

# Agency Procurement Officers Meeting

1

We'll begin promptly at 1:00

3

Please verify your computer's speakers are on

2

The meeting's audio is being broadcast through your computer

4

Questions submitted on-line will be answered after each presentation or during open discussion





# Organizational Updates

Kelly Sanders  
Chief Procurement Officer

# Organizational Updates

- Dave Colopy has been promoted to State Contracts Manager, overseeing the Food, Clothing, Office Goods & Services Team and the Fleet & Business Services Team



## APO Update

December 11, 2019

# Agenda

1. Ohio|Buys Status
2. Onboarding Details
3. Training Update

# Ohio|Buys Status

# Ohio|Buys Production Status

Ohio|Buys was re-launched on Wednesday, December 4<sup>th</sup> with upgraded functionality including access to all DAS contracts, improved search capabilities, and significantly more catalogs to shop. Additional functionality includes:

- IT Release and Permit AND Requisite Program purchasing all in one solution
- Automated rules engines, so all purchase approvals travel automatically through a purchase process
- Guided shopping experiences with baked-in compliance
- Ability to generate a solicitation for three quotes, have suppliers respond, and award - all conducted in Ohio|Buys
- Complete transparency – including access to relevant supplier information, the ability to review steps in any procurement process, and complete visibility to where a purchase request resides

# Ohio|Buys Production Status

- All DAS contracts are now loaded into Ohio|Buys
- More than 400 catalogs have been added to the shopping experience
- All requisite programs are now in Ohio|Buys and can review requests
- Approximately 600 additional suppliers have been invited to access Ohio|Buys

# Ohio|Buys Production Status

Early issues include:

1. Notifications - All agencies notified of agency-specific purchases
2. Requisite Programs - All programs notified of program-specific needs
3. Roles - Some users assigned roles that need updated

All issues are being worked and status updates go out to all Agency Leads and Requisite programs on a regular basis.

# Onboarding Details

# A Customized Onboarding Approach

OCM continues to work closely with Early Adopter Agencies to design a **customized onboarding approach** to best meet the Agency needs, including:



## Just-in-time training and support to allow users to prepare for rollout

- **Curriculum guides & web-based** training
- Instructor-led **classroom** training  
(For specific roles requisitioner, procurement approver, fiscal approver)
- Detailed **job aids**



## Targeted onboarding dates

- Provide the best possible user experience
- Agency-specific post-onboarding support

# Onboarding Schedule by Agency

As mentioned previously we are doing a customized onboarding approach to training and onboarding agencies to Ohio|Buys. Below are the details by agency.

December		January
✓ DAS	• LOT	• DMH (continued)
✓ EOD	• COM	• DPS
✓ SME Reviewers	• INS	• BWC
✓ SIM Group	• DRC	• DOH (continued)
✓ Existing Pcard Users	• DYS	• OBM
✓ OOD		• DRC (continued)
✓ DOH (central)		• DYS (continued)
✓ OFCC		• DOT
✓ OBM AP		
✓ LOT		
✓ COM		
✓ DMH (central)		
✓ INS		

# Approximate User Count by Agency

Agencies	User Counts
DAS	173
Bureau of Workers Comp (BWC)	41
Commerce (COM)	74
Department of Health (DOH)	95
Insurance (INS)	40
Lottery (LOT)	397
Department of Mental Health and Addiction Services (DMH)	250
Office of Budget & Management (OBM)	169
Department of Public Safety (DPS)	504
Department of Rehabilitation and Correction (DRC) & Department of Youth Services (DYS)	14,291
Department of Transportation (DOT)	206
OFCC	84
Opportunities for Ohioans with Disabilities (OOD)	80
Various Approvers	53
<b>TOTAL</b>	<b>16,404</b>

