites, Sign out. A 'Review and Submit' button is visible. Below the header, there is a search bar for '\*Bill Address: P002099' and an 'Apply Defaults' button. The main content area features a table with the following columns: Qty, Unit, Price, Total, Contract ID, CB Number, DAS RP Number, and OIT RP Number. The 'Contract ID' column is highlighted with a red box. The table contains one row with the following data: Qty: 3.0000, Unit: Each, Price: 100.000, Total: 300.00. Below the table, the amount is displayed as 'Amount: 300.00 USD'. The Windows taskbar at the bottom shows the start button, several open applications (Inbox, State Pro..., G:\STAF..., SPUG.ppt, Create R...), and the system clock showing 1:52 PM.

Qty	Unit	Price	Total	Contract ID	CB Number	DAS RP Number	OIT RP Number
3.0000	Each	100.000	300.00				

Amount: 300.00 USD

# Special Request Requisition

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- Finish creating a Special Request Requisition the same as a Catalog Requisition

# Contract Number on Vouchers

**OAKS Financials** Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Invoice Information | Payments | Voucher Attributes

Business Unit: DAS01 Invoice Number: 1234569  
Voucher ID: NEXT Invoice Date: 03/11/2009  
Voucher Style: Regular  
Vendor: 0000069737 Last Receipt Date: 03/02/2009 [Non Merchandise Summary](#)  
Name: CINTAS COR\_1 Misc. Amount: [Withholding](#)  
Location: EFT-1 Freight Amount:  
\*Address: 1  
CINTAS CORPORATION  
1300 BOLTONFIELD ST  
COLUMBUS, OH 43228  
Total: 325.00  
Balance: 0.00  
[Comments](#)

[Advanced Vendor Search](#)

\*Pay Terms: 2/10 Net30 Basis Dt Type: Invoice Date  
Accounting Date: 03/11/2009  
Control Group: \*Currency: USD

Copy from a Source Document  
PO Unit: Purchase Order: [Copy PO](#) Worksheet Copy Option: None

Invoice Lines

Line	*Distribute by	Item	Description	Quantity	UOM	Unit Price	Extended Amount
1	Amount		rentals	1.0000	MO	325.00	325.00

Ship To: SpeedChart  
P006275  Use One Asset ID

Term Contract ID: RS9 01 209-3 MBE Flag: N Received Date:

# Review

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- State Procurement Website  
[www.ohio.gov/procure](http://www.ohio.gov/procure)
- Contract with items use Catalog Requisition
- Contract without items use Special Requisition

# IT Set-Asides Participation & OAKS Certification

**Todd McGonigle**

*EEO Program Manager*

*MBE/EDGE Unit*

- Contract Set-Aside Requirements (All Agencies)
  - All agencies that have the authority to let contracts must set-aside 15% of the total estimated value of all contract and purchases.
  - Monthly all contracts awarded must be reported to EOD. Form to be provided.
  - Contracts include IT, personal services, etc.

- OAKS Certification –

- When making a purchase with an MBE/EDGE the status of the MBE/EDGE should be checked.
- No companies can be flagged MBE or EDGE until an W9 is issued.

- Upcoming Trainings

- DATE CHANGES
- Understanding Quarterly Reports and How to Effectively Utilize - 03/09/2009
- How Complete and Develop an Effective MBE/EDGE Projection Plan 04/09/2009
- Special Training – How to: Flag EDGE/MBE purchases, Get credit for incorrectly coded purchase, Flag EDI, retro actively flag MBE/EDGE purchase, and more. 04/29/2009
- How to Develop and Implement MBE/EDGE Outreach Programs 05/12/2009
- How to Get Buy-in from Users of MBE/EDGE Services and Locating Vendors 06/11/2009

*State Term Schedule*  
*Pricing Provisions*

**Mo McGuire**

**Office of Procurement Services**  
**Procurement Manager**



### **III. PRICING PROVISIONS:**

**A. ECONOMIC PRICE ADJUSTMENT.** The State will be entitled to a price decrease any time the Contractor or any of its distributors sells a product or a service to any similarly situated most favored customer for less than the price agreed to between the State and the Contractor under this Contract. Any time the Contractor or any of its distributors sells a product or provides a service to any customer or dealer for less than its is then available to the State under this Contract, the Contractor must notify the State of that event within thirty (30) calendar days of its occurrence and immediately reduce the price of the affected goods or services to the State under this Contract.....

**It is recommended and encouraged for agencies to contact State Purchasing whenever a vendor on contract is consistently providing a price lower than what is on contract, specifically with STS. The contract language allows us to renegotiate the pricing.**

# *IT Procurement Services*

**Tom Hart**

**Office of Procurement Services**

**IT Procurement Services Manager**



# Kaizen Project: Phase II

DAS Office of Procurement  
Services (OPS)



# Request to Purchase (RTP) Process

Lauren Brown  
Gretchen Adkins



# The New RTP Process

- Governor Strickland Executive Order (2008-012S)
  - Cost savings opportunities
  - Improved efficiency



# The New RTP Process

- Agency has a need that exceeds their Direct Purchase Limit
- New method for requesting a Release and Permit or Contract
- Government entities initiate requests online (RTP)
- OPS determines procurement method



# The New RTP Process

- Applicable for all state agencies and boards & commissions
- Effective April 1, 2009



# The New RTP Process

- Agency completes RTP Form and submits electronically
  - RTP Form replaces the DAS R&P Form
- OPS receives RTP and determines best procurement method



