Welcome!

Ohio DAS
Department of Administrative Services

General Services Division

Ohio DAS
General Services Division

Office of Procurement Services

State Procurement User Group
Today’s Agenda…

- Welcome, Agenda Overview, New Staff Introductions
- Searching for MBE/EDGE Vendors from the EOD website
- Tracking and Reporting MBE/EDGE Spend in OAKS
- Break
- Navigating the Procurement Website
- Overview of Vendor Registration and Bid Notification Systems
New Staff / Promotions / Introductions

Carol Cook
Contract Analyst

Medical Supplies and Services Team

Jim Hunley, Manager
New Staff / Promotions / Introductions

Matthew Crider
State Purchasing Assistant
Procurement Support Services Team
Tammy Marcum, Manager
Kellie Johnson
State Purchasing Specialist

Contract Compliance:
Complaint to Vendor (CTV)
Protests, Disputes, Waivers

Jean Stephenson, Manager
Anita Jones
Contract Analyst

Maintenance, Repair and Operational Equipment and Services

Gayle Blankenship, Manager
New Staff / Promotions / Introductions

Senthan Mahendrarasa
Contract Analyst
Food, Kitchen Equip. & Supplies, Apparel, Hotel & Conference Facilities

David Potter, Manager
Tim Riley
Contract Analyst

Vehicles & Related Items, Heavy Equip., Court Reporting, Temporary Staffing, Other Misc. Services

Alan Childress, Manager
New Staff / Promotions / Introductions

Bill Schwertfager
Contract Analyst
Office Equipment, Furniture, Carpet, Media Services Team

Ron Rowland, Manager
New Staff / Promotions / Introductions

Sinuon Todd
State Purchasing Assistant

Procurement Support Services Team
Tammy Marcum, Manager
Justine Wasmus
State Purchasing Assistant
Procurement Support Services Team

Tammy Marcum, Manager
Next on the Agenda

Searching for MBE/EDGE Vendors from the EOD website

Todd McGonigle, Manager
Department of Administrative Services / Equal Opportunity Division
Next on the Agenda

Tracking and Reporting MBE/EDGE Spend in OAKS

Sydney Waugh, OAKS Support Specialist
Department of Administrative Services / FIN Program Management Office
DAS / EOD Enters MBE/EDGE Flag in the OAKS Vendor File
DAS Enters MBE Flag for DAS Issued Contracts

Contract Details:
- SetID: STATE
- Contract ID: 7751100209-2
- Contract Owner: DAS
- Contract Index Number: STS511
- Contract Bill Type: Add Comments, Contract Activities, Primary Contact Info
- Vendor: ROGER L EL-001
- Vendor ID: 0000142092
- Begin Date: 07/25/2008
- Expire Date: 06/30/2012
- Currency: USD
- Primary Contact:
- Vendor Contract Ref:
- Description:
- Master Contract ID:
- Tax Exempt: 

Order Contract Options:
- Allow Multicurrency PO: 
- Allow Open Item Reference: 
- Corporate Contract: 
- Lock Chartfields: 
- Adj. Vendor Pricing First: 
- Price Can Be Changed on Order: 
- Must Use Contract Rate Date: Rate Date: 06/24/2008
- Dispatch Method: Print, Dispatch

Voucher Contract Options:
- Invoice Number:
- AP Business Unit:
- Accounting Template:
- Payment Terms ID: 30
- Basis Dt Type:
- Gross Amount: 0.00 USD
- Freight Amount: 0.00
- Sales Tax Amount: 0.00
- VAT Amount: 0.00
- Misc. Amount: 0.00
- Miscellaneous Charges: 
- Retention:
What Does the OAKS MBE Flag Letter Indicate

• STS / MMA / CRP Contracts
  – “N” = MBE Participation Credit, if Vendor is MBE Certified

• Other DAS Competitive Contracts
  – “M” = Set-aside Credit
  – “E” = EDGE Credit
  – “N” = MBE Participation Credit, if Vendor is MBE Certified

• Direct Purchase
  – “M” = Set-aside Credit
  – “E” = EDGE Credit
  – “N” = MBE Participation Credit, if Vendor is MBE Certified
How to Flag Expenditure as MBE / EDGE

Add comment regarding MBE / EDGE purchase and selecting *Show at Voucher* on the Requisition Summary page. This comment will be viewable on the Voucher by Selecting *View PO/Receiver* link.
Create voucher using vendor’s ID.
Select the *View PO/Receiver* link to view any comments indicating MBE / EDGE from the PO.
How to Flag Expenditure as MBE / EDGE

Select Expand arrow on *PO/Receipt Comments* section.