# Training Update

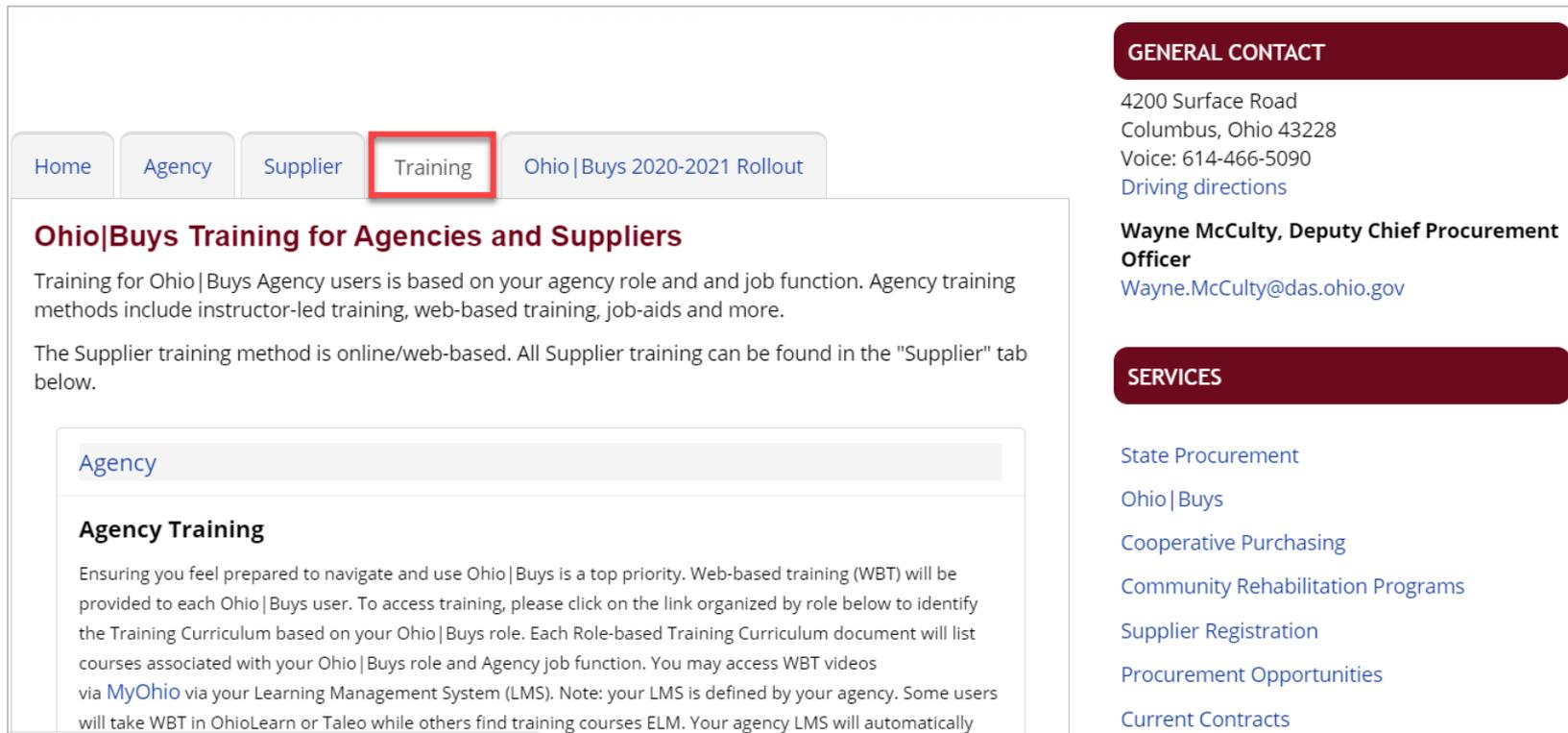
# Training Survey Results

## Positive feedback on in-class Requisitioner Training

Agency	Processes					Instruction							
	Explain the Purchase Requisition process in OhioBuys Search for and compare goods and/or services in OhioBuys Create and submit purchase requisitions to request goods and/or services Duplicate or cancel a purchase requisition					The clarity of information presented How helpful the material will be when you return to your desk The visual appeal of the materials (clean, easy to follow)				Rate of speech Ability to provide answers to questions/feedback Knowledge of the topic(s) Ability to use examples/tell relevant stories			
	Creating and Managing Purchase Requisitions					Instructional Materials				Instructors			
Agency	Confidence Level					Quality of Material							
Department of Youth Services (DYS)	Average	Moderately Confident	Highly Confident	Moderately Confident	Moderately Confident	Average	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Department of Transportation (DOT)	Average	Moderately Confident	Highly Confident	Highly Confident	Highly Confident	Average	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Department of Rehabilitation and Correction (DRC)	Average	Moderately Confident	Moderately Confident	Moderately Confident	Moderately Confident	Average	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Department of Administrative Services - Fiscal (ASD)	Average	Moderately Confident	Moderately Confident	Moderately Confident	Highly Confident	Average	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent
Department of Administrative Services (GSD-OPS)	Average	Highly Confident	Highly Confident	Highly Confident	Highly Confident	Average	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent	Excellent

# Accessing Training Curriculum by Role

Located on the Ohio|Buys Website:



The screenshot shows the Ohio|Buys website interface. At the top, there is a navigation menu with five tabs: Home, Agency, Supplier, Training, and Ohio|Buys 2020-2021 Rollout. The 'Training' tab is highlighted with a red border. Below the navigation menu, the main content area is titled 'Ohio|Buys Training for Agencies and Suppliers'. It contains two paragraphs of text explaining the training methods and a sub-section titled 'Agency Training' with a list of links. On the right side, there are two dark red boxes with white text: 'GENERAL CONTACT' and 'SERVICES'. The 'GENERAL CONTACT' box lists the address, phone number, and email of Wayne McCulty, Deputy Chief Procurement Officer. The 'SERVICES' box lists various procurement services.