# The New RTP Process

- Procurement Methods OPS considers:
  - State Resources
  - Competitive Bid
  - Competitive Sealed Proposal
  - State Term Schedule
  - Release and Permit



# The New RTP Process



OhioDAS

for Contractors/Vendors

for Government Entities

for State Employees

for the Public

## Request To Purchase

[Auditor Login](#)

### Section 1 Contact Information

\* - Required Field

\*Date of Request: 11/18/2008

\*Government Entity:

\*Street Address:

\*City:

\*State: Ohio

\*ZIP:

### Contact Person:

\*First Name:

\*Last Name:

\*Email:  (username@domain.com) \* Phone No.:  (xxx-xxx-xxxx)

### Section 2 Request Information

\*Brief description of supplies or services to be purchased. (Detailed Specifics should be attached).



# The New RTP Process

## Section 3 List Known Available Sources:

Vendor Name:  (please put full vendor name)  
OAK ID No.   
Address:   
City:   
State:   
ZIP Code:   
This vendor is a:  Manufacturer  Dealer  Not Sure

Vendor Name:  (please put full vendor name)  
OAK ID No.   
Address:   
City:   
State:   
ZIP Code:   
This vendor is a:  Manufacturer  Dealer  Not Sure

Vendor Name:  (please put full vendor name)  
OAK ID No.   
Address:   
City:   
State:   
ZIP Code:   
This vendor is a:  Manufacturer  Dealer  Not Sure



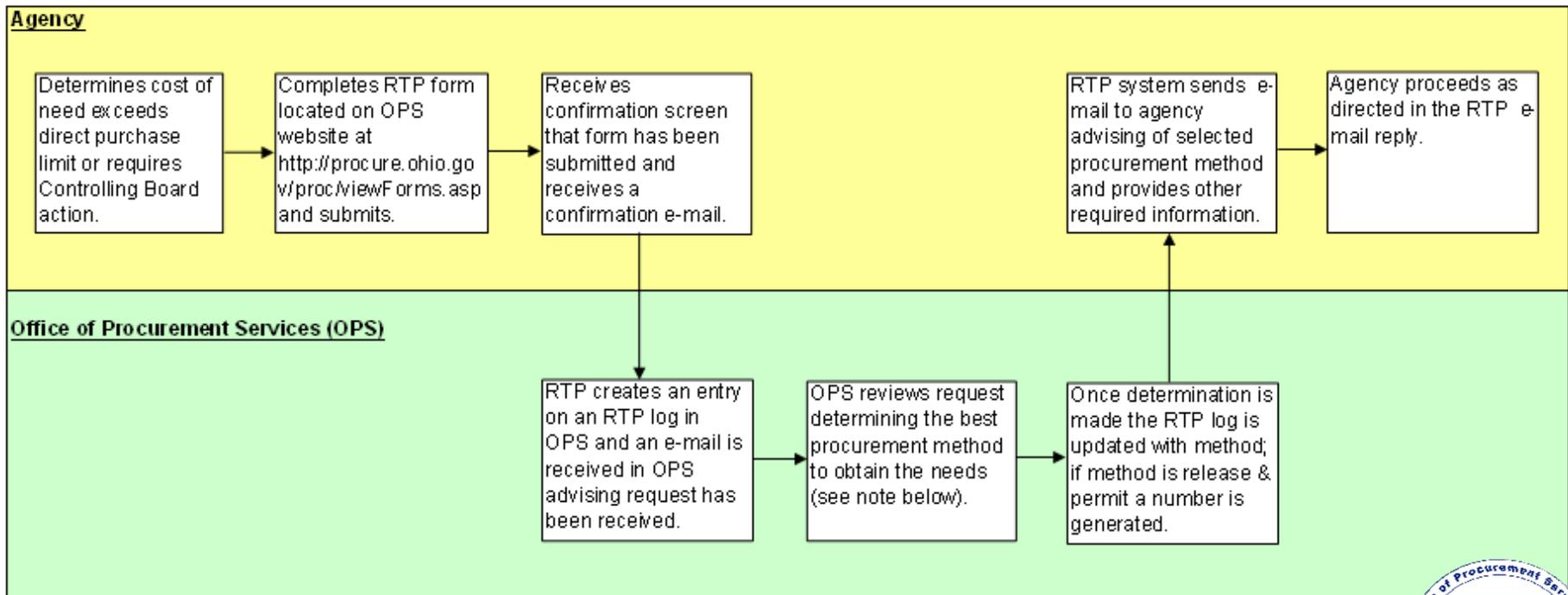
# The New RTP Process

- Procurement Services Notifies Initiator
  - RTP reply e-mail is sent to the Entity Contact Representative
  - Advises determination of procurement method
  - Provides Procurement Services contact person or when applicable the R&P number



# The New RTP Process

## Request to Purchase Flow



# The New RTP Process

- Advantages
  - Improved Efficiency
    - Standardization For All Agencies
    - Proper Procurement Methodology
    - Cost Savings
      - Consolidated Purchases = Volume Discounts
      - Increased Competition
    - More Relevant Contracts, Entity Driven



# The New RTP Process

Questions ?



# Thank You for Attending

Complete the survey and leave it on your chair.

The Next SPUG Meeting will be held on June 9th, 2009.

Please forward suggestions for the Agenda to Tammy Marcum.