![PO/Receipt Comments Section](image)
The MBE flag populates with “E” or “N” based on the Vendor ID and the Certification in the vendor file. For debit vouchers or non-DAS contract purchases, the MBE flag field is available for change.
When a DAS contract is entered, manually or by copying a PO into the voucher, the MBE flag from the contract will populate the MBE flag field on the voucher – the MBE flag field is grayed out and cannot be changed.
• EOD Generates Reporting and Annual Scorecard Based on the MBE Flag Field on the Voucher.

• OAKS Reports Sent to Agencies Each Month:
  • OHAP106 – MBE & EDGE Agency Expenditures Analysis Report
    ▪ Allows agencies to see a breakdown of their MBE and EDGE totals by GL accounts
  • OHAP107 – MBE & EDGE Agency Expenditures by Certified Vendor Analysis Report
    ▪ Allows agencies to see a breakdown of their MBE and EDGE totals by Vendor and GL accounts
Questions regarding DAS Contract Flags?

Office of Procurement Services General Information
614-466-5090
Time for a Break...
Next on the Agenda

Navigating the Procurement Website

Patrice Davis, Outreach and Training Coordinator
Department of Administrative Services / Office of Procurement Services
Navigating the Procurement Website

www.ohio.gov/procure
The State of Ohio’s Procurement Web site provides access to bid opportunities and contract award information for supplies and services from all levels of state government.
What’s New?

- Announcements
- Awarded Contracts
- Opportunity Updates
Selling to the State

- Procurement Opportunities
- Construction Opportunities
- eBid Registration/Log In
- State Term Schedules (STS)
- Master Maintenance Agreements (MMA)
- MBE and EDGE
Current Contracts

Search by:
✓ Alphabetical Listing of Commodity Categories
✓ Contract Type
✓ Keyword
Select “Current Contracts”

The State of Ohio’s Procurement Web site provides access to bid opportunities and contract award information for supplies and services from all levels of state government.
Select “Search Using the Alpha List”
View all contracts within a category

View related categories or “subcategories”

### First Tier Listings

<table>
<thead>
<tr>
<th>Category</th>
<th>Click to</th>
<th>Click to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrative, Financial, Managerial, Courier, Insurance &amp; Temp Svcs</td>
<td>View 311 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Agricultural Equipment &amp; Related Products &amp; Services</td>
<td>View 35 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Arts, Crafts, Entertainment, Theatre &amp; Gaming</td>
<td>View 8 &amp; Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Automotive Products, Vehicles and Related Services</td>
<td>View 54 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Building Construction Equipment, Supplies &amp; Services</td>
<td>View 19 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Clothing, Textiles, Laundry Equipment &amp; Supplies</td>
<td>View 36 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Communication Equipment &amp; Services</td>
<td>View 60 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Computers, Software, Supplies &amp; Services</td>
<td>View 455 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Food, Food Mgmt Svcs, Food Related Equip &amp; Related Svcs</td>
<td>View 211 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Furnishings, Accessories &amp; Related Items</td>
<td>View 21 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Furniture &amp; Related Services</td>
<td>View 70 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Hardware, Hardware Related Equipment &amp; Services</td>
<td>View 29 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Highway Road Equipment, Materials &amp; Related Equip &amp; Svcs</td>
<td>View 33 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Janitorial &amp; Cleaning Equipment, Supplies &amp; Services</td>
<td>View 264 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Laboratory Equipment, Supplies &amp; Services</td>
<td>View 27 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Maintenance &amp; Repair of Equipment</td>
<td>View 31 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Medical or Dental Equipment, Supplies &amp; Services</td>
<td>View 191 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Miscellaneous Commodities &amp; Services</td>
<td>View 89 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Office Machines, Office Supplies, Related Items &amp; Svcs</td>
<td>View 26 Contracts</td>
<td>View Related Categories</td>
</tr>
<tr>
<td>Paper, Print Shop Equipment &amp; Related Products &amp; Svcs</td>
<td>View 96 Contracts</td>
<td>View Related Categories</td>
</tr>
</tbody>
</table>
Search by Contract Type and Select “Cooperative Purchasing Agreements”
Select the commodity category
A table of all contracts within that category will display
Search using a "Keyword"
Click "Keyword Search"
### Keyword Search for Contracts