Home Agency Supplier **Training** Ohio|Buys 2020-2021 Rollout

## Ohio|Buys Training for Agencies and Suppliers

Training for Ohio|Buys Agency users is based on your agency role and and job function. Agency training methods include instructor-led training, web-based training, job-aids and more.

The Supplier training method is online/web-based. All Supplier training can be found in the "Supplier" tab below.

[Agency](#)

### Agency Training

Ensuring you feel prepared to navigate and use Ohio|Buys is a top priority. Web-based training (WBT) will be provided to each Ohio|Buys user. To access training, please click on the link organized by role below to identify the Training Curriculum based on your Ohio|Buys role. Each Role-based Training Curriculum document will list courses associated with your Ohio|Buys role and Agency job function. You may access WBT videos via [MyOhio](#) via your Learning Management System (LMS). Note: your LMS is defined by your agency. Some users will take WBT in OhioLearn or Taleo while others find training courses ELM. Your agency LMS will automatically

### GENERAL CONTACT

4200 Surface Road  
Columbus, Ohio 43228  
Voice: 614-466-5090  
[Driving directions](#)

**Wayne McCulty, Deputy Chief Procurement Officer**  
[Wayne.McCulty@das.ohio.gov](mailto:Wayne.McCulty@das.ohio.gov)

### SERVICES

- [State Procurement](#)
- [Ohio|Buys](#)
- [Cooperative Purchasing](#)
- [Community Rehabilitation Programs](#)
- [Supplier Registration](#)
- [Procurement Opportunities](#)
- [Current Contracts](#)

# Accessing Training Curriculum by Role

## Agency Training

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### Ohio|Buys Training Curriculum by Role:

1. [Ohio|Buys Training Curriculum for Requester](#)
2. [Ohio|Buys Training Curriculum for Requester Supervisor](#)
3. [Ohio|Buys Training Curriculum for Requisitioner](#)
4. [Ohio|Buys Training Curriculum for Central Receiver](#)
5. [Ohio|Buys Training Curriculum for Procurement Agency Approver](#)
6. [Ohio|Buys Training Curriculum for Fiscal Agency Approver](#)
7. [Ohio|Buys Training Curriculum for Final Agency Approver](#)
8. [Ohio|Buys Training Curriculum for Quick Quote Procurement User](#)
9. [Ohio|Buys Training Curriculum for Agency Admin](#)
10. [Ohio|Buys Training Curriculum for Procurement Manager](#)
11. [Ohio|Buys Training Curriculum for Catalog Analyst](#)
12. [Ohio|Buys Training Curriculum for Contract Analyst](#)
13. [Ohio|Buys Training Curriculum for EOD Compliance Specialist](#)
14. [Ohio|Buys Training Curriculum for SME Reviewer](#)

# Accessing Web-based Training

Log in to Ohio Learn

## Ohio Learn Agencies *Only DAS / DYS / DRC / OBM / DOH*

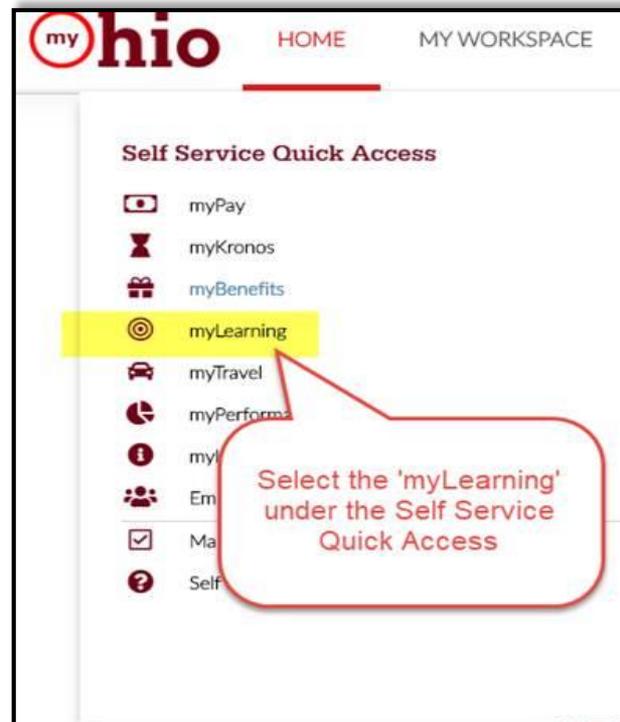
The screenshot displays the Ohio Learn user interface. At the top, the logo for the Department of Administrative Services is visible, along with navigation links for Home, My Training, Training Catalog, Resources, and Administration. A user profile section identifies the user as JAMES YAGODICH and includes a Logout button. The main content area features a personalized greeting: "Hi, JAMES" followed by the instruction "Get started immediately with your Ohio training!". Below this are five buttons: "Getting started overview", "View my agency training", "View my statewide training", "View my transcript", and "View my team". A callout box points to the "View my statewide training" button, stating: "Every Ohio Learn end user has access to 'statewide training' in their agency's homepage. This is a quick way to get right to the catalog to select courses for Ohio|Buys or any other statewide training". The bottom section, titled "Announcements", contains two news items. The first, dated 10/20/2016, announces the live launch of the DAS LearnCenter and includes a "Launch" button. The second, dated 10/19/2016, mentions instructor-led trainings and includes a "View my agency in-progress training" button.

# Accessing Web-based Training

Log in to myLearning (ELM)

## ELM Agencies

*All other Early Adopter Agencies*



# Accessing Job Aids

Located on the Ohio|Buys Website:

Home **Agency** Supplier Training Ohio|Buys 2020-2021 Rollout

## Ohio|Buys for Agencies

Starting in 2016, the State of Ohio looked to secure a procurement-specific software solution to work with the OAKS Financial solution providing a comprehensive suite of tools for buyers and suppliers.

**NextGen eProcurement**

**Ohio|Buys**  
Connecting Buyers and Suppliers  
2019+

**OAKS** Ohio Administrative Knowledge System  
OAKS go-live: July 2007/FY2008

**Ohio|eProcurement**  
**Ohio|eMarketplace**  
Pilot Launch: 2018

Ohio|Buys provides the primary platform for agency employees to perform procurement activities.

**SERVICES**

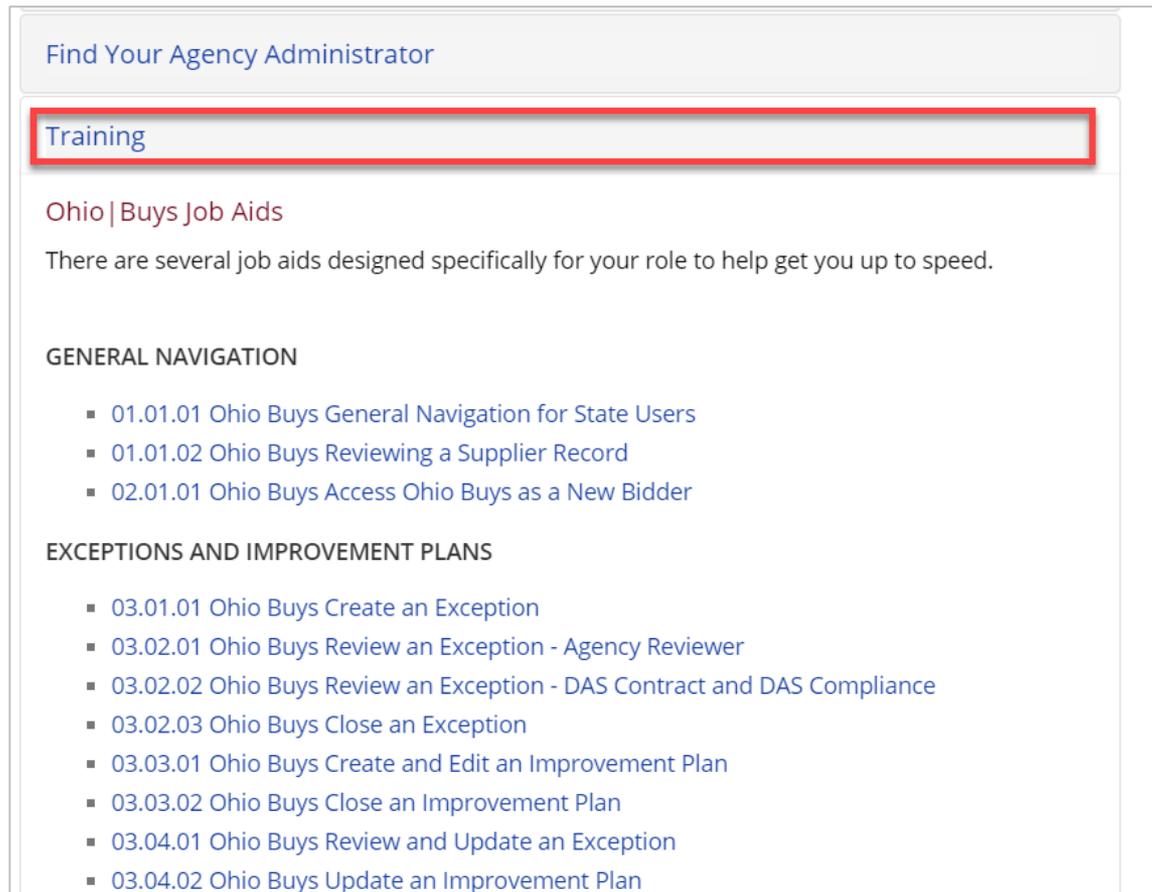
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**Wayne McCulty, Deputy Chief Procurement Officer**  
[Wayne.McCulty@das.ohio.gov](mailto:Wayne.McCulty@das.ohio.gov)