**Keyword:** fuel  
**Type:** Matches on ANY words

**View Records by Category**

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Market Type</th>
<th>Index</th>
<th>Contract</th>
<th>Effective</th>
<th>Expiration</th>
<th>Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biodiesel Fuel for Ohio</td>
<td>RFP</td>
<td>Open</td>
<td>GDC002</td>
<td>CSP804610</td>
<td>12/3/2009</td>
<td>7/31/2011</td>
<td>Multiple</td>
</tr>
<tr>
<td>Fuel and Fuel Tank &amp; Dispensing Equipment</td>
<td>ITB</td>
<td>Open</td>
<td>GDC119</td>
<td>RS901808</td>
<td>7/1/2007</td>
<td>12/31/2011</td>
<td>Multiple</td>
</tr>
<tr>
<td>Maintenance &amp; BUSTR Reporting Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fuels: Gasoline/Ethanol Blend - 87 or 89</td>
<td>ITB</td>
<td>Open</td>
<td>GDC027</td>
<td>RS901110</td>
<td>12/3/2009</td>
<td>4/30/2012</td>
<td>Multiple</td>
</tr>
<tr>
<td>Octane, Unleaded, Regular and Fuel Oils:</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. 2 Heating and Diesel, etc.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Oils, Lubricants, Antifreeze</td>
<td>ITB</td>
<td>PMBE</td>
<td>GDC098</td>
<td>RS900610</td>
<td>10/1/2009</td>
<td>9/30/2012</td>
<td>Multiple</td>
</tr>
<tr>
<td>Propane Gas</td>
<td>ITB</td>
<td>Open</td>
<td>GOC064E</td>
<td>RS908308</td>
<td>6/1/2008</td>
<td>5/31/2012</td>
<td>Multiple</td>
</tr>
</tbody>
</table>

All contracts containing that word(s) will display.

Select the appropriate ‘Contract’ hyperlink.
If you know the Schedule # or the Index #, you can search for it by using “Find it Fast”.

The State of Ohio’s Procurement Web site provides access to bid opportunities and contract award information for supplies and services from all levels of state government.
Type in either the Schedule # or the Index # and select “Find it Fast”
## Find It Fast Search Results

### View Opportunity

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Status</th>
<th>Index</th>
<th>Document</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Model Year 2012 Trucks, Utility Vehicles and Cargo Vans</td>
<td>ITB</td>
<td>Awarded</td>
<td>GDC093</td>
<td>RS900812</td>
</tr>
<tr>
<td>New Model Year 2012 Trucks, Utility Vehicles and Cargo Vans (Awarded, now part of RS900812)</td>
<td>ITB</td>
<td>Awarded</td>
<td>GDC093</td>
<td>RS901212</td>
</tr>
</tbody>
</table>

### View Contract

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Status</th>
<th>Index</th>
<th>Contract</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Model Year 2012 Trucks, Utility Vehicles and Cargo Vans</td>
<td>ITB</td>
<td>Amended</td>
<td>GDC093</td>
<td>RS900812</td>
</tr>
</tbody>
</table>

Open the blue contract hyperlink to view

[Return to Selection Page](#)
Details for: New Model Year 2012 Trucks, Utility Vehicles and Cargo Vans

General Information
- **Contract Type:** Awarded Invitation to Bid
- **Contract Status:** Awarded
- **Commodity Category:** Automotive Products, Vehicles and Related Services
- **Contract #:** RS900812
- **Index Number:** GDC093
- **Vendor(s):** Click to View