# Accessing Job Aids

Scroll to the bottom of the page to the **Training** section



Find Your Agency Administrator

**Training**

Ohio | Buys Job Aids

There are several job aids designed specifically for your role to help get you up to speed.

**GENERAL NAVIGATION**

- [01.01.01 Ohio Buys General Navigation for State Users](#)
- [01.01.02 Ohio Buys Reviewing a Supplier Record](#)
- [02.01.01 Ohio Buys Access Ohio Buys as a New Bidder](#)

**EXCEPTIONS AND IMPROVEMENT PLANS**

- [03.01.01 Ohio Buys Create an Exception](#)
- [03.02.01 Ohio Buys Review an Exception - Agency Reviewer](#)
- [03.02.02 Ohio Buys Review an Exception - DAS Contract and DAS Compliance](#)
- [03.02.03 Ohio Buys Close an Exception](#)
- [03.03.01 Ohio Buys Create and Edit an Improvement Plan](#)
- [03.03.02 Ohio Buys Close an Improvement Plan](#)
- [03.04.01 Ohio Buys Review and Update an Exception](#)
- [03.04.02 Ohio Buys Update an Improvement Plan](#)

# Questions?



# Procurement Team Updates

Todd Gable  
Dave Colopy

# Procurement Team Updates

Third Party Administrator for Facility Maintenance and Repair Projects (GCD-160; Contract #CSP905120)

- Awarded to Coleman Spohn, effective January 1, 2020.
- Current contract with IAP will expire on December 31, 2019.
- POs for projects under the current contract must be issued prior to the contract expiration.
- Additional details and supplier information is available on our website: [www.procure.ohio.gov](http://www.procure.ohio.gov).

# Procurement Team Updates

## Third Party Administrator for Facility Maintenance and Repair Projects (GCD-160; Contract #CSP905120)

- Guidance for Use:
  - At an early stage, an Agency should consider whether a project is construction or maintenance.
  - If the Agency believes it is construction, then it should submit it through OAKSCI and/or contact OFCC.
  - If the Agency believes it is maintenance, or is unsure and wishes to use GDC160, it should submit an RTP for Requisite Review.
  - Professional Architecture and Engineering services must be awarded through the ORC153 Procurement Process.
  - If the work is identified as maintenance or repair and RTP passes through the Requisite Review Process, the agency may choose to utilize GDC160.
  - Questions can be directed to Jennifer Dammeyer ([Jennifer.Dammeyer@das.ohio.gov](mailto:Jennifer.Dammeyer@das.ohio.gov))

# Procurement Team Updates

## Vehicle Contracts

- Awarded
  - GDC104/RS900720 – Sedans and Passenger Vans
- Under Evaluation
  - GDC093/RS901720 – Trucks, SUVs, and Cargo Vans (December)
  - GDC038/RS902020 – Light Transit Buses (January)
  - GDC039/RS902120 – Wheelchair Vans (January)

# Procurement Team Updates

## Court Reporting

- MAC019/RS901317
  - Current contract runs through Dec. 31, 2019
  - Working on a short-term renewal
- Other sourcing methods are being researched
- Contact David Colopy ([David.Colopy@das.ohio.gov](mailto:David.Colopy@das.ohio.gov)) if you have feedback or input.



# What's on Your Mind?

Agency Procurement Officers

# NEXT MEETING

**Date:** Wednesday, March 20, 2020

**Time:** 1:00 PM – 4:00 PM

**Location:** Walnut - Willow Conference Room ●  
4200 Surface Road

**WebEx:** Link will be forwarded prior to meeting