Dates
- **Effective Date:** 1/20/2012
- **Expiration Date:** 9/30/2012

Procurement Program
- **MBE Participation:** Yes
- **Open Solicitation:** Yes
- **Open to Co-op:** Yes

Associated PDF Files
- **Original Contract:** Click to View ORIGINAL CONTRACT
- **Terms and Conditions:** Click to View TERMS & CONDITIONS

Open the contract to view it
Help and Reference Materials

Frequently Asked Questions (FAQ)

Forms for Vendors and Agencies

Web Links

Comments and Questions

Training and Tutorials
Choose “Help and Reference Materials”
Select an option from the drop down menu.
Choose “FAQ”
Procurement Frequently Asked Questions (FAQ)

Frequently Asked Questions (FAQ) are organized by subject. The number of questions in each subject area is provided in parenthesis. Search for a FAQ by selecting a subject, choosing 'List All Questions', or by entering a specific term using the Keyword search.

Subject Area:
- Cannot find what you are looking for? (1)
- Contracts (1)
- General Inquiries (29)
- How to get documents (1)
- Invitations to Bid (ITB) (1)
- Master Maintenance Agreements (MMA) (1)
- State Term Schedules (STS) (3)
- Where to get forms (1)

Choose from one of the subject links
Choose “Forms”
Choose from a list of agency or vendor forms
Choose “Web Links”
Procurement Web Sites

Web sites related to State Procurement are listed below. Click on the name to visit to site.

Related Web Sites

- Central Ohio Organization of Public Purchasers (COOPP)
- Cooperative Purchasing Members by County or District
- Cooperative Purchasing Program (CO-OP)
- Daily Journals of the Senate and House of Representatives
- Department of Administrative Services Home Page
- Department of Development - Division of Minority Affairs
- Disability.gov
- DMA Pre-Certification Verification
- Equal Opportunity Division
- Inter-University Council Purchasing Group (IUC)
- National Association of State Procurement Officials (NASPO)
- National Institute of Governmental Purchasing (NIGP)
- OAKS (Ohio Administrative Knowledge System)
- Office of State Printing and Standards
- Ohio Business Gateway
- Ohio Citizen Corps Sign-Up
- Ohio Community Rehabilitation Program
- Ohio Contract Management Portal
- Ohio Department of Transportation Purchasing Services
- Ohio Penal Industries
- Ohio, Indiana, Northern Kentucky (OINK) Purchasing Group
- Southwest Ohio Purchasers for Government (SWOP4G)
- State of Ohio Home Page
- State Procurement User Group
- Think Ohio First
- United States Small Business Administration
- Universal Public Purchasing Certification Council

Choose from one of the links listed
Choose “Comments and Questions”
Comments and questions may be submitted via the form or by calling (614) 466-5090.
The State of Ohio’s Procurement Web site provides access to bid opportunities and contract award information for supplies and services from all levels of state government.

Choose “Training and Tutorials”
State Procurement Web Site Tutorials

Listed below are several tutorials designed to assist you with using the Web site to find contract and/or opportunity information.

"How Do I?" Tutorials for Opportunities
--Make a selection--

"How Do I?" Tutorials for Contracts
--Make a selection--

"How Do I?" General Tutorials
--Coming Soon--

Choose a subject from one of the drop down menus.

Back to State Procurement Help and Reference Materials

Return to State Procurement Home
To post your procurement opportunity, choose “Login”
State Procurement User Login

This page provides state agencies access to post bid opportunities and contracts. Only state agencies can utilize this login page.

To post opportunities and contracts a User Login ID and Password is required. If you have not yet registered and received a Login and Password please select the “New user? Sign Up…” below.

Login Name:  
Password:  
Submit  Forgot Password

New user? Sign Up...
Next on the Agenda

Overview of the Vendor Registration and Bid Notification Systems

Krista Holcombe, OAKS Support Specialist
Department of Administrative Services / FIN Program Management Office
How do I register?

www.ohio.gov/procure
eBid Vendor and Bidder Notice

The Department of Administrative Services (DAS) is required, by law, to advertise intended purchases for the benefit of competing persons producing or dealing in the supplies or services to be purchased. These intended purchases are listed in an electronic Bid Bulletin maintained on the Procurement Services web site and may be accessed by any interested party.

As a courtesy, DAS will provide electronic notice of such purchases to any bidder who has registered with DAS for the respective supplies or services. This registration does not include opportunities for the architectural, engineering and construction industry. To obtain more information on current bid opportunities for that area please visit the Office of the State Architect web site at [http://www.ohio.gov/sao](http://www.ohio.gov/sao).

The Office of Procurement Services is the division of DAS responsible for the registration process. Please provide all required information to complete the application process. Once you have completed the registration process using your user id and password you will be able to maintain your registration information online.

Special Note: DAS will provide notice of intended purchases via e-mail. It is imperative that you provide the correct e-mail address.

By continuing to the eBid Registration / Login page, you acknowledge and accept the above notice.

**Continue to the eBid Registration / Login Page**

Need help or would you like to know more about the State of Ohio's eBid System? Please follow the links below:

- eBid FAQs
- eBid Bidders Registration Demo
- eBid User Guide
- Forget Your Password?
- Additional Help
Welcome to OAKS eBid

OAKS eBid is part of the new eStrategic Sourcing (eSS) Module implemented by the Department of Administrative Services, Office of Procurement Services. The bidder registration system provides bidders the opportunity to register by commodity codes for goods or services they can provide. Notices of bid events are then emailed to registrants and after logging into the system, the bidder can update their registration and respond to bid events electronically.

User ID: 
Password: 
Sign In

Vendor Job Aid
Register as a Sourcing Bidder
Click here to register as a bidder and to access bid opportunities
Forgot Password

OAKS is a State of Ohio Computer system, which may be accessed and used only for official state business by authorized personnel. Unauthorized access or use of this computer system may subject violators to Criminal, Civil, and/or administrative action.

Help Desk
If you need assistance or have a question about Bidder Registration, please contact the OAKS Help Desk:

E-mail: oaks.helpdesk@oats.state.oh.us
Phone: 614-644-6525 or 1-888-OhioOAKS (1-888-644-6625)

Hours of Live Support
7am – 5pm Monday - Friday
Unavailable Saturday and Sunday
and State observed holidays

If you would like to email the OAKS Help Desk after normal business hours, an OAKS staff member will respond to your inquiry the following business day.

System Availability:
6am - Midnight
Unavailable Sundays
Begin the 8-step registration process by clicking “Next” in Step 1.

Enter your Company Name and User Information in Step 2.
Registration

Enter the Primary Address for your company in Step 3.

Confirm Primary Address entry in Step 4.

Confirm the User Name in Step 5.
Enter your company’s Tax ID Number & UNSPSC Classification codes in Step 6.

Select Sourcing Categories in Step 7.
Complete your Registration by agreeing to the Terms & Conditions in Step 8 and click “Finish”.

A page will display stating that Bidder Registration was Successful.

An email will follow containing your User ID and Password.
UNSPSC Bidder and Vendor Query

OAKS Navigation: Reporting Tools > Query > Query Viewer

Query Name: OH_SS_UNSPSC_BIDDER_VENDOR
myOhio:
https://myohio.oaks.ohio.gov/psp/PAPRD/EMPLOYEE/EMPL/h/?tab=OH_FIN_HOME
For questions related to eBid Registration or the UNSPSC Bidder & Vendor Query, contact the OAKS Help Desk:

1-888-644-6625

or email

oaks.helpdesk@oaks.state.oh.us
A Few Reminders…

- Please remember to complete your evaluation form before you leave today. They will be collected as you leave the auditorium.

- Our webinar audience can email them to sinuon.todd@das.state.oh.us

- This webinar has been recorded and can be viewed in its entirety on our website @ http://procure.ohio.gov/PDF/SPUG/SPUG.HTM
Thanks for attending today!

This concludes today’s webinar meeting.

Have a great afternoon!